PeopleSoft®

PeopleSoft 8 SP1
Student Records PeopleBook

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Student Records PeopleBook
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Run Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Request ID An ID that represents a set of selection criteria for a report or process.

User ID An ID that represents the person who generates a transaction.

SetID An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

Short Description Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Student Records Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this peoplebook.

Note. This peoplebook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, peoplebook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Student Records PeopleBook* provides implementation and processing information for your PeopleSoft Student Records system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the Student Administration and Contributor Relations product lines. Whether you are implementing only PeopleSoft Student Records, some combination of applications within the product line, or the entire PeopleSoft Student Administration and Contributor Relations system, you should be familiar with the contents of this central peoplebook. It is the starting point for fundamentals, such as setting up control tables and administering security.

In addition to the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook,* you should review the *PeopleSoft Campus Community Fundamentals PeopleBook.* This peoplebook provides an overview of the Campus Community setup tables, and describes many features that are basic building blocks for both PeopleSoft Student Administration and PeopleSoft Contributor Relations.

Note. One or more pages in PeopleSoft Student Records operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.*

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “PeopleSoft Campus Community Preface”

CHAPTER 1

Getting Started With PeopleSoft Student Records

This introductory chapter lists prerequisites of PeopleSoft Student Records, provides overviews of PeopleSoft Student Records, it's business processes, and it's integration with other PeopleSoft Student Administration applications, and discusses implementation.

Important! You should review this information before using PeopleSoft Student Records.

Prerequisites for PeopleSoft Student Records

This section lists prerequisites for PeopleSoft Student Records.

Because all applications within PeopleSoft Student Administration are completely integrated, your institution must complete the prerequisite setup found in the following chapters before you can proceed with PeopleSoft Student Records:

- *PeopleSoft Student Administration Fundamentals PeopleBook:*
  - "Designing Your Academic Structure"
  - "Establishing Terms and Sessions"
  - "Defining Academic Calendars"
  - "Defining Programs, Plans, and Sub-plans"
  - "Setting User Defaults"
  - "Securing Your Student Administration System"
- *PeopleSoft Campus Community Fundamentals PeopleBook: "Managing Biographic and Demographic Data"*

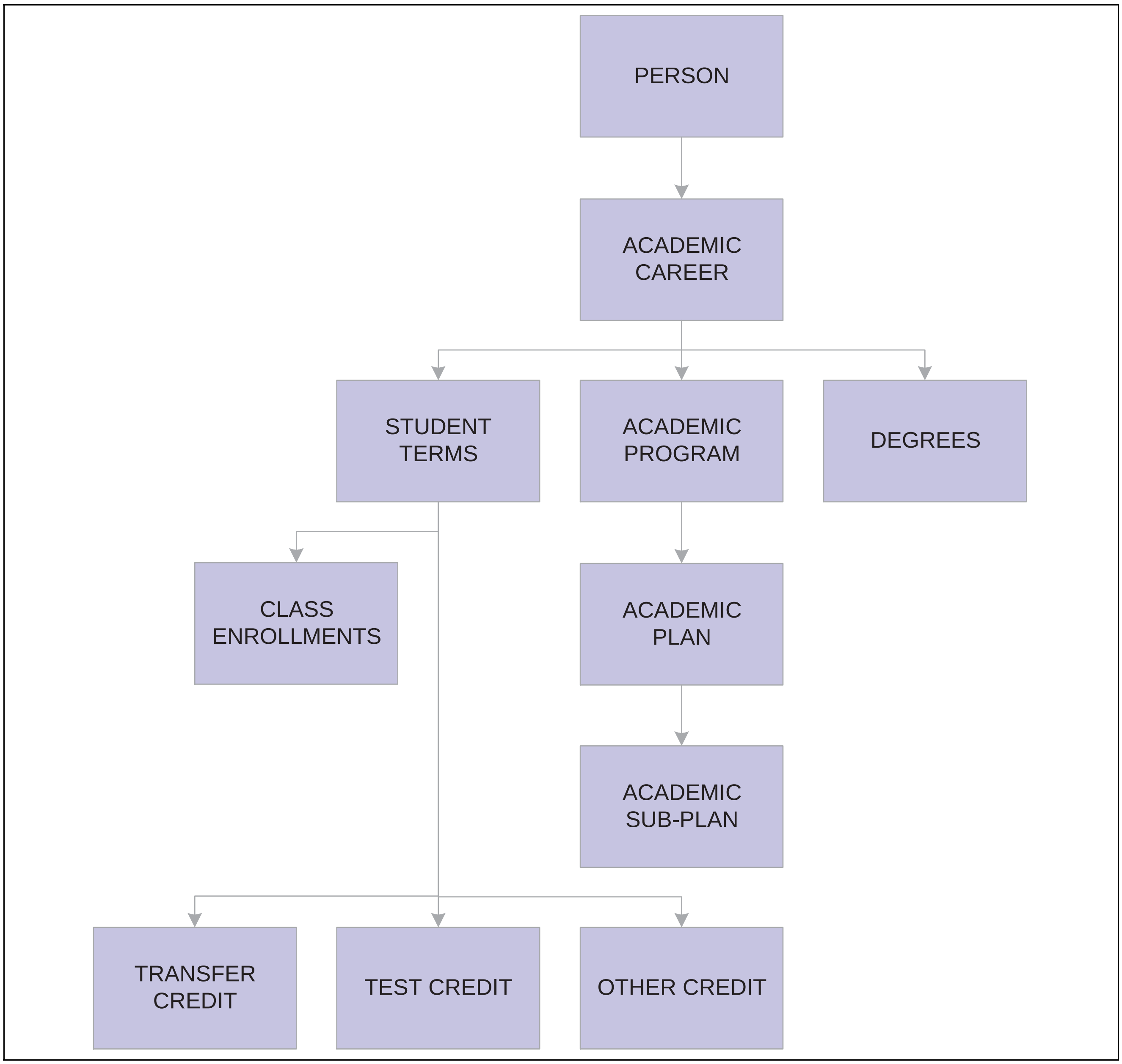
Understanding PeopleSoft Student Records

PeopleSoft Student Records enables you to maintain your course catalog, class enrollment, and grading information in one place while giving the flexibility and power to shape this information into curricular rules and schemes that suit your institution's needs. Student Records handles everything from a robust course catalog to multiple grading systems using intelligent grade tables. You can use the PeopleSoft Student Records tools to tailor a records system uniquely designed around the way you do business.

Through a flexible design, PeopleSoft Student Records minimizes repetitive data entry; streamlines course, class, and requisite information; and provides up-to-date summaries of student statistics, facility occupancy, and class section availability. You gain maximum control over your records and speedy access to your catalog, class, and student data.

Understanding PeopleSoft Student Records Structure

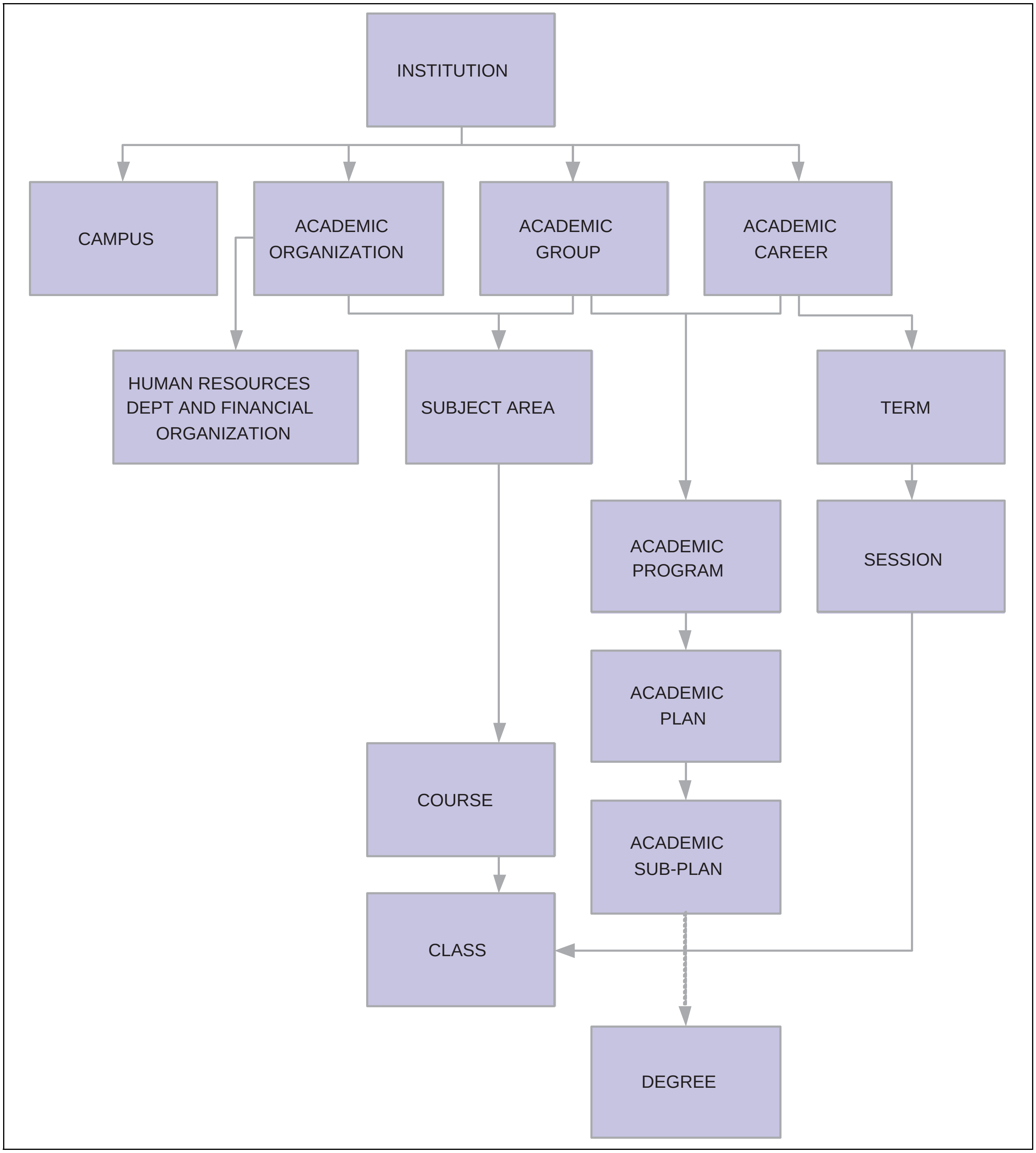
From a student perspective, the structure of PeopleSoft Student Records looks like the following diagram.



Viewing the PeopleSoft Student Records structure from a student perspective

A student is admitted to an academic career and academic program. That student declares an academic plan and, possibly, an academic subplan. She or he then enrolls in sessions within terms for classes and noncourse related requirements to obtain a degree, or possibly a nondegree-related certificate. The student brings course, test, and other transfer credit taken outside of your institution, which your institution integrates into the student's academic record. Transfer credit, whether external or internal, is recorded in the student's career term records.

From an institutional perspective, the structure of PeopleSoft Student Records looks like the following diagram:



Viewing the PeopleSoft Student Records structure from an institution perspective

The academic structure and its elements are the building blocks for your academic institution. You can have many campuses that are part of your academic institution. Academic programs are a part of academic careers and the academic institution. Subject areas are part of academic organizations and the academic institution. Academic plans and academic subplans are subdivisions of academic programs. Degree records are directly linked to academic plans. Courses and classes are subdivisions of subject areas and are directly linked to terms and sessions.

Understanding PeopleSoft Student Records Business Processes

We discuss these business processes in the business process chapters in this PeopleBook.

- *Repeat Checking:* Enables you to manage students' repeat coursework.
- *Course Catalog:* Enables you to set up courses.
- *Enrollment Requisites:* Enables you to set up requisite groups, equivalencies, and course lists.
- *Schedule of Classes:* Enables you to schedule classes, search for facilities, and roll the schedule from term to term.
- *Instructor Workload:* Enables you to update, track, and report workload hours for individuals.
- *Program Activation and Management:* Enables you to activate students into academic programs and maintain their academic program, plan, and subplan data.
- *Batch Term Activation:* Enables you to activate groups of students into terms.
- *Quick Activation:* Enables you to activate students into academic programs, bypassing the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions.
- *Student Career Term Record Management:* Enables you to monitor and track student career term related records.
- *Enrollment Appointments:* Enables you to create and manage enrollment appointments.
- *Class Enrollment Transactions:* Enables you to enroll students into classes through various processes.
- *Enrollment Related Processes:* Enables you to enroll perform withdrawals and cancellations, manage wait lists, view summary statistics, and more.
- *Enrollment Verification:* Enables you to process enrollment verification reports for students, and if you have licensed PeopleSoft Learner Services, students can request the enrollment verification through self-service.
- *Transfer Credit:* Enables you to evaluate, process, and post course, test, and other transfer credit using defined rules or manual rules.
- *Attendance Tracking:* Enables you to generate attendance rosters and track student attendance.
- *Student Data Tracking:* Enables you to link milestones to student records, manage honors and awards, manage academic standing, track student groups, maintain service indicators, and maintain extracurricular activities.
- *Interoperability for Learning Management Systems:* Give you the ability to provide a third-party learning management system (such as Blackboard CourseInfo) with personal profile data for learners and instructors, including enrollment data and maintenance, and limited course scheduling data maintenance.
- *Grading:* Enables you to generate grade rosters, enter grades and reviews, the mid-term deficiency report, and the grade lapse process.
- *Graduation:* Gives you the ability to define degrees and honors, run the graduation reporting process, and graduate students.
- *Transcripts:* Gives you the ability to set up transcript data, define a transcript request, and produce transcripts.

- *Academic Statistics Consolidation and Reporting:* Enables you to prepare the system to consolidate academic statistics for students, to run processes that consolidate academic statistics, to make use of the consolidated statistics after processing them.
- *Canadian Government Reporting:* Enables users with an installation country of Canada to generate reports for federal and provincial agencies.

Understanding PeopleSoft Student Records Integrations

PeopleSoft Student Records is completely integrated with the entire PeopleSoft Student Administration system. The way that you define your academic organizations, careers, groups, and calendars directly affects Student Records and the other applications in the system. Take time to thoroughly explore *PeopleSoft Student Records PeopleBook* and *PeopleSoft Student Administration Fundamentals PeopleBook* before you launch a design for your student records system.

Because your system is integrated it is important to understand how the actions that you take in PeopleSoft Student Records can affect other applications such as PeopleSoft Recruiting and Admissions, Student Financials, and Financial Aid.

The following is a list of pages where the documentation indicates overlapping processes with other applications within PeopleSoft Student Administration. This is not meant to be a comprehensive list, but a list to give you an idea of the interrelated nature of your PeopleSoft system.

- Terms, sessions, and unit limits affect PeopleSoft Student Financials and PeopleSoft Financial Aid.
- Level/load rules are jointly set up with PeopleSoft Financial Aid, particularly for NSLDS reporting.
- Course catalog data, such as course units and financial aid progress units, affects need analysis in PeopleSoft Financial Aid.
- Committee types and committee roles are shared with PeopleSoft Campus Community, Recruiting and Admissions, and Financial Aid.
- Extracurricular activities and honors and awards are shared with PeopleSoft Campus Community and PeopleSoft Recruiting and Admissions.
- Service indicators, service indicator reasons, and service effects are shared with all applications.
- Grading basis rules are shared with PeopleSoft Recruiting and Admissions.
- Buildings, facilities, and room characteristics are shared with PeopleSoft Campus Community.
- Tuition calculation is shared with PeopleSoft Student Financials.
- Comments, checklists, and communications are shared with all applications.

We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Implementing PeopleSoft Student Records

This section provides an overview of PeopleSoft Student Records implementation and discusses how to analyze student records business processes.

Understanding PeopleSoft Student Records Implementation

Implementing PeopleSoft Student Records for your institution involves designing your record structure and putting that structure into place. Take a close look at how your institution operates. Before you can make the most of the application's flexible design, you must determine the best way to use the application in your institutional structures. The tools that we provide can be a catalyst and support for your reengineering efforts.

Map your PeopleSoft Student Records business processes thoroughly before you actually plan conversion programs from your current system to PeopleSoft Student Records, and before you begin entering data.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources is in the Preface, with information on where to find the most up-to-date version of each.

Analyzing Student Records Business Processes

Implementing PeopleSoft Student Records requires you to examine the structure of your own student records business processes and to explore Student Records. When designing your student records system, analyze how you can reflect your institution's policies, procedures, and processes through the application. The following are examples of questions to ask before implementing the application in your institution:

- How does your course approval process work and how are new requisites and requirements defined?

  One of the powerful features of PeopleSoft Student Records is the ability to create enrollment requirement groups to fulfill your institution's need for class requirements and reserve capacities. Taking a look at how you currently define requisites and how new requisites come to life in your institution is a key step in using this powerful tool to its maximum.

- What are your current grading schemes and are they different for every career within your institution?

  Another feature of PeopleSoft Student Records is its ability to support multiple grading systems, using intelligent grade tables. If your institution has variable grading schemes among your different careers, using the grade mapping rules is particularly useful.

- Are your academic careers and programs based on academic calendars with a term/session structure, a dynamic date structure, or both?

  PeopleSoft Student Administration provides two methods for defining your academic calendars, both of which affect PeopleSoft Student Records. Which method that you choose depends on the academic structure and specific needs of your institution. You can define your academic calendars based solely on the term and session construct, or you can define your academic calendars dynamically with the Dynamic Class Dates feature, going beyond terms and sessions right down to the classes themselves.

- What are your transfer equivalency rules?

  Defining equivalency rules for processing transfer credit, whether for course, test, or other credit, can be complex. The PeopleSoft Student Records transfer credit design enables you to create predefined rules or manual ones. You can share external course catalogs between academic institutions, simplifying data entry.

- What are your repeat rules and how do you code repeats?

Define, in the course catalog, whether courses are repeatable or not. Define repeat rules and the codes to place on student academic records using our repeat rules component, then run the Repeat Checking process using PeopleSoft Process Scheduler or automatically during enrollment and at grading time.

See Also

"PeopleSoft Student Records Preface," page xxxvii

CHAPTER 2

Preparing for the Course Catalog and Schedule of Classes

This chapter reviews setup prerequisites for the course catalog and schedule of classes, and discusses how to:

- Set up data options for the catalog and schedule.
- Define facilities.
- Designate approved instructors and advisors.
- Set up requirement designations.
- Define academic level and load rules.
- Set up unit conversions.
- Define meeting patterns on the Standard Meeting Patterns page.
- Define modes of instruction on the Instruction Mode page.

See Also

Chapter 4, "Setting Up the Course Catalog," page 65

Chapter 17, "Managing the Schedule of Classes," page 349

Setting Up Catalog and Schedule Options

When you first create or update the course catalog and schedule of classes, the system prompts you for various types of optional course and class data. This section reviews the pages where you can set up this data and discusses how to:

- Create class notes.
- Define course attributes.
- Define exam codes.
- Define global notes.

Pages Used to Establish Catalog and Schedule Options

Page Name	Object Name	Navigation	Usage
Class Notes Table	CLASS_NOTES_TBL	• Design Student Administration, Define Student Records, Setup, Class Notes Table, Class Notes Table • Manage Student Records, Establish Courses, Setup, Class Notes Table, Class Notes Table	Create a class note.
Global Notes Table	GLOBAL_NOTES_TBL	• Design Student Administration, Define Student Records, Setup, Global Notes Table, Global Notes Table • Manage Student Records, Establish Courses, Setup, Global Notes Table, Global Notes Table	Define global notes.
Course Attributes	CRSE_ATTR_TBL	• Design Student Administration, Define Student Records, Setup, Course Attributes, Course Attributes • Manage Student Records, Establish Courses, Setup, Course Attributes, Course Attributes	Define course attributes and attribute values.
Exam Code Table	EXAM_CODE	• Design Student Administration, Define Student Records, Setup, Exam Code Table, Exam Code Table • Manage Student Records, Establish Courses, Setup, Exam Code Table, Exam Code Table	Establish exam time codes for different types of examinations.

Defining Class Notes

Access the Class Notes Table page.

Note. Class notes differ from global notes because class notes are attached to classes on the Notes page, whereas global notes are attached to entire academic subject areas or academic groups.

Effective Date Enter an effective date for the class note. The effective date defines when the status you select is valid.

Status Select a status for the class note. Select *Active* when adding a new class note. Use the *Inactive* option if your institution no longer uses this class note.

Description This is used for internal processes only.

Note Text This text appears in the schedule of classes if you assign this note to a class on the Notes page.

Defining Global Notes

Access the Global Notes Table page.

Note. You always associate global notes with an academic institution, academic group, and term. You can further associate global notes with a subject area. If you do not specify a subject area, the global note appears on the top of every corresponding schedule of classes page, before or after the academic group or subject area.

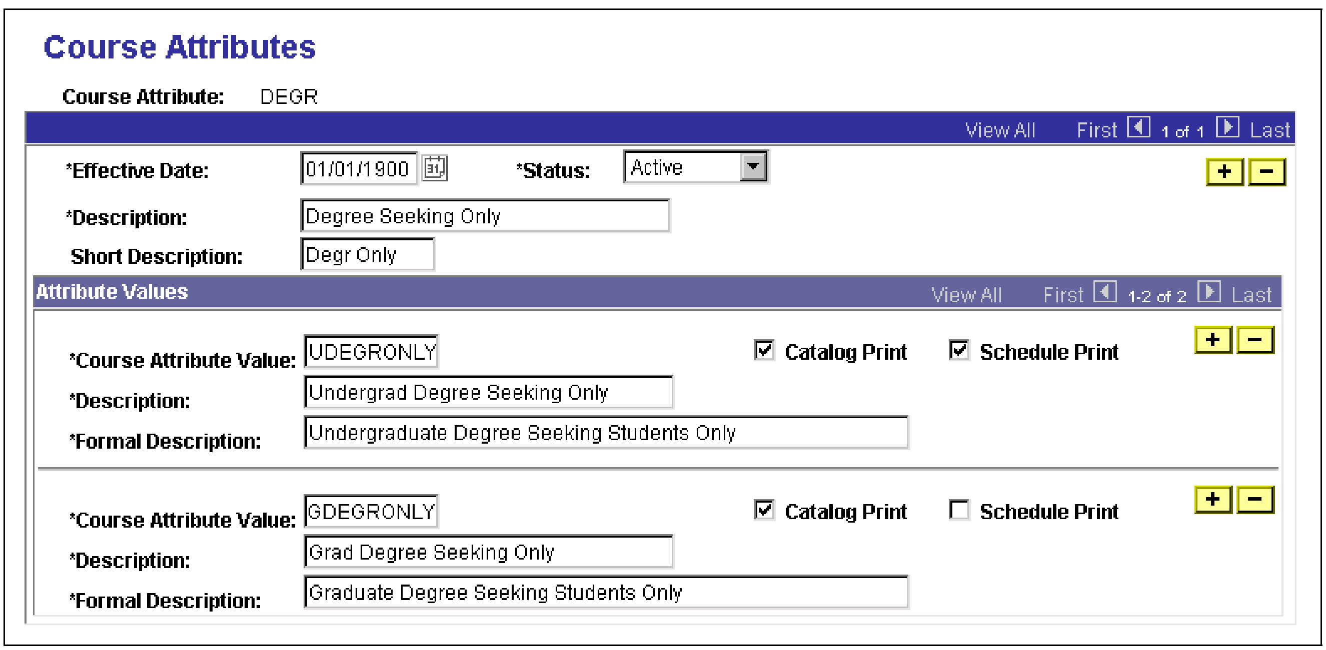
Print Location Indicates whether the note text appears on the schedule of classes report before or after the subject area (if you specify a subject area), or if the note text appears before or after the academic group for the term (if you do not specify a subject area.) Available values are *Print After* and *Print Before.* We recommend that you do not change these values because doing so requires a substantial programming effort.

Description Describes the global note.

Note Text This text appears on the schedule of classes report in the location that you specify.

Defining Course Attributes

Access the Course Attributes page.



Course Attributes page

Note. Use course attributes for institutional research purposes and to print repetitive text in the schedule of classes or course catalog, such as *Offered in Fall Only.* Course attributes are attached to courses on the Catalog Data page and to classes on the Basic Data page. Unlike requirement designations, course attributes do not transfer to PeopleSoft Academic Advisement.

Status Select a status for this course attribute. Select *Active* when adding a new course attribute. Use the *Inactive* option if your institution no longer uses this attribute and any of the corresponding attribute values.

Description Appears on the schedule of classes report or the course catalog report if you select the Schedule Print check box or theCatalog Print check box.

Short Description Short description for the attribute.

Course Attribute Value When you attach attributes to courses and classes, you can also specify attribute values. Therefore, you can define parent course attributes that have one or more attribute values.

In the preceding example, the *Degree Seeking Only* attribute has attribute values of *Undergraduate Degree Seeking Only* and *Graduate Degree Seeking Only.* Insert rows to create multiple attribute values.

Description Enter a description of the attribute values.

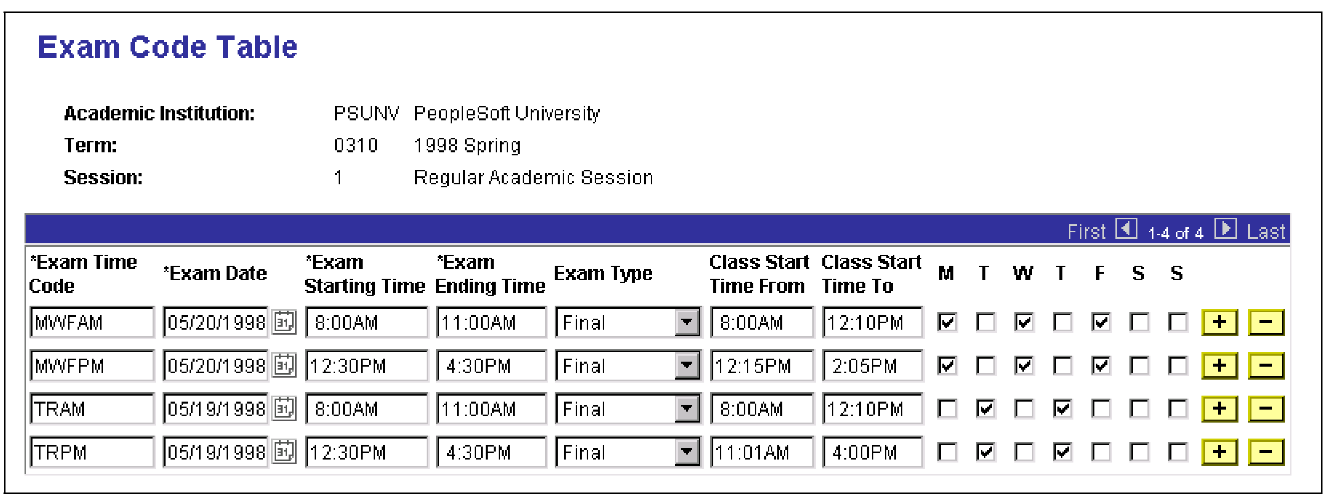
Formal Description Appears on the schedule of classes report or the course catalog report if you select the Schedule Print check box or the Catalog Print check box.

Catalog Print Select to display the course attribute formal description in the course catalog report.

Schedule Print Select to display the course attribute formal description in the schedule of classes report.

Defining Exam Codes

Access the Exam Code Table page.



Exam Code Table

Academic Institution: PSUNV PeopleSoft University
Term: 0310 1998 Spring
Session: 1 Regular Academic Session

First 1-4 of 4 Last

*Exam Time Code	*Exam Date	*Exam Starting Time	*Exam Ending Time	Exam Type	Class Start Time From	Class Start Time To	M	T	W	T	F	S	S
MWFAM	05/20/1998	8:00AM	11:00AM	Final	8:00AM	12:10PM	☑	☐	☑	☐	☑	☐	☐
MWFPM	05/20/1998	12:30PM	4:30PM	Final	12:15PM	2:05PM	☑	☐	☑	☐	☑	☐	☐
TRAM	05/19/1998	8:00AM	11:00AM	Final	8:00AM	12:10PM	☐	☑	☐	☑	☐	☐	☐
TRPM	05/19/1998	12:30PM	4:30PM	Final	11:01AM	4:00PM	☐	☑	☐	☑	☐	☐	☐

Exam Code Table page

Note. Define exam time codes for each term and session. The system uses these codes when you run the exam scheduling process on the Exam Scheduling page. You can also manually post these codes to individual classes.

Exam Time Code	Enter an exam time code to define (in an abbreviated manner) the exam code.
Exam Date	The date for the exam.
Exam Starting Time	The start time of the exam.
Exam Ending Time	The end time of the exam.
Exam Type	Select the exam type. Values for this field are delivered with your system as translate values. You can modify these translate values.
Class Start Time From	Enter the minimum start time for classes with which you want to associate the exam time code. The system uses the value during the exam scheduling process. The system schedules exams for classes that fall within the two start times (and days) that you designate.
Class Start Time To	Enter the maximum start time for classes with which you want to associate the exam code. The system uses the value during the exam scheduling process. The system schedules exams for classes that fall within the two start times (and days) that you designate.
M (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday)	Select the days of classes that you want to associate with the exam code.

See Also

Chapter 17, "Managing the Schedule of Classes," Scheduling Exams, page 400

Defining Buildings, Rooms, and Classroom Facilities

During the class scheduling process, you will probably need to assign classes to classrooms, and it is best if you set up your classroom facilities in advance. This section discusses how to:

- Define buildings.
- Define room characteristics.
- Define facilities and rooms.
- Define facility components.
- Define facility characteristics.

Pages Used to Define Buildings, Rooms, and Classroom Facilities

Page Name	Object Name	Navigation	Usage
Building Table	BLDG_TBL	Design Student Administration, Define Student Administration, Setup, Building Table, Building Table	Define all campus buildings that you might use in class and event scheduling. Building codes that you create here are prompt values on the Facility Table page.
Room Characteristics	ROOM_CHRSTC_TBL	• Design Student Administration, Define Student Administration, Setup, Room Characteristics Table, Room Characteristics Table • Manage Student Records, Establish Courses, Setup, Room Characteristics Table, Room Characteristics Table	Define room characteristics, such as types of seating and resources available. You attach room characteristics to facilities on the Facilities Characteristic page and you can use them when you: • Define courses. • Schedule classes. • Plan events. You must enter a numeric room characteristic code from *01* to *96*.
Facility Table	FACILITY_TBL	• Design Student Administration, Define Student Administration, Setup, Facility Table, Facility Table • Manage Student Records, Establish Courses, Setup, Facility Table, Facility Table	Define facilities and facility components.
Facility Component	FACILITY_COMPONENT	• Design Student Administration, Define Student Administration, Setup, Facility Table, Facility Component • Manage Student Records, Establish Courses, Setup, Facility Table, Facility Component	Link components of facilities to parent facilities.
Facility Characteristic	FACILITY_CHRSTC	• Design Student Administration, Define Student Administration, Setup, Facility Table, Facility Characteristic • Manage Student Records, Establish Courses, Setup, Facility Table, Facility Characteristic	Define room characteristics and facility blackout times.

Setting Up Buildings

Access the Building Table page.

Status Select the status of the building. Select *Active* when the building is being used on the Facility Table page. Select *Inactive* when you no longer use the building.

Description Enter a description of the building.

Short Description Enter a short description of the building.

Setting Up Room Characteristics

Access the Room Characteristics Table page.

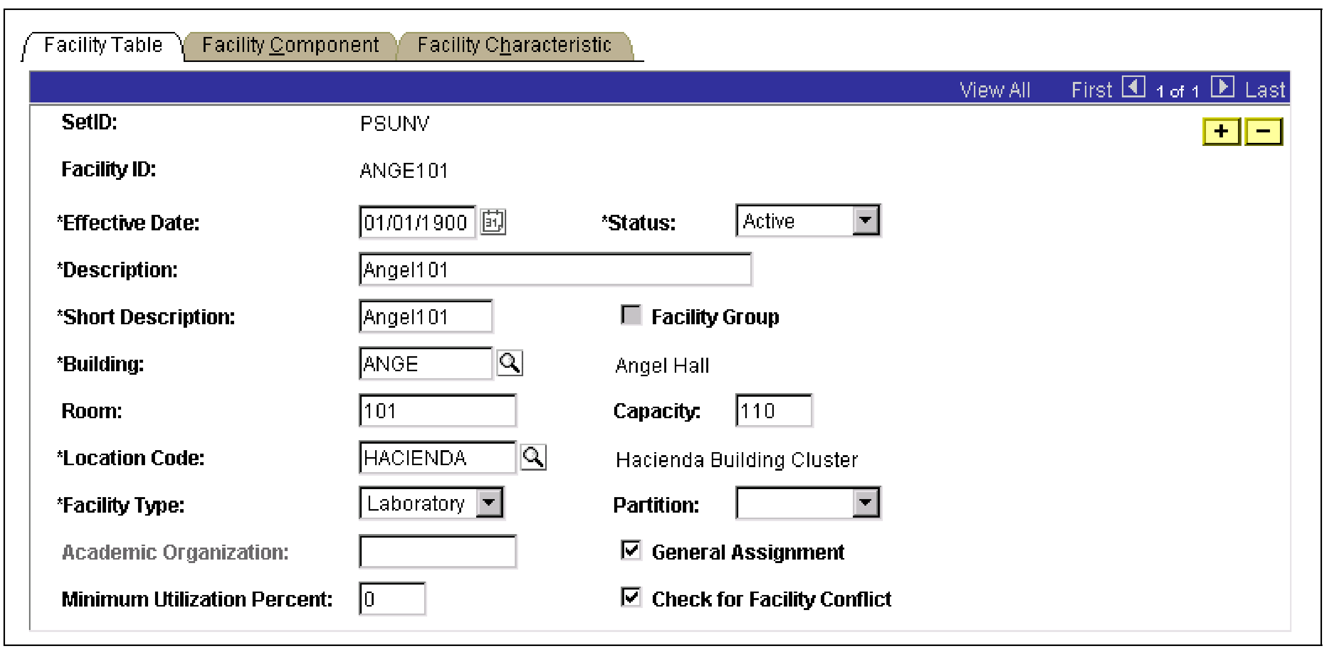
Status Select a status for this room characteristic. Select *Active* when adding a new room characteristic. The *Inactive* option should be used only if your institution no longer uses this room characteristic.

Description Enter a description.

Short Description Enter a short description.

Defining Facilities and Rooms

Access the Facility Table page.



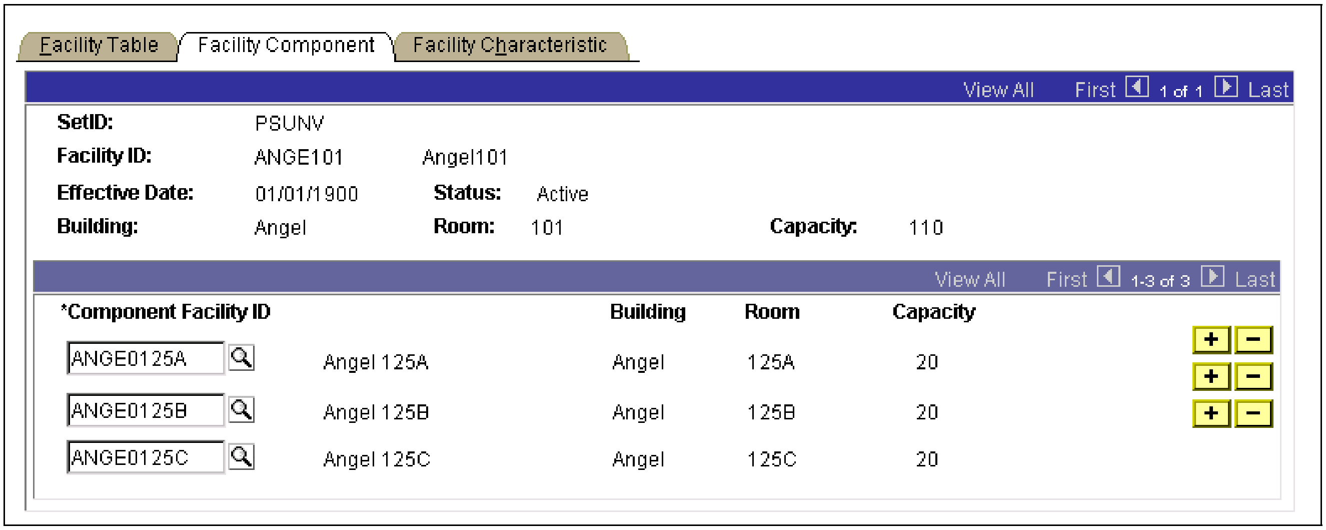
Facility Table page

As an example, you might want to define Angel Hall Room 125, and its components-Angel 125A, 125B, and 125C. You can't link components to parent facilities on the Facility Component page unless you first define both the parent facility and the facility components on the Facility Table page.

Status	Select a status for this facility. Select *Active* when adding a new facility. The *Inactive* option should be used only if your institution no longer uses this facility.
Description	Enter a description of the facility.
Short Description	Enter a short description of the facility.
Facility Group	If this check box is selected and unavailable for entry, the facility is a “parent” facility with facility components.
Building	The building in which the facility is located. Buildings are defined on the Building Table page.
Room	The room number.
Capacity	The maximum number of people a facility accommodates.
Location Code	Can specify locations such as a building cluster on campus or satellite campuses. Location codes are defined on the Location Table in the Human Resources menus in your system.
Facility Type	Select a facility type to further define the space. Values for this field are delivered with your system as translate values. You can modify these values.
Partition	Select a partition field value to indicate the section of the campus where the facility is located, such as *First, Second, Third,* or *Fourth* quadrant. Use the Partition field to interface with Universal Algorithm’s product, Schedule25, which can look at where an instructor’s office is located and attempt to schedule the instructor’s classes in facilities within the same partition. The maximum number of partitions for Schedule25 is *96.* Therefore, be sure you select a value between *01* and *96.* Values for this field are delivered with your system as translate values. You can modify these values. For more information about the interface with Universal Algorithm’s Schedule25, refer to the Schedule25 documentation.
Academic Organization	Specify whether this facility is reserved for sole use by an academic organization or if it is available for general assignment. Locations might be reserved by academic organizations so that only classes for that academic organization are assigned to that location when using Universal Algorithm’s product, Schedule25. When using PeopleSoft’s internal facility search and assignment feature, the system does not use academic organization.
General Assignment	Select to open the location for general assignment. When you select this check box, the Academic Organization field becomes unavailable.
Minimum Utilization Percent	Indicates the minimum usage a facility should experience. This field is for internal record keeping only, and has no programming tied to it.
Check for Facility Conflict	Select to have the system allow only one class to be scheduled for this facility at any given period of time. If you want to schedule more than one class at the same time in this particular facility, such as a field or gymnasium, do not select this check box.

Defining Facility Components

Access the Facility Components page.



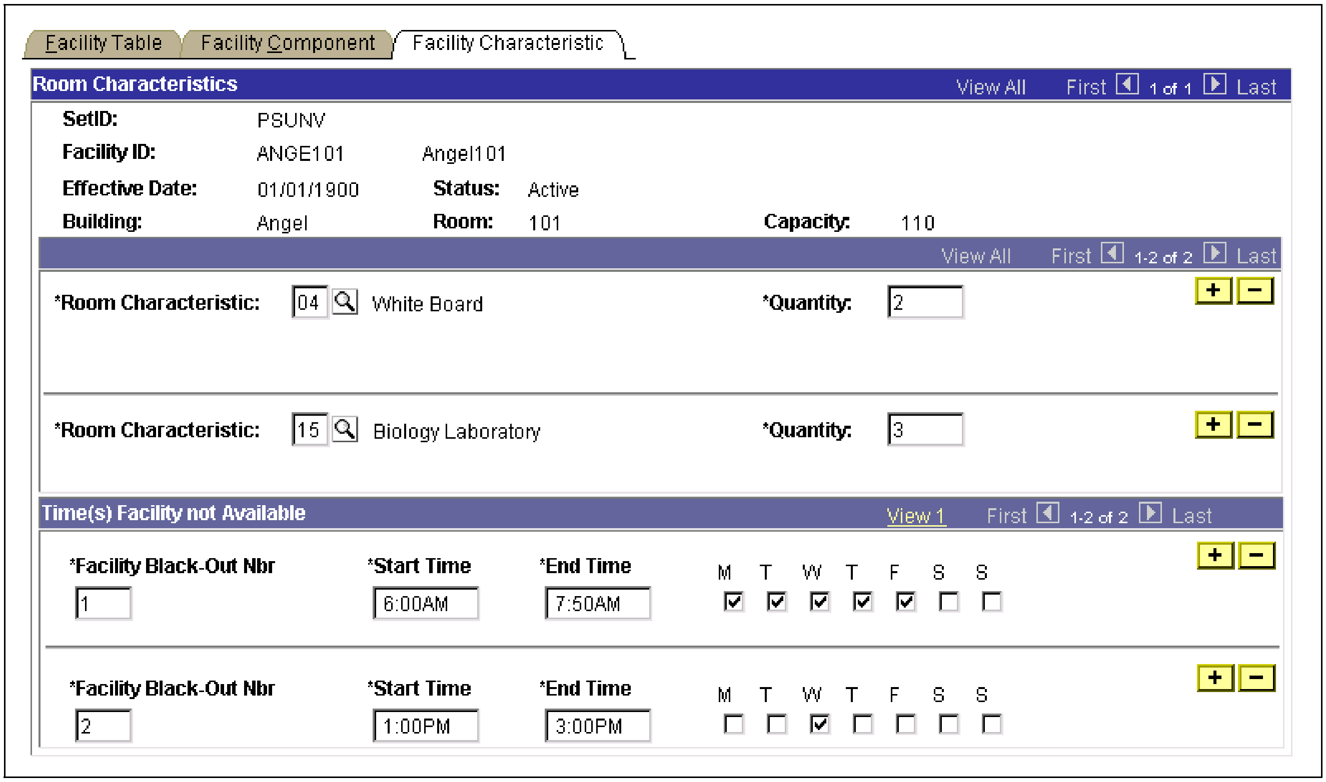
Facility Component page

As an example, Angel 125A, B and C might be linked as components of Angel 125. In order to link facility components to a “parent” facility, you must first define all facilities on the Facility Table page. As soon as components are linked to a “parent” facility, the system calculates the capacity of that facility by adding up the capacities of all components. If a class is scheduled in a component of a facility and someone attempts to schedule a class in the “parent” facility, the system prevents the new scheduling.

Component Facility ID Select the component facility ID for a component that you want to link to this facility. All facilities in the Facility Table page are available for selection. To link more than one component to a parent facility, add rows.

Defining Facility Characteristics

Access the Facility Characteristics page.



Facility Characteristic page

Room Characteristic — Select characteristics for this room. Room characteristics are defined on the Room Characteristic Table page. Insert rows to add characteristics. The system uses the Room Characteristic field to interface with Universal Algorithm's product, Schedule25. The maximum number of room characteristics for Schedule25 is *96.* Therefore, be sure you select values between *01* and *96.*

Quantity — Enter the quantity of the room characteristic. For example, enter a *2* to indicate that there are two white boards.

Facility Black-Out Nbr (facility black-out number) — You can define periods when a facility is unavailable. The facility blackout number is system-generated. This number simply indicates the number of blackout periods that exist for a facility. You can override the system assigned facility blackout number.

Start Time and **End Time** — Enter a start and end time for the blackout period.

M (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday) — Select the days of the week for which the blackout period applies.

Note. PeopleSoft Student Records provides the facility blackout structure for compatibility with Resource 25. When using Resource 25, the system prevents class and event scheduling during blackout periods. When using PeopleSoft's internal conflict checking logic, the system does not use this structure.

Designating Approved Instructors and Advisors

This section discusses how to:

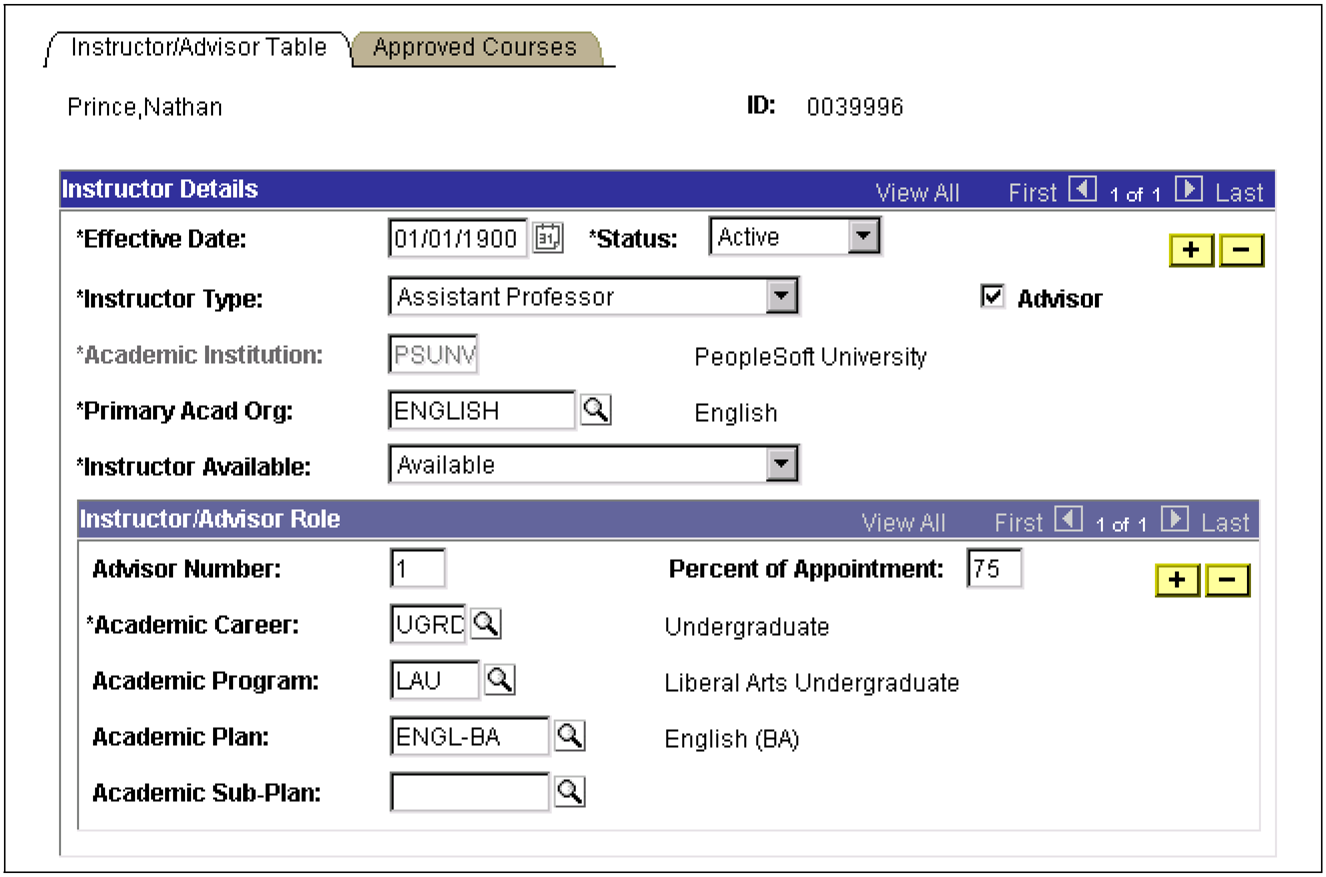
- Assign rank, academic organization assignment percentage, and advisor status.
- Specify courses that an individual is approved to teach.

Pages Used to Define Instructors and Advisors

Page Name	Object Name	Navigation	Usage
Instructor/Advisor Table	INSTR_ADVISOR	• Design Student Administration, Define Student Records, Setup, Instructor/Advisor Table, Instructor/Advisor Table • Manage Student Records, Establish Courses, Setup, Instructor/Advisor Table, Instructor/Advisor Table • Manage Student Records, Track Student Careers, Setup, Instructor/Advisor Table, Instructor/Advisor Table	Indicate faculty rank, advisor status, instructor availability, and the courses that an instructor can teach. You are not adding new people to the database on this page, but updating information for individuals who are already in the database. The IDs available depend upon the way that you set up your instructor edit.
Approved Courses	INSTR_ADVISOR2	• Design Student Administration, Define Student Records, Setup, Instructor/Advisor Table, Approved Courses • Manage Student Records, Establish Courses, Setup, Instructor/Advisor Table, Approved Courses • Manage Student Records, Track Student Careers, Setup, Instructor/Advisor Table, Approved Courses	Indicate courses that an instructor can teach. The system uses the values you enter as part of the Instructor Edit feature, which is an option that enables you to link instructors to specific campuses, subjects, or courses within an academic organization. This way, when you schedule classes only the relevant instructors appear as choices.

Indicating Faculty Rank and Advisor Status

Access the Instructor/Advisor Table page.



Instructor/Advisor Table page

Instructor Type Select an instructor type. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. If you select a value of *Advisor Only,* the system selects the Advisor check box by default and you can not change it.

Advisor Select in order to indicate that the individual is also an advisor and to place the individual into the system's Advisor view. You can later select the Advisor view as a search tool on various pages.

Academic Institution Select the academic institution with which you want to associate this record.

Primary Acad Org (primary academic organization) Select a primary academic organization for this instructor. Academic organization values are defined on the Academic Organization Table page.

Instructor Availability Select the instructor's availability to teach within the effective date. Select *Available, Sabbatical,* or *Unavailable.* If the instructor has an advisor type of *Advisor Only,* the system populates their instructor availability with *Unavailable* by default. You can override this value.

Instructor/Advisor Role

Use the Instructor/Advisor Role scroll area to indicate the academic career, program, plan, and subplan to which the instructor or advisor is linked.

Advisor Number The system populates this field with *1* by default. If an instructor advises students in more than one academic career, program, plan or subplan, you can have multiple advisor numbers by adding rows.

Percent of Appointment Enter a percent of appointment value this instructor has for the indicated academic career, program, plan, and subplan. Instructors with dual appointments can have different percentages reflecting their responsibility. The total percentage must equal 100.

Academic Career Select the academic career to which the instructor or advisor is linked. Academic career values are defined on the Academic Career Table page.

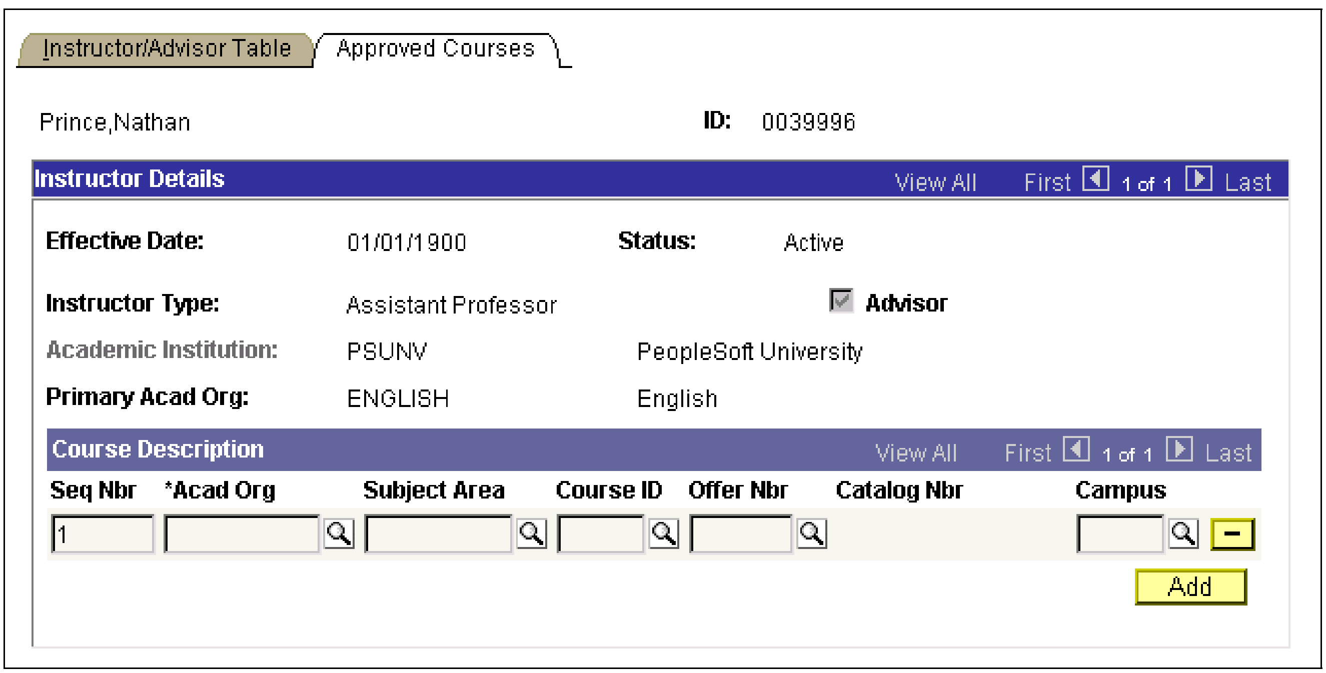
Academic Program Select the academic program to which the instructor or advisor is linked. Academic program values are defined on the Academic Program Table component.

Academic Plan Select the academic plan to which the instructor or advisor is linked. Academic plan values are defined on the academic plan pages.

Academic Sub-Plan Select the academic subplan to which the instructor or advisor is linked. Academic subplan values are defined on the academic subplan pages.

Designating Approved Course Instructors

Access the Approved Courses page.



Approved Courses page

To make use of the values on this page, enable the Instructor Edit feature. To do so, you must choose, on the Academic Organization Table page, to edit instructors against the Instructor/Advisor table rather than the Personal Data table for the related academic organization. You must also select this option on the Course Catalog Description page for the courses involved.

Having done so, when you schedule classes on the Class Meeting Pattern/Instructor page and have to assign an instructor to a class that falls within the academic organization and courses that you have set up in this manner, the system displays only the relevant instructors in the ID field.

In the lower portion of the page, select which subjects, courses, or campuses at which the instructor is approved to teach based on effective date. The availability of these fields depends on the options your institution selects to edit instructors by on the Academic Organization Table page.

Seq Nbr (sequence number)	The system populates the Seq Nbr field by default. Sequence numbers are sequential numbers that the system assigns to identify rows in the table.
Acad Org (academic organization)	Select the academic organization to indicate that the instructor is approved to teach all courses within the academic organization that you specify. If your institution has set up the academic organization to edit instructors by campus, subject, and course, you can further narrow the courses. This field is required.
Subject Area	If available, select the subject area that the instructor is approved to teach. Subject area values are defined for each academic institution on the Academic Subject Table page.
Course ID	If available, select the course ID of the course that the instructor is approved to teach. You are prompted from the course catalog. If your course catalog only has one offering number, the system populates the offering number by default.
Offer Nbr (offering number)	If available, select the offering number of the class the instructor is approved to teach.
Catalog Nbr (catalog number)	The system displays the catalog number, based on the course catalog definition.
Campus	Select the campus for which the instructor can teach. Campus values are defined for each academic institution on the Campus Table page. Add rows to further specify courses the instructor is approved to teach.

Creating Requirement Designations

This section provides an overview of requirement designations and discusses their setup.

Understanding Requirement Designations

Requirement designations, unlike course attributes, transfer to PeopleSoft Academic Advisement. A requirement designation can be extra credit that a student has done for a course, such as Design Credit. For example, you can attach a requirement designation of *Design* to all first-, second-, third-, and fourth-year architecture studio courses that carry the optional add-on enrollment of *Design Credit.* When students enroll in any of these studios, they can elect to take the course to fulfill their design credit certification. Requirement designations are intended as optional add-on credit for a course, where some students in a class are taking the class alone, and others in the same class are taking both the class and attempting to pass the requirement designation portion. In this way, the requirement designation reflects extra credit. Some students in the class attempt it, while others do not.

Requirement designations are to be used sparingly, and are *not* intended to track general advisement requirements. They are meant as additional qualifiers that alone may be a requirement. With relation to the previous example, you may require a total of six hours of design credit across four years of architecture study, in addition to the minimum unit and grade point average requirements for the courses. By using a requirement designation, you give students the option to complete their design credit at any stage and pace across four years. Student A may choose to attempt her design credit during their second and fourth years, in the spring term. Student B may opt to complete all six of his design hours while enrolled in their fourth-year studio, during the fall and spring terms. Although these two students are in the same studio classes across the four years, they pace themselves and complete assignments differently. Student A begins to explore design practices as a sophomore (by doing some type of additional design work in consultation with her professor), while student B decides to wait and load up on design work the last year of his career as an architecture student. Typical requirement designations may include *Counts Toward Design Certification, Preparation for Licensing Exam, Electing course to be the basis of Liberal Arts Thesis Credit,* and so on. Requirement designations can be graded as *Satisfied* or *Not Satisfied.*

In the previous example, the design credit requirement designation was set up as an enrollment option. Students can elect to take the design credit requirement designation at the time of enrollment in certain architecture studio classes. You can also create a requirement designation that is not optional at enrollment. This type of requirement designation is strictly attached to a class. Taking the class—along with the requirement designation—is required of all students who enroll. The distinction between a requirement designation that is elective at enrollment and one that is automatically added to a student's enrollment request, is the way that you set the At Student's Option check box on the Requirement Designation Table page. This option and others like it are discussed in the following section.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Course Lists"

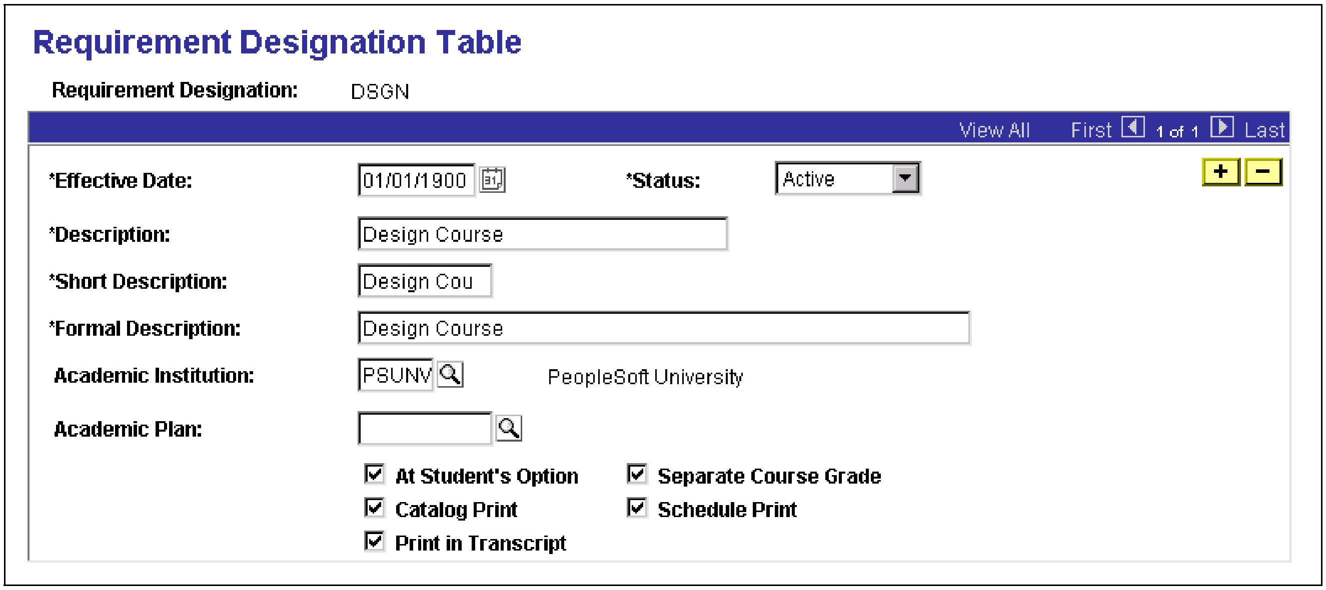
Chapter 33, "Grading Students," page 727

Pages Used to Define Requirement Designations

Page Name	Object Name	Navigation	Usage
Requirement Designation Table	RQ_DESIGNATION_TBL	• Design Student Administration, Define Student Records, Setup, Requirement Designation Table, Requirement Designation Table • Manage Student Records, Establish Courses, Setup, Requirement Designation Table, Requirement Designation Table • Manage Student Records, Manage Academic Records, Setup, Requirement Designation Table, Requirement Designation Table	Define requirement designations.

Defining Requirement Designations

Access the Requirement Designation Table page.



Requirement Designation Table page

Status

Select a status for this requirement designation. Select *Active* when adding a new requirement designation. The *Inactive* option should be used only if your institution no longer uses this requirement designation.

Description, Short Description, and **Formal Description**

Enter a description, short description, and formal description. The formal description appears on the course catalog report, schedule of classes report, and transcript if specified.

Academic Institution

Select an academic institution with which you want to associate the requirement designation. This affects the availability of this requirement designation on the course catalog and schedule of classes prompts.

Academic Plan

Select an academic plan if you want to link the requirement designation to a specific plan. At enrollment, a student must be active in the specified plan to enroll in any class with the related requirement designation. There are overrides on the Enrollment Request 1 page that permit you to override this general rule if you have the appropriate security permissions. On the Enrollment page, the system does not validate this.

At Student's Option

Select to indicate that the student can select the requirement designation at enrollment. You can indicate a student's choice of requirement designation on the Enrollment Request Page, the Student Enrollment 4 page, or the Block Enrl Detail 2 page.

If you do not select this check box, students that enroll in classes that have this requirement designation are required to take the course and attempt the additional requirement designation credit.

See Chapter 24, "Processing Class Enrollment Transactions," page 505.

Catalog Print and **Schedule Print**
Select to enable the display of the requirement designation formal description and the course in the course catalog report and schedule of classes report.

Print in Transcript
Select to print the requirement designation and requirement designation grade on the student's transcript.

Separate Course Grade
Select to indicate that the requirement designation involves work that someone must grade separate from the course. If cleared, students who earn credit for the course will, by default, earn a grade of *Satisfied* for the requirement designation. The professor does not need to assign two grades for every student (for example, a letter grade of *B* for the course, and a grade of *Satisfied* for the requirement designation.)

On the other hand, should the professor want to evaluate a student on each of these two areas independently, select the check box. This setting is optimal in the event that a student receives a passing grade for the class, but fails to successfully complete the requirement designation. In this instance, the professor could assign a letter grade of *B* to the class, and assign a grade of *Not Satisfied* for the requirement designation. The class would not fulfill an advising requirement that requires both a class and a requirement designation for the class.

It would only fulfill an advising requirement that requires the class alone.

See Chapter 33, "Grading Students," Using the Grade Roster Page to Enter Grades, page 731.

Defining Academic Level and Load Rules

Use the Level/Load Rules component to define academic level and academic load rules for every academic career at your institution. Various system processes use these rules to determine a student's academic level and academic load—processes such as class enrollment, financial aid reporting, and consolidating academic statistics.

This section discusses how to:

- Define academic level and load determination values.
- Define level rules.
- Define load rules.
- Define contiguous term load rules.

See Also

PeopleSoft 8 SP1 Financial Aid PeopleBook, "Managing Financial Aid Terms"

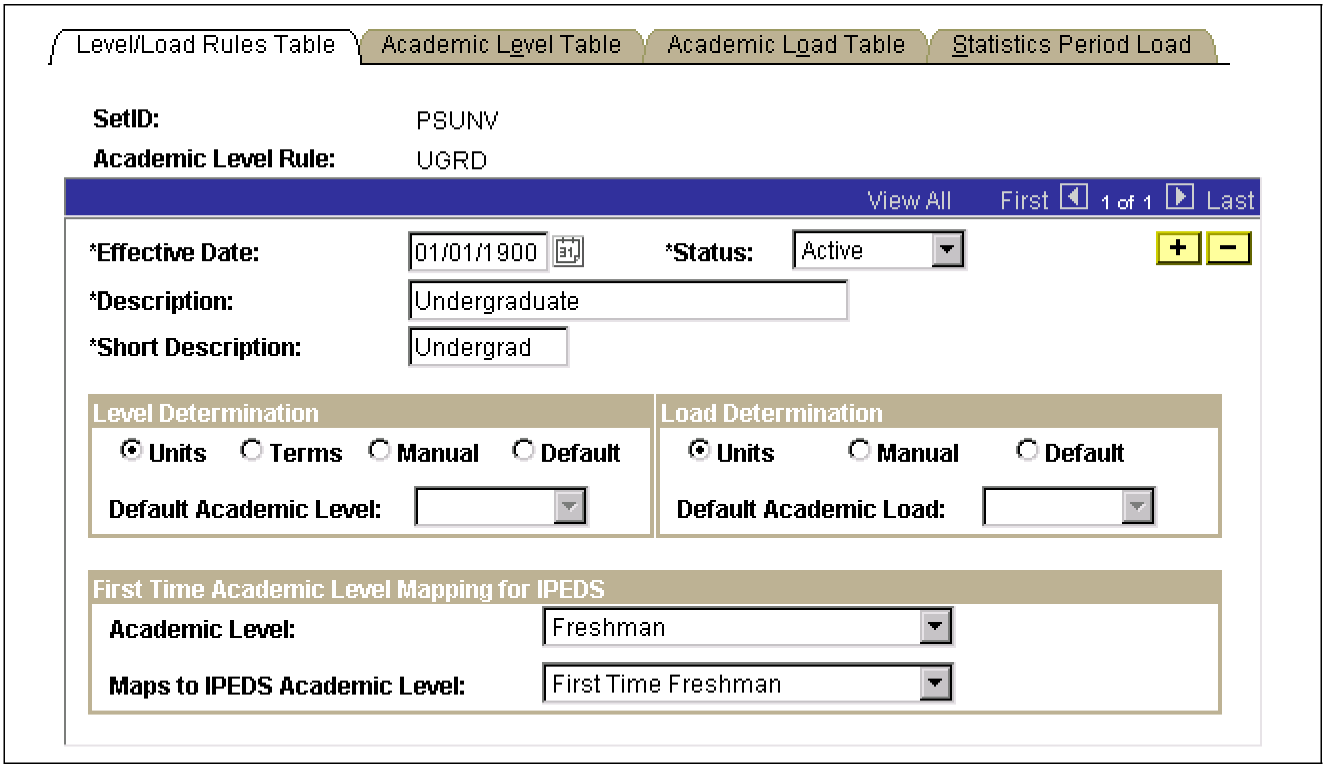
Chapter 36, "Consolidating and Reporting Academic Statistics," page 821

Pages Used to Define Academic Level and Load Determinations

Page Name	Object Name	Navigation	Usage
Level/Load Rules Table	LVL_ST_RULE_TBL	Design Student Administration, Define Student Administration, Setup, Level/Load Rules Table, Level/Load Rules Table	For each academic level rule, specify how the system processes must determine a student's academic level and academic load, and define how the Consolidate Academic Statistics process must map academic levels to Integrated Postsecondary Education Data System (IPEDS) academic levels.
Academic Level Table	ACAD_LEVEL_TBL	Design Student Administration, Define Student Administration, Setup, Level/Load Rules Table, Academic Level Table	Associate academic levels with cumulative units or terms, to link the academic levels to the corresponding National Student Loan Data System (NSLDS) loan years, and to link academic levels with federal direct lending years.
Academic Load Table	ACAD_LOAD_TBL	Design Student Administration, Define Student Administration, Setup, Level/Load Rules Table, Academic Load Table	Define academic load rules, financial aid load rules, and National Student Clearinghouse academic load rules.
Statistics Period Load	ACAD_LOAD2_TBL	Design Student Administration, Define Student Administration, Setup, Level/Load Rules Table, Statistics Period Load	For contiguous terms, define the academic load rules, National Student Load Clearinghouse academic load rules, and financial aid load rules. Contiguous terms are consecutive terms in which you combine academic load information.

Defining Academic Level and Load Determination

Access the Level/Load Rules Table page.



Level/Load Rules Table page

Status — Select a status for this academic level rule. Select *Active* when adding a new academic level rule. The *Inactive* option should only be used if your institution no longer uses this academic level rule.

Description and **Short Description** — Enter a description and short description for the academic level rule.

Level Determination

Select how the academic level is determined for a student's STDNT_CAR_TERM record during term activation (in the background or online) in the Level Determination group box. Levels can be calculated in one of four ways:

Units — Select to have the system assign an academic level based on the student's cumulative units (those designated as earn credit). The system includes articulated transfer units in this count.

Terms — Select to have the system assign academic level based on the student's cumulative terms. The system counts all terms that have a STDNT_CAR_TERM record. The system includes transfer terms that have term activation records in this count.

Manual — Select to manually assign an academic level for each student and each term on the Term Activation page. After you manually assign an academic level for the student's initial term activation record, the original value automatically copies forward (and never increments) during all future online or batch term activation processes. For some programs, this may be the behavior you want (for example, Graduate is an academic level that you may want to always assign to graduate students, regardless of their progress). On the other hand, you may have programs where you want to initially assign the value manually but also to manually update it each term.

Default Select to have the system assign an academic level for each term based on the previous STDNT_CAR_TERM record academic level.

Default Academic Level If you select the Default option, the system requires you to enter a value in the Default Academic Level field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that there is no prior STDNT_CAR_TERM record from which the system can copy the academic level. Values for this field are delivered with your system as translate values. You can modify these values.

Warning! If you select the Manual option, you must assign an academic level on the Term Activation page. Although students in programs assigned to a manual level and load rule can be included in the batch process (depending on the selection criteria used), the process assigns a system generated level value of *NST.*

Load Determination

Select how the system calculates academic load in the Load Determination group box. Loads are calculated by the number of units that a student is enrolled in, are assigned manually, or simply default from this page. Academic load can be entered manually for a student on the Term Activation page.

Units Select to have the system assign an academic load based on the student's cumulative units (those designated as earn credit). The system includes articulated transfer units in this count.

Manual Select to manually assign an academic load for each student and each term on the Term Activation page.

Default and **Default Academic Load** If you select the Default option, the system requires you to enter a value in the Default Academic Load field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that there is no STDNT_CAR_TERM record from which the system can copy the academic load. Values for this field are delivered with your system as translate values. You can modify these values.

When you run the Consolidate Academic Statistics process for an academic statistics period in which you have set the Academic Load Rule field on the Academic Statistics Period page to *Term Load Rule Applies*, and the Load Determination option on this page to *Units,* the process uses the academic load rules from the Academic Level Table page to determine a student's academic load, National Student Clearinghouse (NSLC) academic load, and financial aid load. If you have set the Load Determination field on this page to *Manual or Default,* the Consolidate Academic Statistics process uses the student's career-term record or the value in the Default Academic Load field to determine the student's academic load (regardless of the setting for the Academic Load Rule field on the Academic Statistics Period page).

First Time Academic Level Mapping for IPEDS

Use this group box to map an academic level at your academic institution to its counterpart IPEDS academic level. Academic level values are defined on the Academic Level Table page.

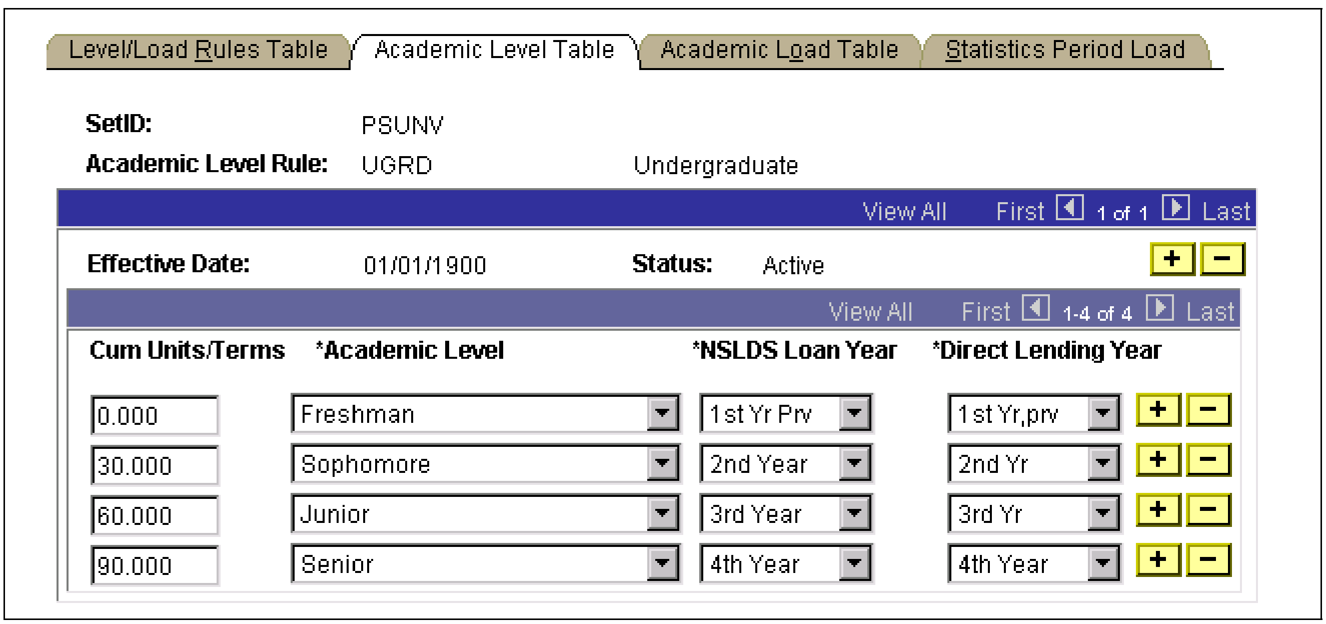
This step is necessary if you use the Consolidate Academic Statistics process to gather together the data necessary for your IPEDS reporting requirement. IPEDS asks that schools report a student as one of the following:

- *First Time Freshman, Freshman, Sophomore, Junior, Senior*
- *First Time Graduate Student, Graduate Student*
- *First Time Professional Student, Professional Student*

Warning! IPEDS academic levels are system-set to match the IPEDS requirement. We strongly recommend that you do not change these values.

Defining Level Rules

Access the Academic Level Table page.



Academic Level Table page

Cum Units/Terms (cumulative units/terms)
Enter the minimum number of cumulative units or terms the system requires before it assigns a student to a corresponding academic level. The system only uses these values if you select Units or Terms on the Level/Load Rules Table page.

Academic Level
Select an academic level for each increment of cumulative units or terms that you want to associate with this level and load rule. Values for this field are delivered with your system as translate values. You can modify these values.

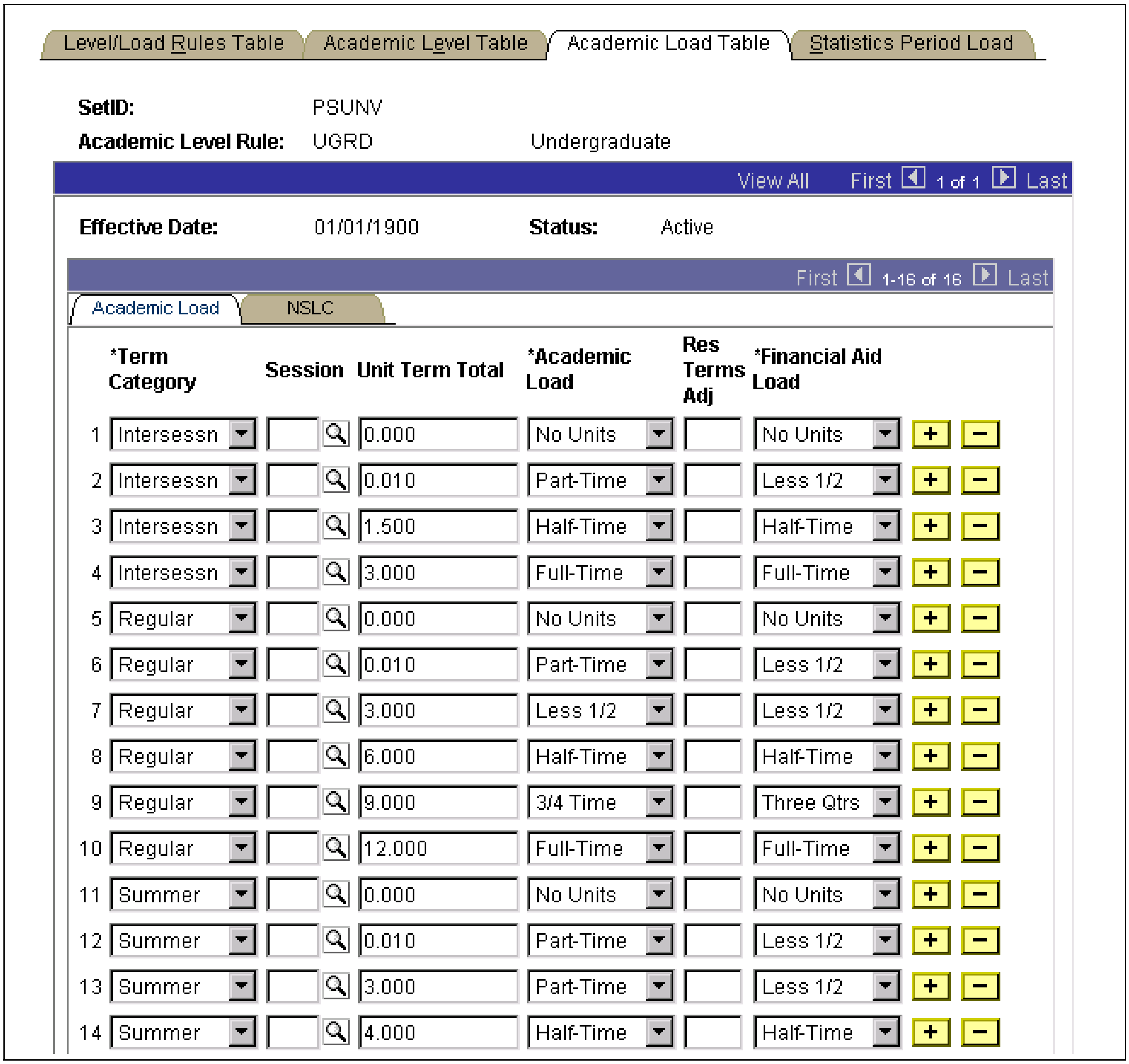
NSLDS Loan Year (National Student Loan Data System loan year) and **Direct Lending Year**

Select the NSLDS loan year and direct lending year values that correspond to each academic level you define.

The PeopleSoft Financial Aid application references these values during the FA Term Build (financial aid term year) process.

Defining Load Rules

Access the Academic Load Table page.


Level/Load Rules Table | Academic Level Table | Academic Load Table | Statistics Period Load

SetID: PSUNV

Academic Level Rule: UGRD Undergraduate

View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

First 1-16 of 16 Last

Academic Load | NSLC

	*Term Category	Session	Unit Term Total	*Academic Load	Res Terms Adj	*Financial Aid Load
1	Intersessn		0.000	No Units		No Units
2	Intersessn		0.010	Part-Time		Less 1/2
3	Intersessn		1.500	Half-Time		Half-Time
4	Intersessn		3.000	Full-Time		Full-Time
5	Regular		0.000	No Units		No Units
6	Regular		0.010	Part-Time		Less 1/2
7	Regular		3.000	Less 1/2		Less 1/2
8	Regular		6.000	Half-Time		Half-Time
9	Regular		9.000	3/4 Time		Three Qtrs
10	Regular		12.000	Full-Time		Full-Time
11	Summer		0.000	No Units		No Units
12	Summer		0.010	Part-Time		Less 1/2
13	Summer		3.000	Part-Time		Less 1/2
14	Summer		4.000	Half-Time		Half-Time

Academic Load Table page: Academic Load tab

Depending on the option that you select for an academic statistics period, the Consolidate Academic Statistics process uses these rules to determine a student's academic load.

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Term Category

Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values.

Note. Map every term category at your institution regardless of your load determiner (units, default, or manual).

Session

Select the session type for the term category if you have more than one session in a term category, and the sessions have different academic loads. For example, a summer session term type might have a ten-week session, a twelve-week session, and two six-week sessions. Your institution might not calculate the academic load for the twelve-week session and the six-week sessions in the same way.

Note. A field edit disables the ability to use any term category in combination with a session number of *1* (regular session). The system assumes that a cleared Session field equals *1* (regular session).

Unit Term Total

Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.

Academic Load

Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values.

Res Terms Adj (residence terms adjust)

Enter the residence terms adjust value for each term category and session type to determine what constitutes a full term based on a student's academic load. In the exhibit, a part-time academic load is considered to be worth 50 percent of a full term, a three-quarter time academic load is considered to be worth 75 percent of a full term, and a full-time academic load is considered to be worth 100 percent of a full term. When a student is term activated, the student's approved academic load is used to determine the value of the Terms of Residency field based on the residence terms adjust factor. In this example, a part-time student would have a Current In Residence Terms setting of 0.50 and a full-time student would have a setting of 1.00.

The system obtains the Current in Residence Terms value from the Term Activation - Terms in Residence field.

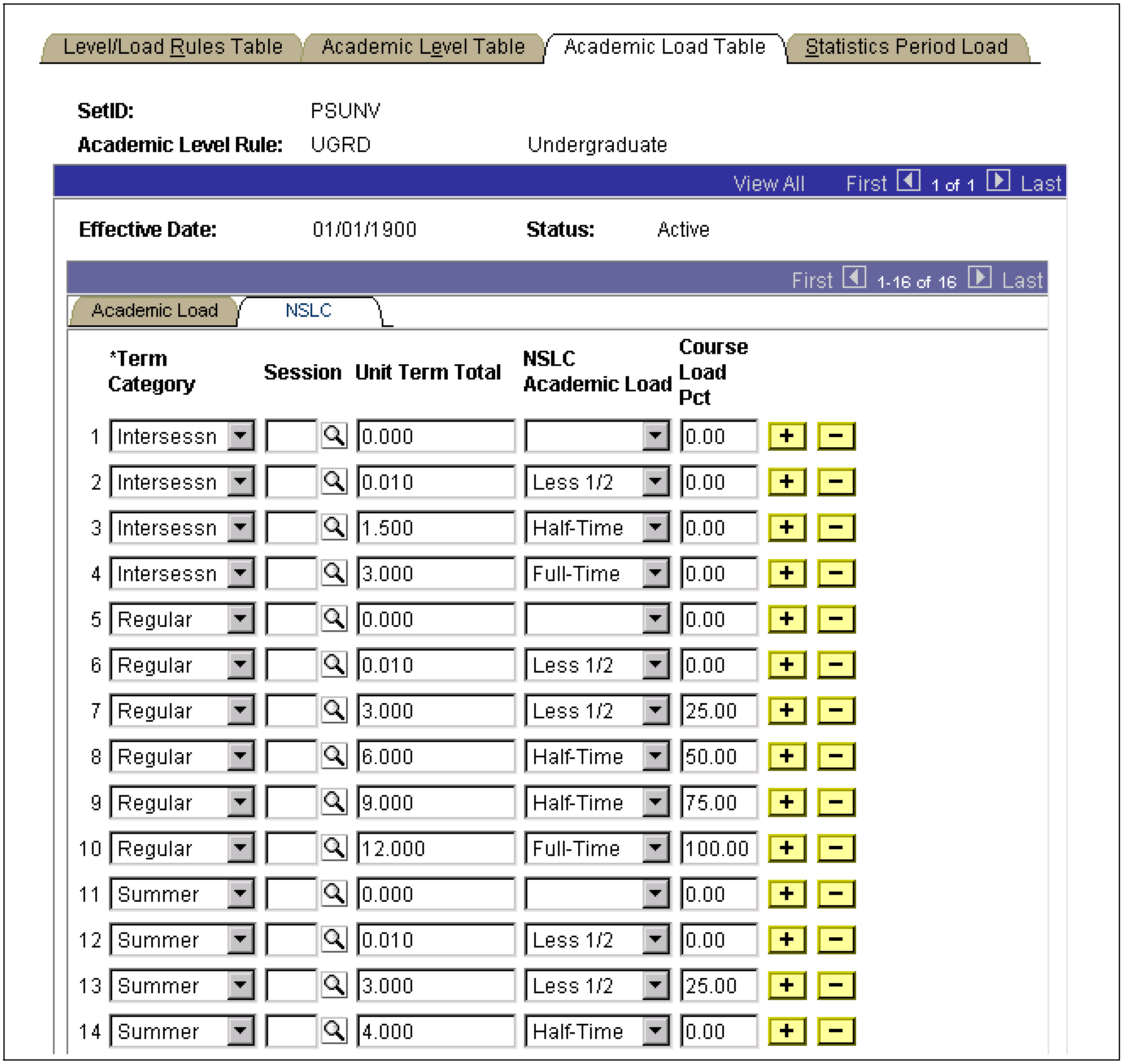
See *PeopleSoft 8 SP1 Financial Aid PeopleBook*, "Managing Financial Aid Terms".

Financial Aid Load

Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values.

NSLC Tab

Select the NSLC tab.



Level/Load Rules Table | Academic Level Table | Academic Load Table | Statistics Period Load

SetID: PSUNV

Academic Level Rule: UGRD Undergraduate

View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

First 1-16 of 16 Last

Academic Load | NSLC

	*Term Category	Session	Unit Term Total	NSLC Academic Load	Course Load Pct
1	Intersessn		0.000		0.00
2	Intersessn		0.010	Less 1/2	0.00
3	Intersessn		1.500	Half-Time	0.00
4	Intersessn		3.000	Full-Time	0.00
5	Regular		0.000		0.00
6	Regular		0.010	Less 1/2	0.00
7	Regular		3.000	Less 1/2	25.00
8	Regular		6.000	Half-Time	50.00
9	Regular		9.000	Half-Time	75.00
10	Regular		12.000	Full-Time	100.00
11	Summer		0.000		0.00
12	Summer		0.010	Less 1/2	0.00
13	Summer		3.000	Less 1/2	25.00
14	Summer		4.000	Half-Time	0.00

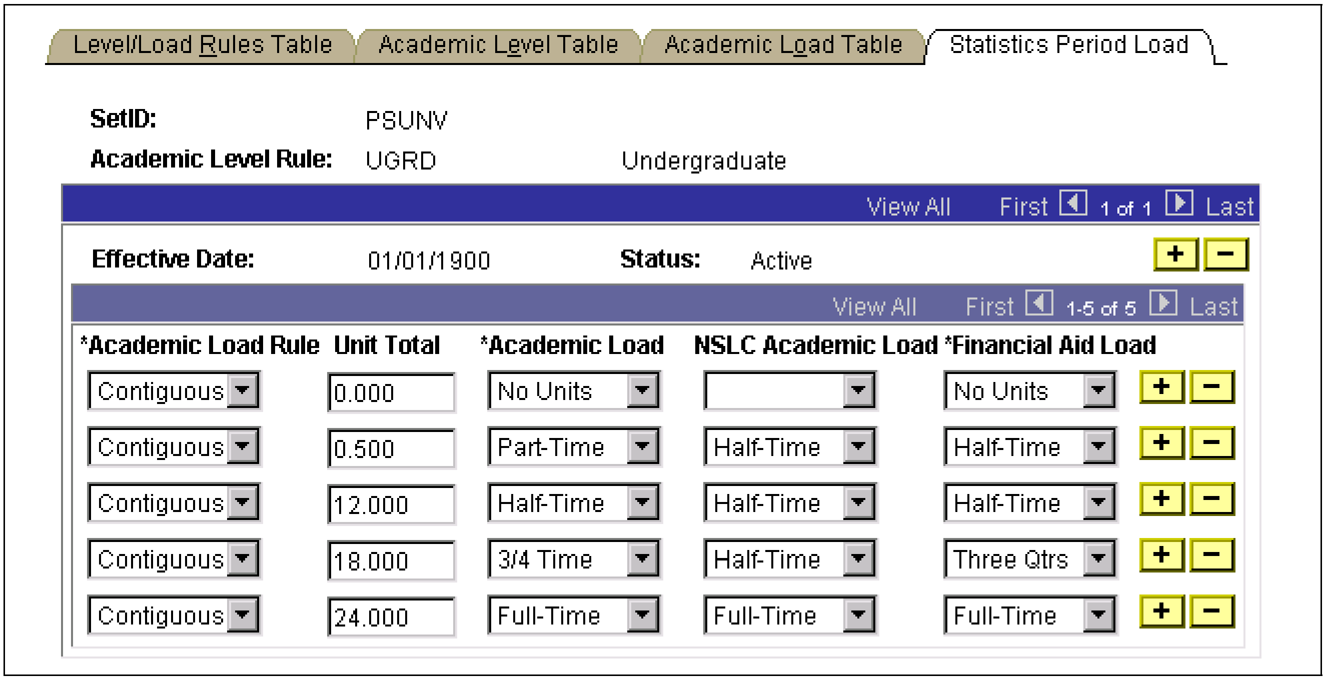
Academic Load Table page: NSLC tab

NSLC Academic Load (National Student Clearinghouse academic load)
Select the academic load value that your institution reports to the NSLC. Values for this field are delivered with your system as translate values. You can modify these values.

Course Load Pct (course load percent)
Enter the course percentage for the NSLC academic load. For example, if you have selected *Half-Time* for your NSLC academic load, enter *50* (50 percent).

Defining Contiguous Term Load Rules

Access the Statistics Period Load page.



Statistics Period Load page

Depending on the option that you select for an academic statistics period, the Consolidate Academic Statistics process uses the rules on this page to determine a student's academic load.

Note. For the Consolidate Academic Statistics process to effectively combine a student's academic loads for contiguous terms, be sure that you define contiguous term academic load rules for every academic level rule at your institution.

Academic Load Rule

Select *Contiguous* if you plan to use the Consolidated Academic Statistics process to combine a student's academic load unit totals for consecutive terms. If you do not use the Consolidated Academic Statistics process, clear this field and the other fields on this page.

Unit Total

Enter the unit total for each contiguous term academic load rule. The unit term total represents the number of units that a student must take to qualify for the academic loads that you define on any given row of this page.

Academic Load

Select the academic load value that corresponds to the unit total for the row. Values for this field are delivered with your system as translate values. You can modify these values.

NSLC Academic Load (National Student Clearinghouse academic load)

Select the NSLC academic load value that corresponds to the unit total for the row. The NSLC Extract process uses the NSLC academic load for NSLC reporting purposes. Values for this field are delivered with your system as translate values. You can modify these values.

Financial Aid Load

Select the financial aid load value corresponding to the unit total for the row. The financial aid load is the financial aid equivalent of the academic load for the row. Values for this field are delivered with your system as translate values. You can modify these values.

Setting Up Unit Conversions

This section discusses how to set up unit conversion rules within your institution.

Understanding Unit Conversions

If students at your institution take classes outside of their current career, you should define unit conversions. It is especially critical that you do this if some careers are on a quarter system, and other careers are on a semester system. (For example, if an MBA student takes a law course, but the MBA program is on a quarter system and the law program is on a semester system.) The system also uses the unit conversion rules when you process internal transfer credit for students, which can include students with internal coursework that transfer from one career to another career, or students with internal coursework that transfer from one program to another program.

Prerequisites

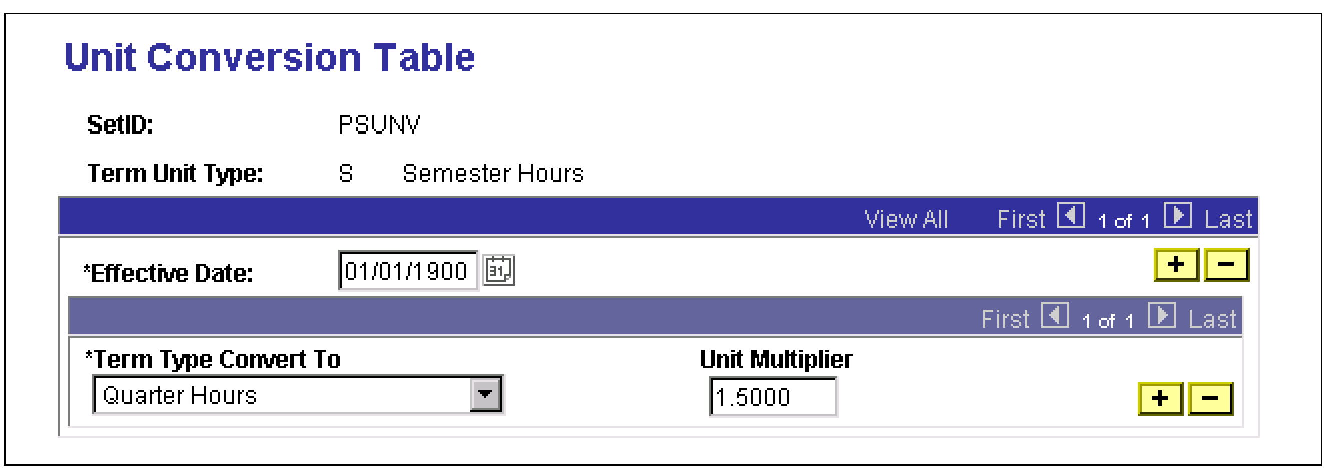
If you want to use term types other than the translate values we deliver, you must first create them in the TERM_TYPE_CONVR_TO translate table.

Pages Used to Set Up Unit Conversions

Page Name	Object Name	Navigation	Usage
Unit Conversion Table	UNIT_CONVR_TBL	Design Student Administration, Define Student Administration, Setup, Unit Conversion Table, Unit Conversion Table	Set up unit conversions within your institution.

Defining Unit Conversions

Access the Unit Conversion Table page.



Unit Conversion Table page

Term Type Convert To	The value to which you want to convert the Term Unit Type value.
Unit Multiplier	The number by which the system multiplies term unit type units, in order to convert them to the term type convert to value. For example, (term unit type units) x (unit multiplier) = (term type convert to units).

Defining Standard Meeting Patterns

Define class meeting patterns for your classes on the Standard Meeting patterns page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Designing Your Academic Structure," Defining Standard Class Meeting Patterns

Defining Modes of Instruction

This section discusses how to set up instruction mode values that you use when you define courses and schedule classes.

Pages Used to Define Instruction Mode Values

Page Name	Object Name	Navigation	Usage
Instruction Mode	INSTRUCT_MODE	Design Student Administration, Define Student Administration, Setup, Instruction Mode	Define instruction mode values.

Defining Instruction Modes

Access the Instruction Mode page.

Important! Set up an Instruction Mode value of *P* for every institution in your system. You can enter any description and short description, however we recommend using "In Person" for both fields, respectively. The system uses this value as a default for the Instruction Mode field on the Schedule of Classes — Basic Data page (when you enter the page in *Add* mode). In addition, you can generate rosters only for those classes with an Instruction Mode field value of *P* on the Basic Data page.

Effective Date and **Status**	The effective date determines when the status you select is valid. The active effective date must be equal to or less than the effective date of the course component to which you assign the instruction mode.
Description	The description of the instruction mode. The system displays this value on the Course Catalog report, the Schedule of Classes report, as well as on the Course Catalog component and Schedule of Classes online pages.

Short Description	The short description of the instruction mode.
Print On Course Catalog	Select to display the instruction mode on the course catalog report.
Print On Schedule of Classes	Select to display the instruction mode description on the schedule of classes report, as well as on the online schedule of classes.
Print On Transcript	There is no programming attached to this field.

CHAPTER 3

Setting Up Repeat Checking

This chapter provides an overview of repeat checking functionality and discusses how to:

- Define repeat schemes and repeat codes.
- Define repeat rules.
- Set up repeat checking for academic institutions.
- Set up repeat checking for academic careers.
- Set up repeat checking for academic programs.

Understanding Repeat Checking Functionality

The PeopleSoft Student Records repeat checking functionality is a flexible, fully-integrated feature that updates students' academic statistics based on an academic institution's course repeat policies. Through the repeat schemes, repeat codes, and repeat rules that your institution defines, the functionality regulates academic statistics normally governed by the grading scheme.

The repeat checking functionality enables you to manage repeats at the beginning, middle, and end of students' coursework. The functionality gives you the ability to do the following:

- Identify automatically that students are repeating courses when students enroll in classes (front-end processing).
- Identify automatically that students are repeating courses when you grade the student through the Enrollment Request page (back-end processing).
- Identify automatically that students are repeating courses when you post transfer credit (back-end processing).
- Identify in batch that students are repeating courses by running the Repeat Rule Checking process once per term through the Repeat Checking page.
- Identify repeats manually by assigning repeat codes to students' records on the Student Enrollment page, Enrollment Request page, or Quick Enrollment page.

The repeat checking functionality consists of the two following processes, both of which are fully integrated with each other:

- The Allowable Repeats process, which enables you to define rules on the Catalog Data page of the Course Catalog component that regulate whether a student can repeat a course or course topic for credit, and if so, how many total units and total completions the student can attempt.
- The Repeat Rule Checking process, which takes effect only after a student exceeds either repeat maximum in the course catalog.

To use the repeat checking functionality, your institution must first define repeat schemes, repeat codes, and repeat rules.

- *Repeat schemes* are the set of valid repeat codes that an academic institution can use to define the repeat rules for an academic career.
- *Repeat codes* are the settings that will adjust academic statistics.

  Repeat codes can adjust academic statistics in the following two ways: they prevent the system from including repeated coursework in a student's GPA, and they prevent the system from including repeated coursework in a student's academic level. If the student violates the repeat rule, the Repeat Rule Checking process assigns the appropriate repeat codes to the student's enrollment record.
- *Repeat rules* are those that inform the Repeat Rule Checking process of when a student's repeated coursework is in violation of the repeat policies of an academic career or academic program.

  You can assign to academic careers and academic programs only the repeat rules that are valid for the repeat scheme of the academic career.

Once you have defined these elements, you must link the repeat rules to academic careers and, if desired, to academic programs in which you do not want to use the same rule as the academic career. Lastly, you must specify when you want the Repeat Rule Checking process to run at the academic institution, academic career, and academic program levels. These controls enable you to turn on and off automatic repeat checking during enrollment and grade input. They also enable you to temporarily suspend automatic repeat checking during peak enrollment and grade input periods.

Once your institution defines these elements and connects them to academic careers and academic programs, the repeat checking functionality is ready to use. When the Repeat Rule Checking process executes, it looks for a matching pair of course IDs or courses deemed equivalent (on the Course Equivalencies page). When the process finds a matching pair it uses the appropriate repeat rule to determine whether the repeated class is in violation of the rule. If so, the process assigns the designated repeat code to the student's enrollment record for the repeated class. You can view the assigned repeat code on the Enrollment Request page or the Quick Enrollment page. Depending on your setup, the repeat code can prevent a repeated course from counting towards a student's academic level or GPA.

The Allowable Repeats process and Repeat Rule Checking process set the repeat candidate flag (REPEAT_CANDIDATE) on the student's enrollment record (STDNT_ENRL) to Y or N for all components of a class. The COBOL process sets the flag to *Y* for all classes identified as repeat candidates as long as the following conditions are met:

- You must set up front-end repeat checking to issue warning messages whenever the COBOL process encounters a repeat candidate.
- You must process the enrollment transaction through the enrollment engine.

The COBOL process does not validate enrollment transactions processed through the Enrollment component and therefore does not issue a warning repeat message. For enrollment transactions processed through the Enrollment component, the system sets the repeat candidate flag on the student's enrollment record to *N,* even for repeated classes. In cases where you do not want a class enrollment considered as a repeat candidate by back-end repeat checking, you should process the class enrollment through the enrollment component.

On the Taxonomy page of the Academic program Table component, if you set the Process on Enrollment field to No and the Course Catalog Repeat Messages field to Warning, the Allowable Repeats process is in force. When students submit enrollment requests and the student exceeds the total completions allowed for the class as determined by the Course Catalog Detail page, the will receive a warning message.

If you set the Process on Enrollment field to Yes, the Course Catalog Repeat Messages field automatically sets to Warning and becomes unavailable for edit. The Repeat Rule Checking process is in force and on enrollment requests looks to the repeat rule setup for messaging rules.

For the process to correctly and consistently set the repeat candidate flag to Y, you must set the Enrollment Message field to Warning for the repeat rule on the Repeat Rule 2 page and for the every detail rule on the Repeat Rule Detail 1 page. If you set the Enrollment Message field to Ignore, the process does not send a message for that rule and, even if the course is a repeat candidate, the process sets the repeat candidate flag to N provided that it doesn't violate other repeat rules.

See Also

Chapter 16, "Performing Repeat Checking," page 343

Defining Repeat Schemes and Repeat Codes

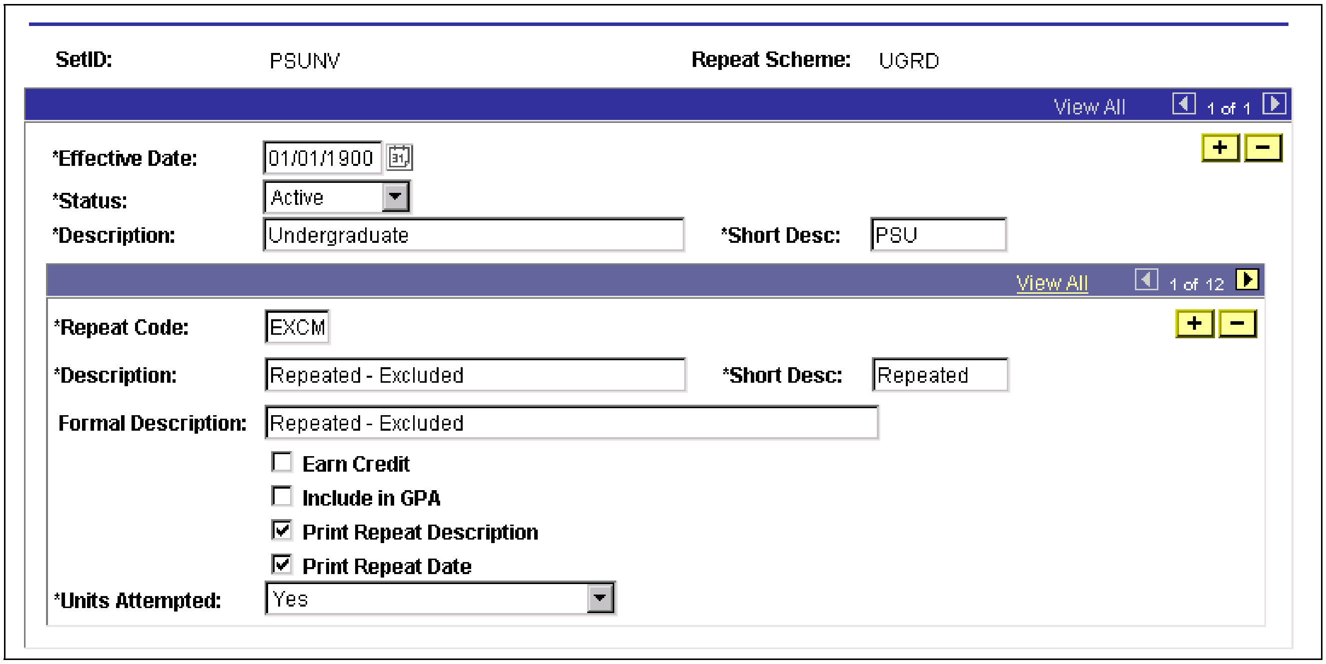
This section discusses how to create repeat schemes and the repeat codes within each scheme.

Page Used to Define Repeat Schemes and Repeat Codes

Page Name	Object Name	Navigation	Usage
Repeat Scheme Table	REPEAT_SCHEME_TBL	Design Student Administration, Define Student Records, Setup, Repeat Scheme Table	Create repeat schemes and the repeat codes within each scheme.

Creating Repeat Schemes and Codes

Access the Repeat Scheme Table page.



Repeat Scheme Table page

The purpose of repeat codes is to adjust students' academic statistics appropriately when students repeat courses, rather than having the system calculate statistics by using the grading scheme.

Repeat Code

Enter a repeat code for this repeat scheme. If assigned, this code appears on a student's enrollment record. You can view codes that are assigned to a student's enrollment records on the Student Enrollment 1.

Earn Credit

Select to indicate that a student with this repeat code on a class enrollment record can earn credit for the class. To prevent a repeated course from counting toward a student's academic level, clear this check box.

Include in GPA (include in grade point average)

Select to indicate that a student with this repeat code on a class enrollment record can have the class included in the grade point average calculation. To prevent a repeated course from being calculated in the student's grade point average, clear this check box.

Print Repeat Description

Select to have the system print the formal description of this repeat code on the student's transcript when applicable.

Print Repeat Date

Select to print the date that the student completed the repeated course on the student's transcript.

Units Attempted

Select from the following choices a value to indicate how the units attempted from a repeated course count towards a student's academic statistics when this repeat code is assigned to the student's class enrollment record. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Yes: Indicates that a student with this repeat code on a class enrollment record can have the class included in units attempted.

No: Prevents the units from a repeated course from counting toward a student's academic statistics.

In Progress: Units in progress will be used for courses coded with this repeat code.

Defining Repeat Rules

This section discusses how to do the following tasks, and concludes with an example repeat rule:

- Describe repeat rules.
- Define conditions for repeat rules.
- Define repeat rule sequences.
- Define conditions for repeat rule sequences.
- Designate process actions for repeat rule sequences.

If you want to run repeat checking at the academic career level but want to exclude an academic program without having to select each academic program for which you do want to run repeat checking, you can set up a repeat rule called NONE. After naming the repeat rule, complete the required fields in the component and attach it to the academic program that you want to exclude. When the Repeat Rule Checking process sees the NONE repeat rule it does not run for that academic program.

Pages Used to Define Repeat Rules

Page Name	Object Name	Navigation	Usage
Repeat Rule	REPEAT_RULE	• Design Student Administration, Define Student Records, Setup, Repeat Rule, Repeat Rule • Manage Student Records, Manage Academic Records, Setup, Repeat Rule, Repeat Rule	Describe the repeat rules that you will later link to academic careers and academic programs.

Page Name	Object Name	Navigation	Usage
Repeat Rule 2	REPEAT_RULE2	• Design Student Administration, Define Student Records, Setup, Repeat Rule, Repeat Rule2 • Manage Student Records, Manage Academic Records, Setup, Repeat Rule, Repeat Rule2	Define the total attempts and units allowed for course to which the repeat rule applies. Use this page also to define the repeat code that the Repeat Rule Checking process assigns to a student's class enrollment record if the student violates the repeat rule. You can further use this page to select an enrollment message in case the student exceeds the total attempts or units allowed and to select exempted repeat codes to allow for overrides of the total attempts and units allowed maximums.
Repeat Rule Detail 1	REPEAT_RULE_DTL	• Design Student Administration, Define Student Records, Setup, Repeat Rule, Repeat Rule Detail 1 • Manage Student Records, Manage Academic Records, Setup, Repeat Rule, Repeat Rule Detail 1	Define further a rule when your institution restricts the number of times a student can repeat a course within a certain grade range. This page describes the *prior* course in the matched pair of repeat courses. For example, a student can only repeat courses with F or D grades (grade points between 0.00 and 1.999) twice.
Repeat Rule Detail 2	REPEAT_RULE_DTL2	• Design Student Administration, Define Student Records, Setup, Repeat Rule, Repeat Rule Detail 2 • Manage Student Records, Manage Academic Records, Setup, Repeat Rule, Repeat Rule Detail 2	Define what the repeat checking rule should do, based on the value of a preexisting repeat code on the current course attempt.
Repeat Rule Detail 3	REPEAT_RULE_DTL3	• Design Student Administration, Define Student Records, Setup, Repeat Rule, Repeat Rule Detail 3 • Manage Student Records, Manage Academic Records, Setup, Repeat Rule, Repeat Rule Detail 3	Designate the codes that the Repeat Rule Checking process should set on both the enrollment record for the current course and the enrollment record for the other previously attempted course, depending on which course attempt has the best grade.

Describing Repeat Rules

Access the Repeat Rule page.

Your repeat rules are keyed by the academic careers, so your description might be *Undergraduate Repeat Rules, Fine Arts Repeat Rules, Graduate Repeat Rules,* and so on.

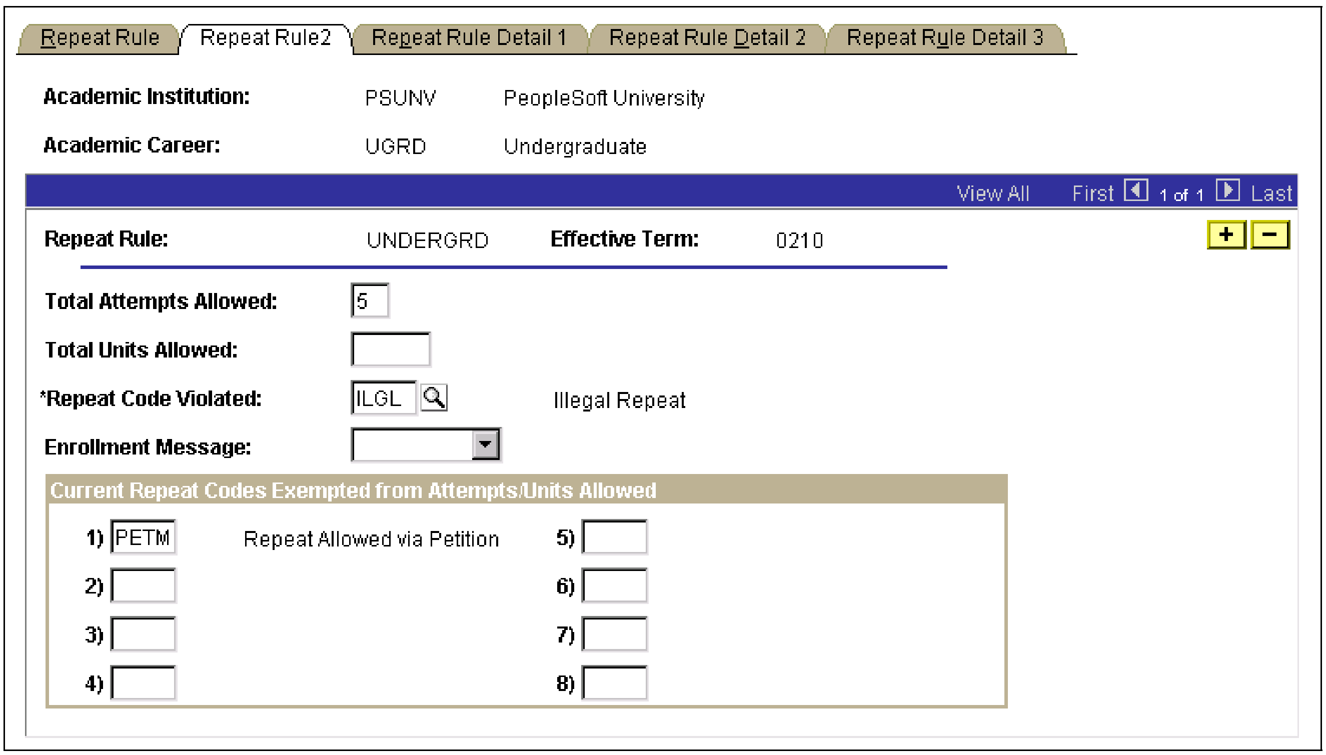
Repeat Rule Enter the code for this repeat rule. You can attach this code to academic careers on the Repeat Checking page (Academic Career Table component) and to academic programs on the Taxonomy page (Academic Program Table component).

Effective Term Select the term that this repeat rule becomes effective. Only terms associated with the academic career are available. The system validates the repeat rule by effective term.

Long Description For information purposes only.

Defining Conditions for Repeat Rules

Access the Repeat Rule2 page.



Repeat Rule 2 page

Total Attempts Allowed Enter the total number of attempts that a student can take for a course to which this repeat rule applies. The value you enter should include all attempts of the course, including the first attempt.

Total Units Allowed Enter the total number of units that a student can take for a course to which this repeat rule applies. The value you enter should include all units taken for the course, including the units of the first attempt.

You can set both total attempts and total units maximums, or you can set just one. If you set both maximums, the Repeat Rule Checking process uses the first maximum that it reaches. If you set neither maximum, the process uses the system defaults *99* for total attempts and *999* for total units.

Repeat Code Violated

Select the repeat code that the Repeat Rule Checking process assigns to a student's enrollment record if the student violates the repeat rule. When the Repeat Rule Checking process runs, it checks the repeat rule to verify if the student has exceeded either the total attempts allowed or the total units allowed. If so, the process assigns, to the enrollment record of the student's current course attempt, the violated repeat code that you define here.

For example, if your organization allows students only to repeat a course twice, regardless of any grades the student receives, you would enter *3* in the Total Attempts Allowed field—one for the initial enrollment plus two additional repeated attempts. Then, if the student attempts to enroll in the course and violates the total attempts allowed for the rule, the process assigns the *Repeat Code Violated* field value to the course.

If your organization chooses to have no restriction on the number of times a student can repeat a course, or if your organization restricts only the number of times that a student can repeat a course for a certain grade, then use the total attempts allowed default value of *99.* You are required to specify a *Repeat Code Violated* field value.

Enrollment Message

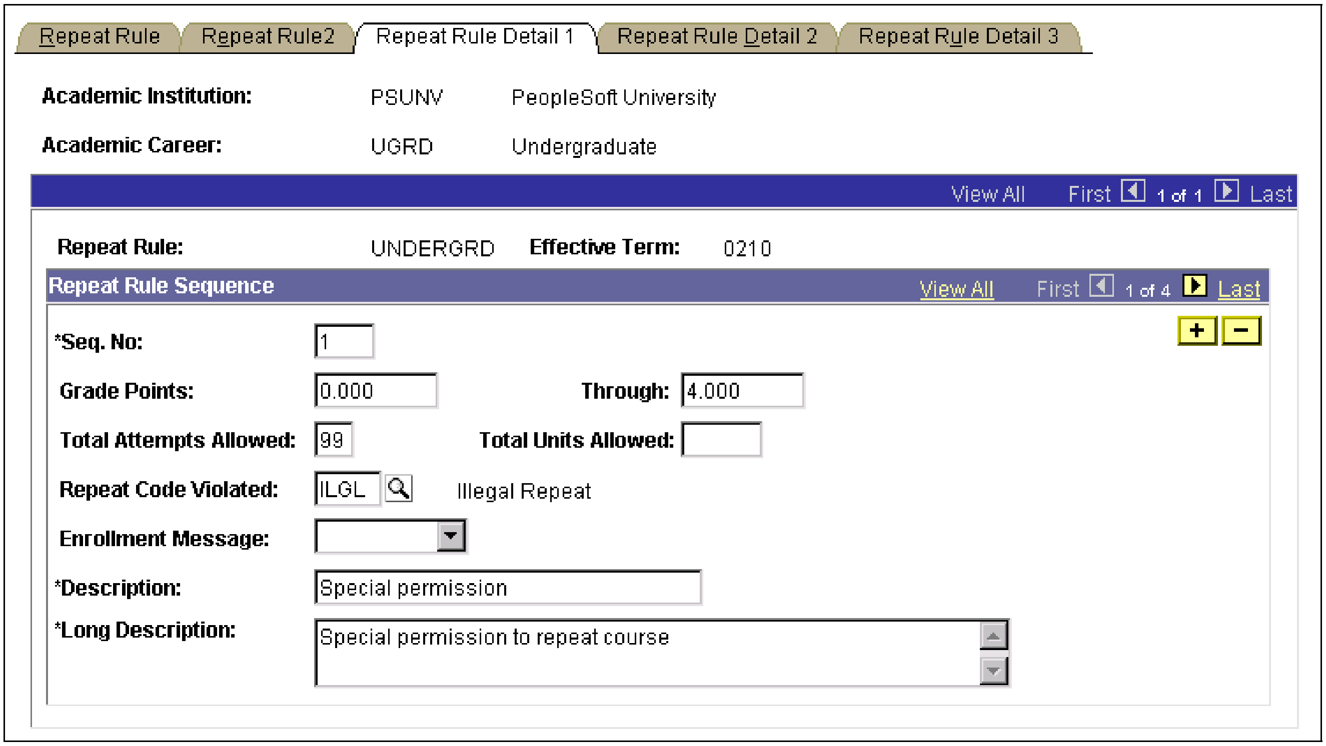
If a student's enrollment request causes the student to exceed the total attempts or units allowed, the Repeat Rule Checking process looks to the enrollment message value that you select to determine the action the enrollment process takes to alert the student. Select *Error* to stop the enrollment process and alert the student by displaying an error message, or select *Warning* to alert the student by displaying a warning message about the possible consequences of continuing with the enrollment. The enrollment message applies only to repeat checking on enrollment (front end). Select *Ignore* if you do not want the Repeat Rule Checking process to issue any message.

Current Repeat Codes Exempted from Attempts/Units Allowed

Allows for exemptions to the repeat rule parameters in the event that a student's enrollment record contains one of the codes that you enter in here. In our example, if the student's enrollment record contained the *PETM* (repeat allowed by petition) repeat code, the Repeat Rule Checking process would not consider that enrollment record in violation of a repeat rule. In addition, the back-end Repeat Rule Checking process allows an override of the attempts/units allowed maximum for current courses carrying the exemption code. You can assign repeat codes to a student's enrollment record on the Enrollment Request, Quick Enrollment, or Student Enrollment 1 pages.

Defining Repeat Rule Sequences

Access the Repeat Rule Detail 1 page.



Repeat Rule Detail 1 page

Seq No (sequence number)

Enter the sequence number for this detail line of the repeat rule. You can have as many rule detail lines as necessary. The sequence number tells the system the order in which to evaluate the detail lines of the repeat rule.

For example, you might have four detail lines: one for special permission of all grades; one for the repeats of F grades (those grade points between 0.000 and 0.999), which are permitted twice; one for repeats of D grades (those with grade points between 1.000 and 1.999), which are permitted once; and one for repeats of all other grades (those with grade points between 2.000 and 4.000).

Important! The sequence number of the detail lines is crucial because as soon as the Repeat Rule Checking process (SRPCERPT) finds a rule detail line that applies, it ignores subsequent detail lines.

Grade Points

Enter the lowest value in a range of grade points per unit for which the detail line of the repeat rule applies. For example, at PSUNV we use a 4-point scale. Therefore, when we enter grade points 0.00 through 0.999 for our first detail line of the repeat rule, the system applies the detail line only to F grades. When we enter grade points 0.00 to 4.00 for our first detail line of the repeat rule, the system applies this detail line to all grades.

Through

Enter the highest value in a range of grade points per unit for which the detail line of the repeat rule applies.

Total Attempts Allowed

Enter the number of attempts that a student is allowed within this grade point range. This number includes the original attempt and repeat attempts.

In the example on the page above, students can repeat F grades twice, therefore the total attempts allowed in the range is *3,* two repeats attempts plus one original attempt.

Total Units Allowed

Enter the total units for which a student is allowed to receive a grade within this grade point range. For example, in the example on the page above, a student can receive an F grade on a repeated class only one time or for 6 Units (whichever comes first) before the student violates the detail line of the repeat rule.

Repeat Code Violated

Select the repeat code that the Repeat Rule Checking process assigns to a student's enrollment record if the student violates this detail line of the repeat rule. When the Repeat Rule Checking process runs, it checks the repeat rule to verify if the student has exceeded either the total attempts allowed or the total units allowed for this detail line. If so, the process assigns, to the enrollment record of the student's current course attempt, the repeat code violated that you define here. Define repeat code values on the Repeat Scheme Table page.

On the preceding page, the system posts the repeat code *ILGL* (illegal) if students attempt a course more than 3 times with an F grade. On the fourth attempt, the system posts the *ILGL* code to the fourth enrollment attempt.

Enrollment Message

If a student's enrollment request causes the student to exceed the total attempts or units allowed for this detail line of the repeat rule, the Repeat Rule Checking process checks the enrollment message value that you select to determine the action the enrollment process takes to alert the student. Select *Warning* to alert the student by displaying a warning message about the possible consequences of continuing with the enrollment. The enrollment message applies only to repeat checking on enrollment (front end). Select *Ignore* if you do not want the Repeat Rule Checking process to issue any message.

Description

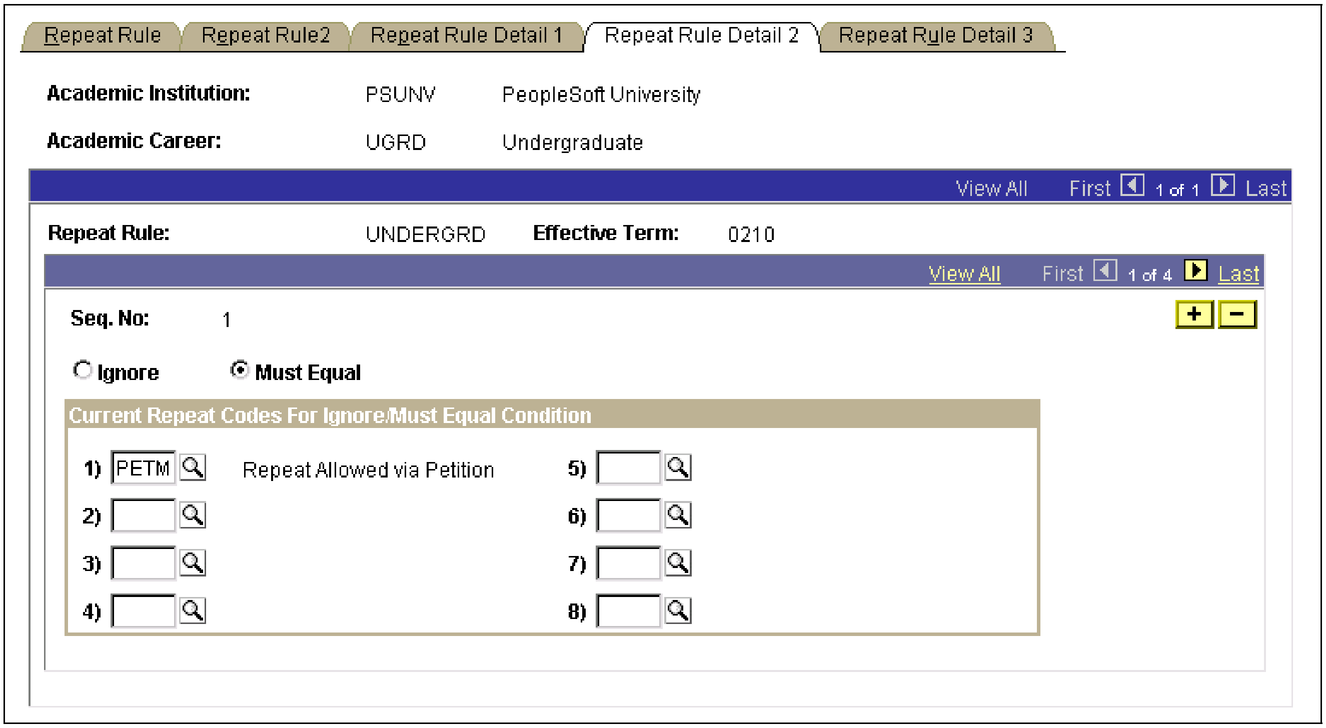
Enter the description for this detail line of the repeat rule. This field is for information purposes only.

Long Description

Enter the long description for this detail line of the repeat rule. This field is for information purposes only.

Defining Conditions for Repeat Rule Sequences

Access the Repeat Rule Detail 2 page



Repeat Rule Detail 2 page

Sometimes a course that the student repeats will already have a repeat code assigned. For a student's current course attempt, a repeat code might have been assigned manually during the enrollment process on either the Student Enrollment 1 page, the Quick Enrollment page, or the Enrollment Request page. Use this page in conjunction with the rules that you define on the Repeat Rule Detail 3 page.

Ignore

Select to have the Repeat Rule Checking process (SRPCERPT) ignore this detail line of the repeat rule when evaluating the current course attempt *if* the repeat code already present for the current course matches any of the repeat code values that you select in the Current Repeat Codes For Ignore/Must Equal Condition group box fields.

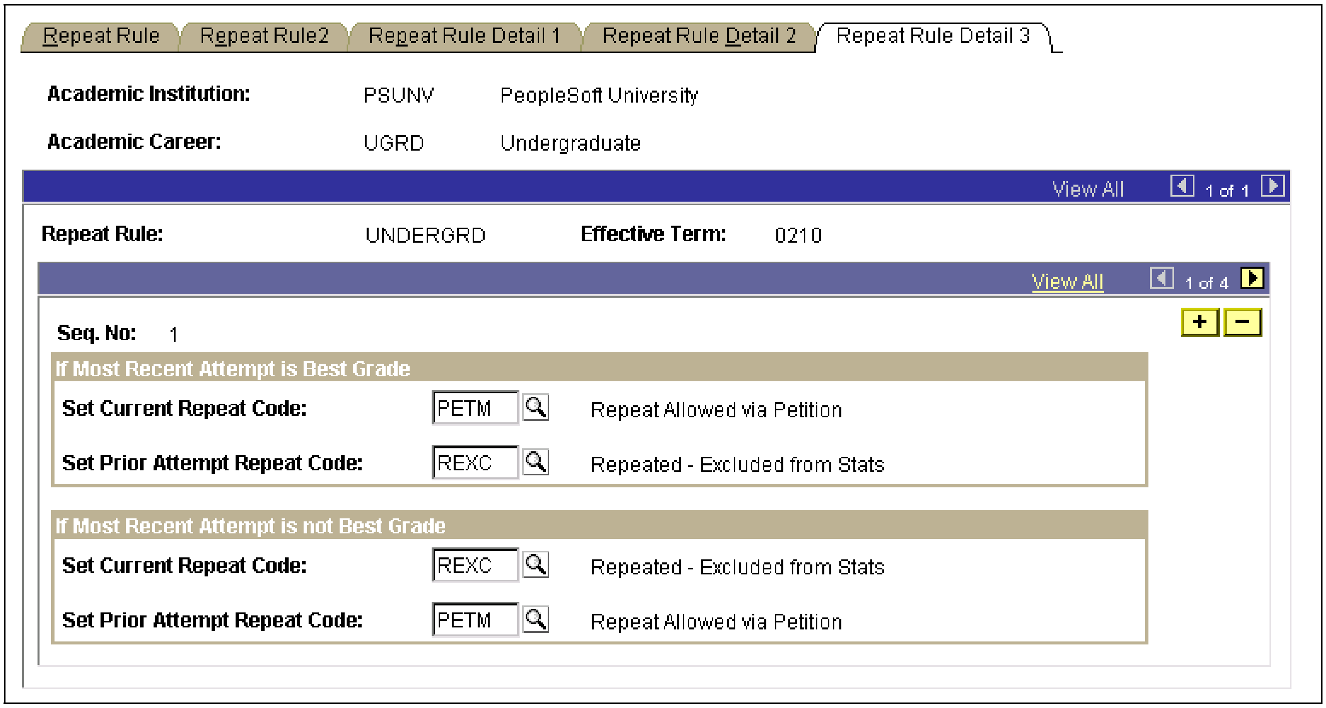
Must Equal

Select to have the Repeat Rule Checking process consider this detail line of the repeat rule when evaluating the current course attempt *only if* the repeat code already present for the current course matches any of the repeat code values that you select in the Current Repeat Codes For Ignore/Must Equal Condition group box fields.

In the example shown on the page above, the Repeat Rule Checking process does apply this detail line of the repeat rule if the current course attempt is coded *PETM,* even if the course meets the criteria on the Repeat Rule Detail 1 page. The process proceeds to the sequential detail line of the repeat rule.

Designating Process Actions for Repeat Rule Sequences

Access the Repeat Rule Detail 3 page.



Repeat Rule Detail 3 page

Enter codes for each repeat rule detail line that you have created for the repeat rule. The Repeat Rule Checking process assigns these repeat codes only if the student's grade points on the prior course falls within the range that you specify on the Repeat Rule Detail 1 page.

If Most Recent Attempt is Best Grade

In the If Most Recent Attempt is Best Grade group box, select the appropriate repeat codes for the Repeat Rule Checking process to post to a student's enrollment record if the most recent attempt of the course has the best grade.

Set Current Repeat Code Select a repeat code for the most recent attempt. The Repeat Rule Checking process assigns the repeat code that you select here to the student's most recent attempt of the course.

Set Prior Attempt Repeat Code Select the repeat code for the prior attempt. The Repeat Rule Checking process assigns the repeat code that you select here to the student's previous attempt of the course.

In our example, if the current attempt of the course has a better grade than D, the system codes the current attempt of the course with *PETM,* and the prior attempt of the course with *REXC.*

If Most Recent Attempt is not Best Grade

In the If Most Recent Attempt is not Best Grade group box, select the appropriate repeat codes for the system to post to a student's enrollment record if the most recent attempt of the course does not have the best grade.

Set Current Repeat Code Select a repeat code for the most recent attempt. The Repeat Rule Checking process assigns the repeat code that you select here to the student's most recent attempt of the course.

Set Prior Attempt Repeat Code

Select the repeat code for the prior attempt. The Repeat Rule Checking process assigns the repeat code that you select here to the student's previous attempt of the course.

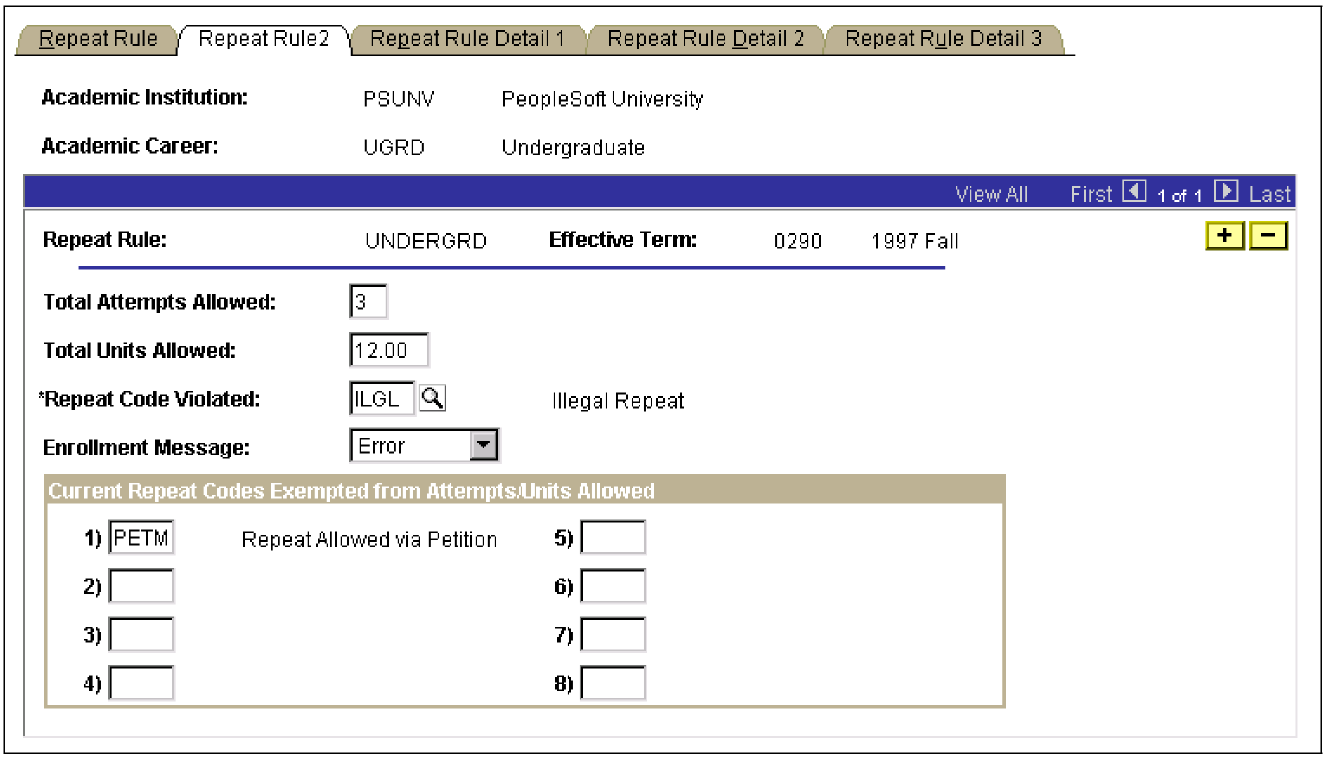
In our example, if the current attempt is a lower grade, then the system codes the current attempt of the course with *REXC,* and the prior attempt of the course with *PETM.*

See Also

Chapter 16, "Performing Repeat Checking," Running the Repeat Rule Checking Process, page 345

Reviewing an Example Repeat Rule

The following is an example of how your institution might set up a repeat rule with two detail lines. Let's define a repeat rule where students can repeat a course twice only or earn up to 12 units in a repeated course. In addition, students must seek special permission to repeat classes. If students receive a D or F in the course, the student can repeat the course only once rather than twice. The Repeat Rule 2 page might look as follows:



Example repeat rule (1 of 7)

- The Total Attempts Allowed field is set to *3.*

  Undergraduate students can repeat courses twice only (first attempt plus 2 repeats equals 3 total attempts).

- Undergraduate students can repeat courses for a total of 12 units, as specified in the Total Units Allowed field.
- We select *ILGL* (illegal repeat) in the Repeat Code Violated field.

  If the process finds a student in violation of the total attempts allowed or total units allowed, the process assigns the *ILGL* repeat code to the student's enrollment record for the repeated course.

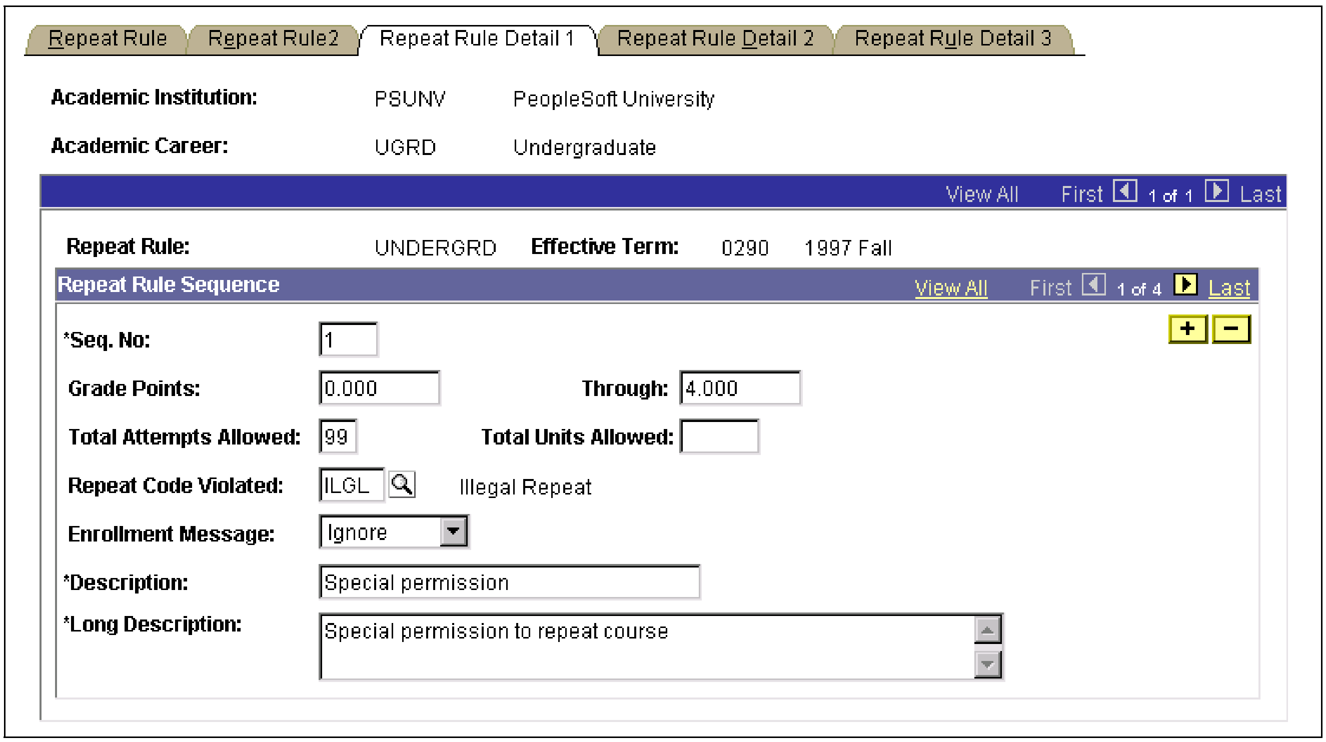
- The Enrollment Message field is set to *Error.*

If the Repeat Rule Checking process identifies the repeat on enrollment as exceeding the total attempts allowed or total units allowed, it issues an error message and the student is denied enrollment into the course.

- We select a repeat code exemption.

  If a student's enrollment contains the *PETM* (repeat allowed via petition) repeat code, the repeat rule does not prevent the enrollment—this exemption would also override the total attempts allowed or total units allowed maximums on the Repeat Rule 2 page during back-end processing. In order for the student's enrollment to contain this repeat code, manually assign it to the enrollment record on the Student Enrollment 1 page, the Quick Enrollment page, or the Enrollment Request page. In addition, it is assumed that the exemption codes are included in special permission rules where these codes are established as Must Equal conditions on the Repeat Rule Detail 2 page, though this is not required.

To require that students seek special permission to repeat classes, the Rule Detail 1 page might look as follows:



Example repeat rule (2 of 7)

- The sequence number is 1.

  The Repeat Rule Checking process considers this detail line first.

- The process includes any repeated courses that have a grade points per unit range from 0.000 through 4.000.

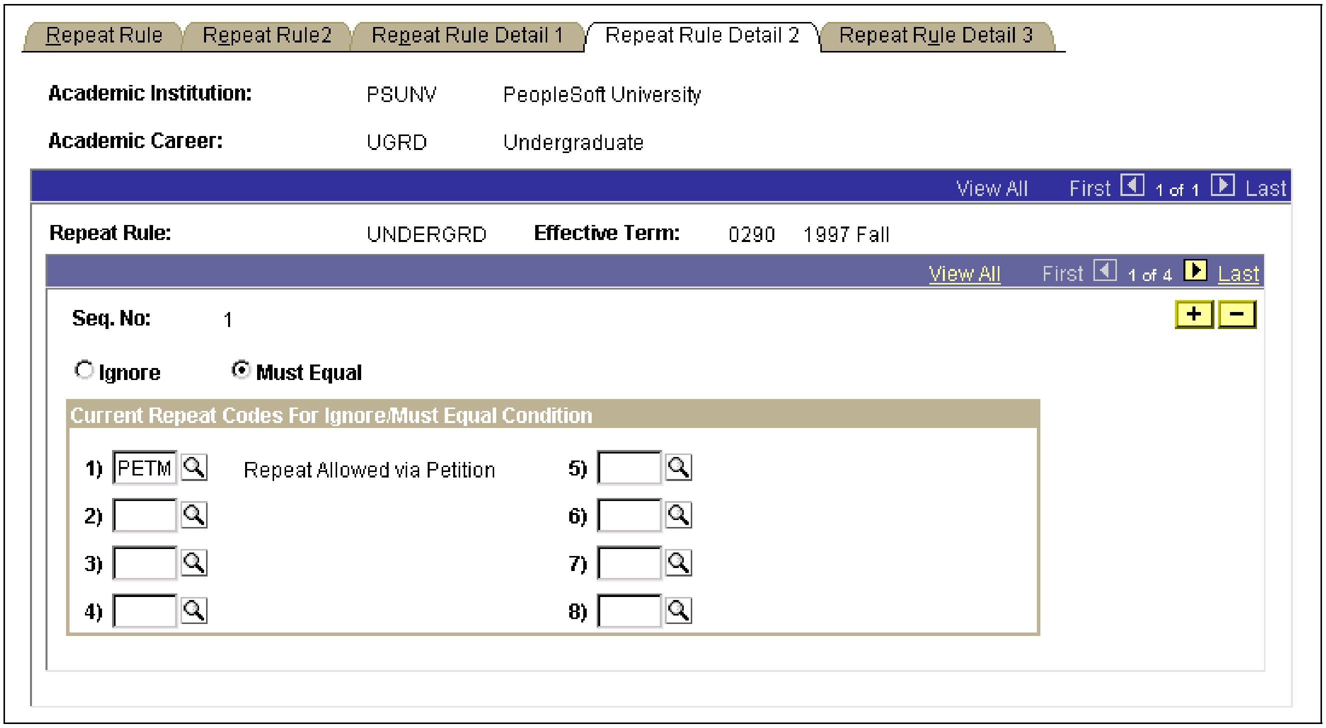
  This is so that the Repeat Rule Checking process evaluates every attempt, regardless of the student's grade. Since this is our most restrictive rule, we want the Repeat Rule Checking process to consider this rule first.

- Because the student must have special permission to repeat a course, we enter the value of *99* in the Total Attempts Allowed field.

  A student can repeat a class as many times as special permission is given.

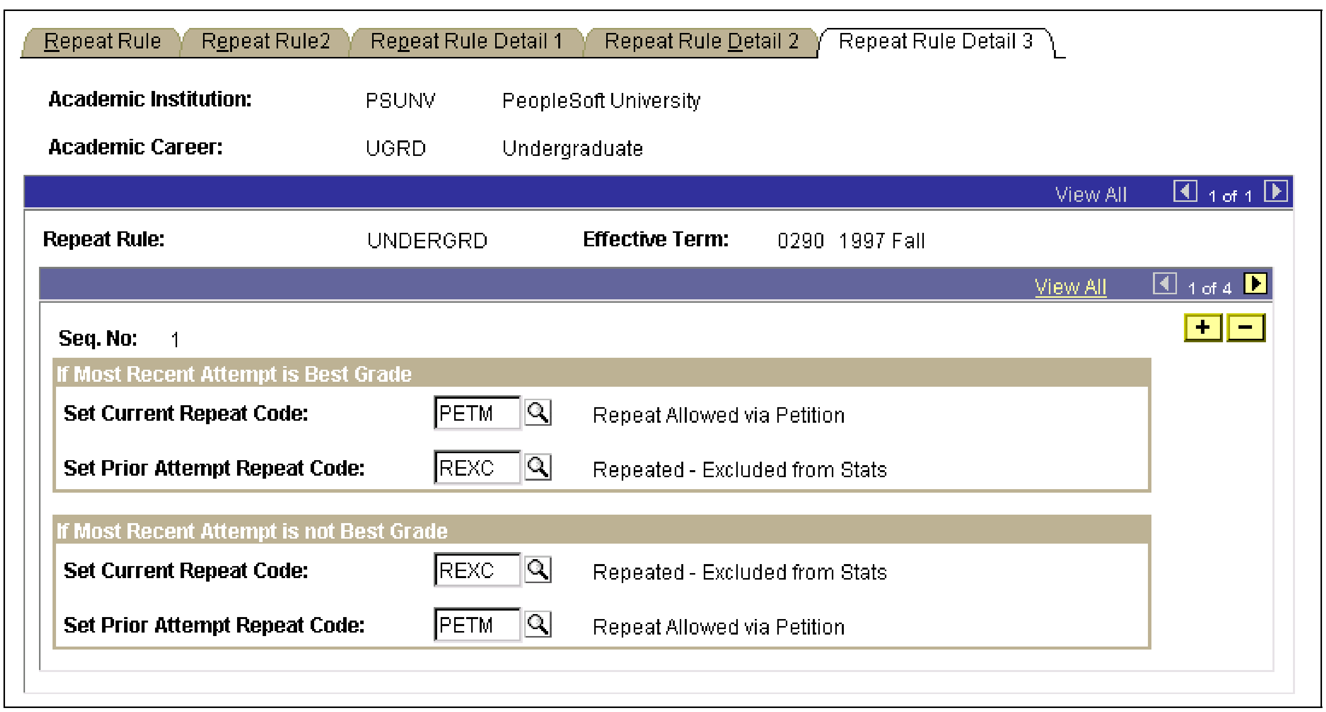
- There is no total units allowed restriction for this detail line of the repeat rule.

The Repeat Rule Detail 2 page might look as follows for the special permission detail line:



Example repeat rule (3 of 7)

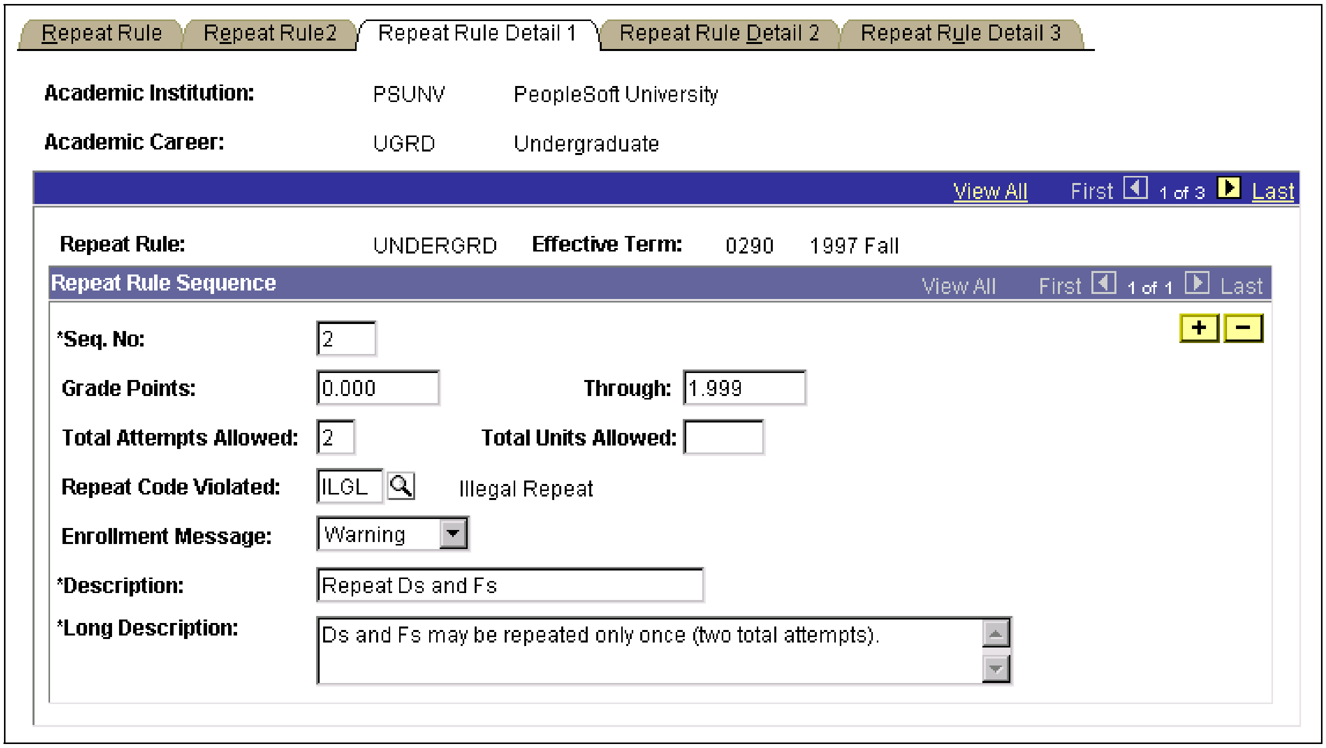
The Repeat Rule Checking process applies the codes on the Repeat Rule Detail 3 page if the current course attempt has been coded with *PETM*. If the current course attempt does not match the criteria, the system moves on to the next rule sequence detail line. The Rule Detail 3 page might look as follows for the special permission detail line:



Example repeat rule (4 of 7)

- If the current attempt of the class has the best grade, the system codes that class with *PETM,* and sets the prior attempt to *REXC* (repeated—excluded from statistics).
- If the current attempt of the class does not have the best grade, the system codes that class with *REXC,* and sets the prior attempt to *PETM.*

For the next detail line of the repeat rule, we want to specify that students can repeat D and F grades only once. The Repeat Rule Detail 1 page looks as follows:



Example repeat rule (5 of 7)

- The sequence number is 2.

  The system considers this detail line of the repeat rule second in the Repeat Rule Checking process.

- Repeated courses that have a grade points per unit range from 0.000 through 1.999 are included.

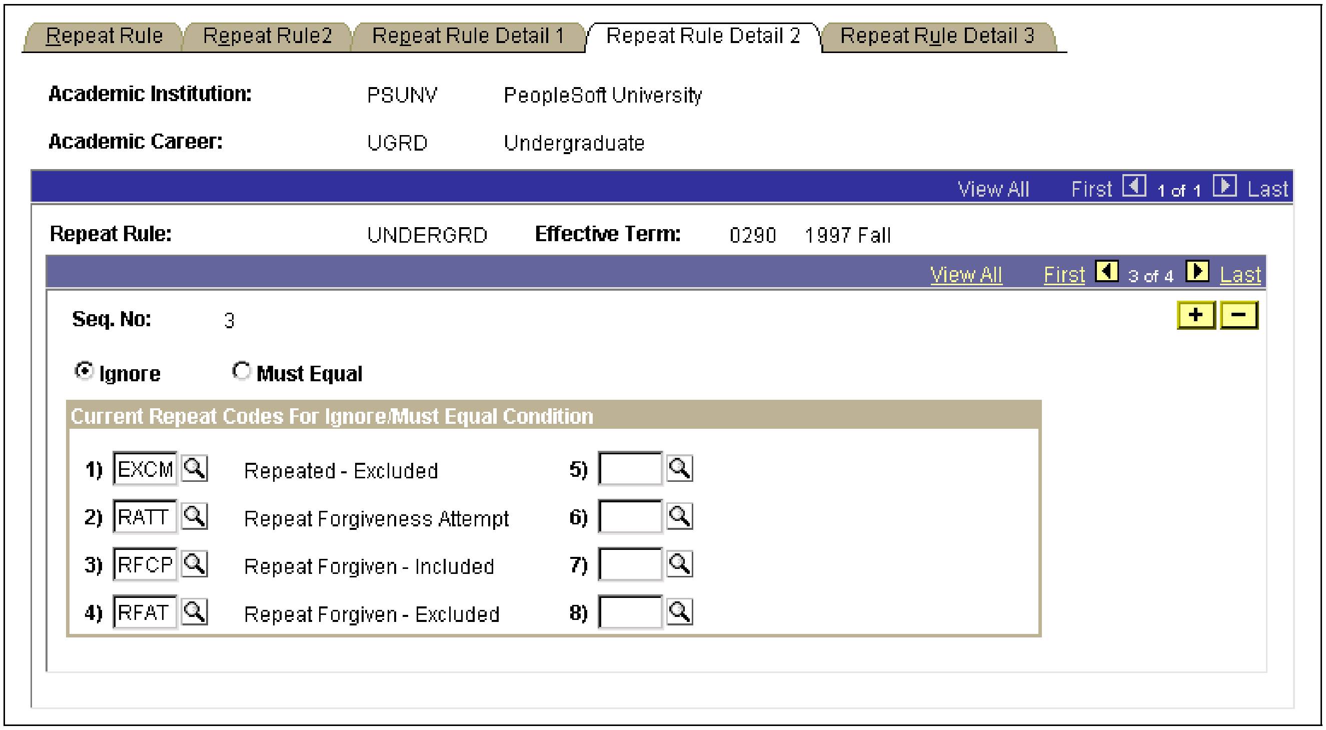
  Note that the grade range is concerned with only the grade of the *prior* course in the matched pair.

- A student is permitted to repeat a D or F grade once, and this is reflected in our Total Attempts Allowed field value of *2.*

  Course attempts include all attempts of the course, not just the repeats. In addition, the allowable course catalog repeats constitute the first attempt in this total attempts allowed. Therefore, if the catalog allows four attempts, all four of those attempts would constitute the first attempt in this number.

- There is no total units allowed restriction for this rule.
- If students violate the number of attempts, the Repeat Rule Checking process assigns the repeat code *ILGL* to the student's enrollment record for the current attempt, as defined in the Repeat Code Violated field.

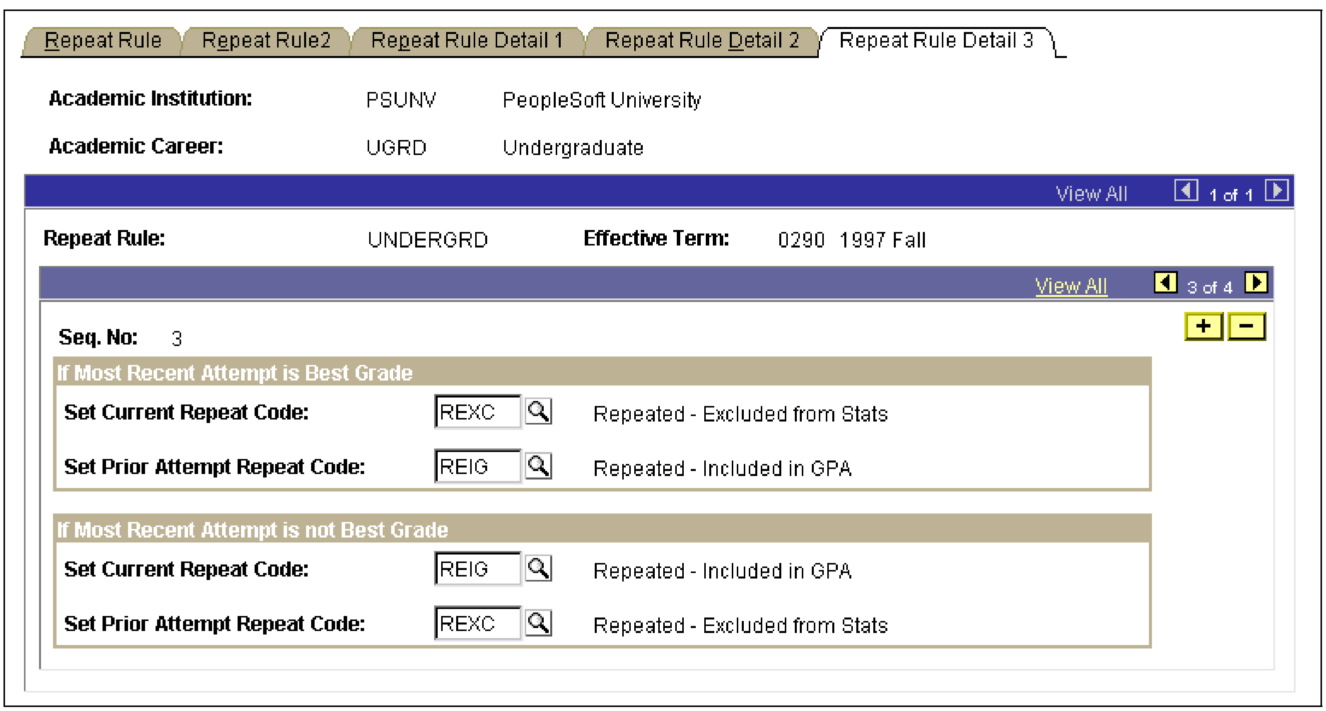
The Repeat Rule Detail 2 page might look as follows for this detail line of the repeat rule:



Example repeat rule (6 of 7)

On this page, the system does not apply this rule detail sequence if the current attempt has any one of the selected repeat codes attached to it.

The Repeat Rule Detail 3 page might look as follows for this detail line of the repeat rule:



Example repeat rule (7 of 7)

- If the current attempt of the class has the best grade, the system codes it with *REXC,* and code the prior attempt with *REIG* (repeated—included in grade point average).

- If the current attempt of the class does not have the best grade, the system codes it with *REIG,* and code the prior attempt with *REXC.*

Note. Once the Repeat Rule Checking process finds a matched pair of courses that violates a detail line of the repeat rule, it moves onto the next pair of matching courses.

Setting Up Repeat Checking for Academic Institutions

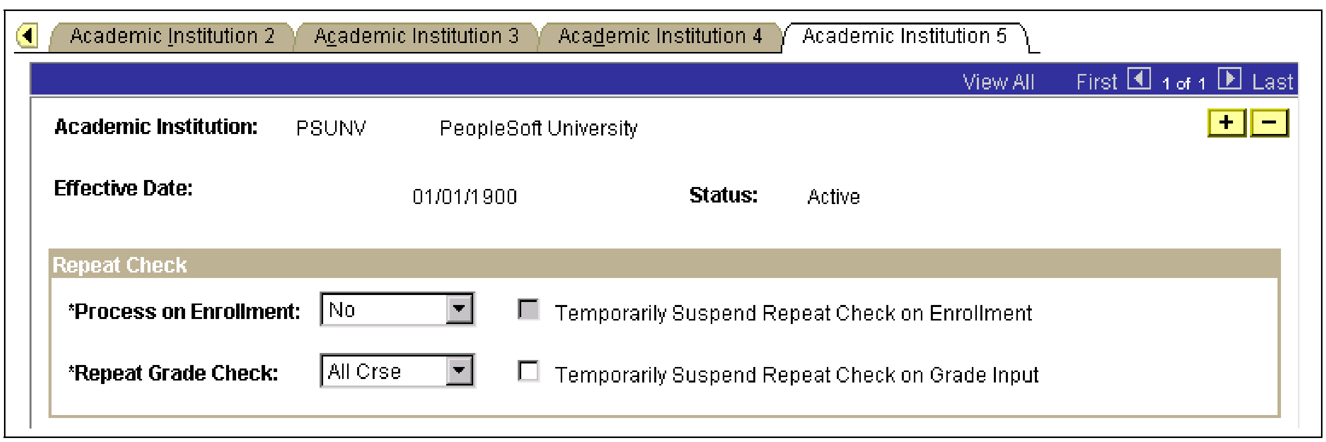
This section discusses how to set up repeat checking for academic institutions.

Page Used to Set Up Repeat Checking for Academic Institutions

Page Name	Object Name	Navigation	Usage
Academic Institution 5	INSTITUTION_TABLE5	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 5	Set repeat checking controls for academic institutions. Academic institution level is the highest level of control for the automatic Repeat Rule Checking process.

Setting Repeat Checking Controls for Academic Institutions

Access the Academic Institution 5 page.



Academic Institution 5 page

Process on Enrollment

Use this field to activate or deactivate the automatic Repeat Rule Checking process at enrollment time (front-end processing) for this entire academic institution. Select from the following choices.

Yes: Select if you want the Repeat Rule Checking process to automatically run during enrollment for this academic institution. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is front-end because it checks for repeats at enrollment, rather than when you post grades. You can run the Repeat Rule Checking process for this entire academic institution, for students in specific academic careers within the academic institution, or for students in specific academic programs within the academic careers. When you select *Yes* at the academic institution level, this value cascades down to the academic career and academic program levels. Thus, when you select *Yes* for an academic institution, every academic career and academic program within that institution is also set to *Yes.* However, you can still manually select *No* at the academic career and academic program levels.

No: Select if you *do not* want the Repeat Rule Checking process to run for this entire academic institution during enrollment. If you select *No* here, the system sets the Process on Enrollment field at the academic career and academic program levels to *No,* and renders them unavailable.

Warning! Once you select *Yes* at the academic institution level, every academic career and program within this institution is set to *Yes*. The same is true if you select *No.* If you change the setting from *Yes* to *No,* you also change the settings for every academic career and program within this institution. To reset the fields, you must go into each academic career and academic program and change them manually.

Repeat Grade Check

Use this field to activate or deactivate repeat checking on grade input for this entire academic institution. Select from the following choices.

All Crse (all courses): Select if you want the Repeat Rule Checking process to run during grade input (on the Enrollment Request page) for every course in this academic institution. This is a back-end process that checks for repeats based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades, after the student has already completed the class, rather than at enrollment. You can run the Repeat Rule Checking process for this entire academic institution, for specific academic careers within the academic institution, or for specific academic programs within academic careers. When you select *All Crse* at the academic institution level, the system runs the Repeat Rule Checking process for every academic career within this academic institution that has a value of *All Crse* in the Repeat Grade Check field in the Academic Career Table component. Likewise, if you check *All Crse* at the academic career level, the system looks at the repeat grade check setting at the academic program level to determine whether to run the Repeat Rule Checking process for each academic program within the academic career.

Never: Select if you do not want the Repeat Rule Checking process to run during grade input on the Enrollment Request page. If you select *Never* here, the system sets the Repeat Grade Check field at the academic career and academic program levels to *Never,* and renders the field unavailable.

Only Rep (only repeats): Select if you want to run the process against all class enrollments on a student's enrollment record (STDNT_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes where the course is defined as an allowable repeat through the Course Catalog component.

Warning! Once you select *All Crse* at the academic institution level, every academic career and academic program within this academic institution is also set to *All Crse.* The same is true if you select *Never.* If you change the setting from *All Crse* to *Never,* you also change the settings for every academic career and program within this academic institution. To reset the fields, you must go into each academic career and program and change them manually.

Note. The automatic Repeat Rule Checking process runs only when you post grades using the Enrollment Request page. The process *does not* run when you post grades using the grade roster, Quick Enrollment page, or Student Enrollment 1 page.

Temporarily Suspend Repeat Check on Enrollment

Select to temporarily suspend the Repeat Rule Checking process at enrollment for this academic institution. This check box enables you to temporarily suspend repeat rule checking during peak enrollment periods, when the Repeat Rule Checking process would seriously impair performance. After the peak period has passed, return to this page and clear this check box to reenable the Repeat Rule Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat. Selecting this check box renders the Process on Enrollment and Temporarily Suspend Repeat Check on Enrollment fields at the academic career and program levels unavailable. However, selecting this check box does not change the settings in the Process on Enrollment fields at the academic career or program levels. Note that this is the main difference between the cascading functionality through the Process on Enrollment and Repeat Grade Check fields and the suspension functionality—suspension does not alter the previous settings of lower levels.

Temporarily Suspend Repeat Check on Grade Input

Select to temporarily suspend the Repeat Rule Checking process during grade input for this academic institution. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Rule Checking process would seriously impair performance. After the peak period has past, come back to this page and clear this check box to reenable the Repeat Rule Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats, so you will not know if any repeat rules apply to students until you run the Repeat Rule Checking process manually. Selecting this check box renders the Repeat Grade Check and Temporarily Suspend Repeat Check on Grade Input fields at the academic career and program levels unavailable. However, selecting this check box does not change the settings in the Repeat Grade Check fields at the academic career or program levels. Note that this is the main difference between the cascading functionality through the Process on Enrollment and Repeat Grade Check fields and the suspension functionality—suspension does not alter the previous settings of lower levels.

Setting Up Repeat Checking for Academic Careers

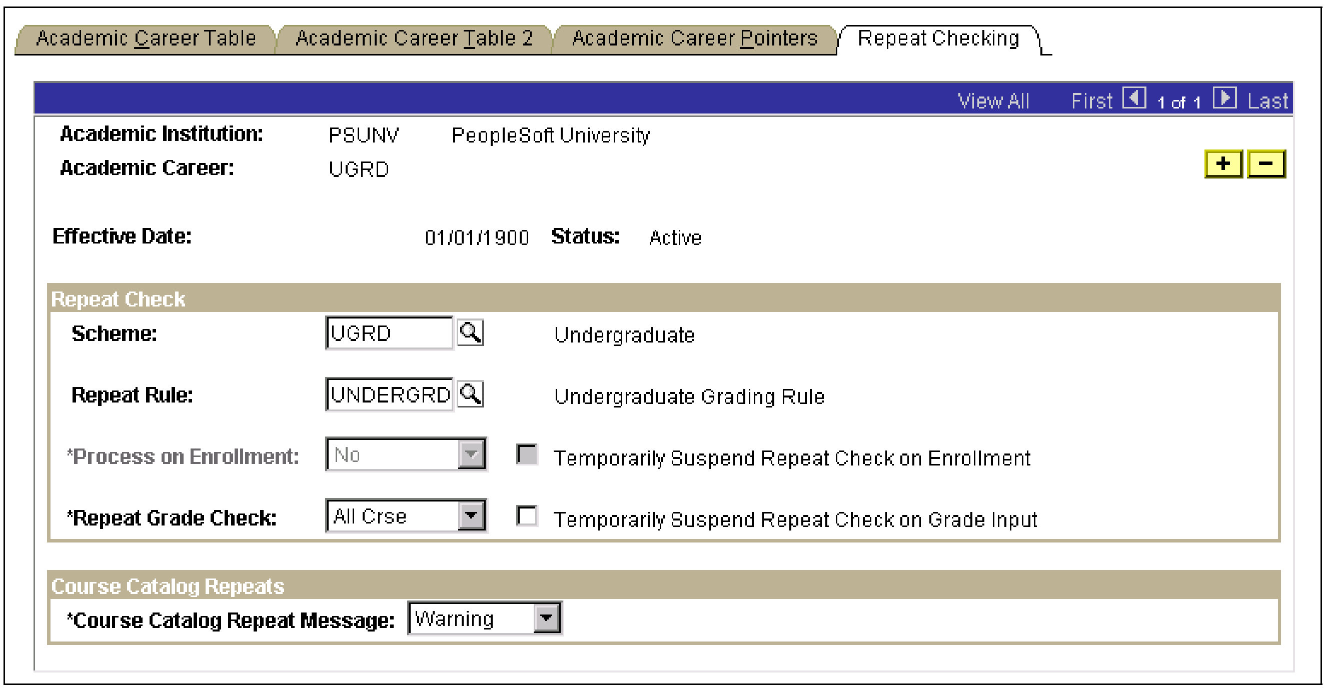
This section discusses how to set up repeat checking for academic careers.

Page Used to Set Up Repeat Checking for Academic Careers

Page Name	Object Name	Navigation	Usage
Repeat Checking	ACAD_CAR_RPT_CHK	Design Student Administration, Design Academic Structure, Setup, Academic Career Table, Repeat Checking	Set repeat checking controls at the academic career level. Also link a repeat rule to an academic career.

Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page.



Repeat Checking page

Scheme

Select a repeat scheme for this academic career. Repeat schemes contain the set of all valid repeat codes for this academic career.

Repeat Rule

Select a repeat rule to assign a rule to this academic career. Repeat rules contain the conditions that define your repeat checking policies. For example, the repeat rule can specify how many times a student can take courses given certain conditions, such as the grades earned. Settings at the academic career level serve as defaults for all of the academic programs within this academic career wherein a repeat rule is not attached to the academic program. Repeat rules must be assigned to an academic career for the Repeat Rule Checking process to function at enrollment or grade input. Define repeat rules on the Repeat Rule page.

Process on Enrollment

Use this field to activate the Repeat Rule Checking process for the academic career at enrollment. Your choices are *Yes* and *No.*

Select *Yes* if you want the Repeat Rule Checking process to run during enrollment for this academic career. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is front-end because it checks for repeats at enrollment, rather than when you post grades. You can run the Repeat Rule Checking process for the entire academic institution, for students in particular academic careers within the academic institution, and for students in primary academic programs within academic careers. When you select *Yes* at the academic career level, the system runs the Repeat Rule Checking process for all students in every primary academic program within this academic career that has a value of *Yes* in the Process on Enrollment field in the Academic Program Table component. This field is unavailable if *No* is selected at the academic institution level.

Warning! Once you select *Yes* at the academic career level, every academic program within this academic career is also set to *Yes.* The same is true if you select *No*. If you change the setting from *Yes* to *No,* you also change the settings for every academic program within this academic career. To reset the fields, you must go into each academic program and change them back manually.

Repeat Grade Check

Use this field to activate the Repeat Rule Checking process on grade input for this academic career.

All Crse (all courses): Select if you want the Repeat Rule Checking process to run during grade input for this academic career. This is a back-end process that checks repeats based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades on the Enrollment Request page, after the student has completed the class, rather than at enrollment time. You can run the Repeat Rule Checking process for the entire academic institution, for academic careers within the academic institution, and for academic programs within academic careers. When you select *All Crse* at the academic career level, the system runs the Repeat Rule Checking process for every academic program within this academic career that has a value of *All Crse* in the repeat grade check field in the Academic Program Table component. This field is unavailable if *Never* is selected at the academic institution level.

Never: Select if you do not want the Repeat Rule Checking process to run during grade input on the Enrollment Request page. If you select *Never* here, the system sets the Repeat Grade Check field at the academic program level to *Never,* and renders the field unavailable. Likewise, the Repeat Grade Check field on this page is unavailable when you select *Never* at the academic institution level.

Only Rep (only repeats): Select if you want to run the process against all class enrollments on a student's enrollment record (STDNT_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes where the course is defined as an allowable repeat through the Course Catalog component.

Warning! When you select *Never,* the system changes the setting in the Repeat Grade Check field for every academic program to *Never.* To reset the fields, you must go into each academic program and change them back manually.

Note. The automatic Repeat Rule Checking process runs only when you post grades using the Enrollment Request page. The process *does not* run when you post grades using the grade roster, Quick Enrollment page, or Student Enrollment 1 page.

Temporarily Suspend Repeat Check on Enrollment

Select to temporarily suspend the Repeat Rule Checking process during enrollment for this academic career. This option temporarily suspends repeat checking during peak enrollment periods, when the Repeat Rule Checking process would seriously impair performance. After the peak period, return to this page and clear this check box to reenable the Repeat Rule Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat. Selecting this check box renders the Process on Enrollment and Temporarily Suspend Repeat Check on Enrollment fields at the academic program level unavailable. However, selecting this check box does not change the settings in the Process on Enrollment fields at the academic program level.

Temporarily Suspend Repeat Check on Grade Input

Select to temporarily suspend the Repeat Rule Checking process during grade input for this academic career. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Rule Checking process would seriously impair performance. After the peak period has passed, return to this page and clear this check box to reenable the Repeat Rule Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats while grading through the Enrollment Request page, so you will not know if any repeat rules apply to students until you run the Repeat Rule Checking process in batch. Selecting this check box renders the Repeat Grade Check and Temporarily Suspend Repeat Check on Grade Input fields at the academic program level unavailable. However, selecting this check box does not change the settings in the Repeat Grade Check fields at the academic program level.

Course Catalog Repeat Message

Select from the following choices the message type that the system displays during enrollment when the course catalog Allowable Repeats process detects that the student has previously taken the course.

Error: Issues an error and prevents the student from enrolling in the repeated class.

Warning: Issues a warning that the repeatable limit, as established on the course catalog, has been exceeded. The system allows the student to enroll in the class.

None: Issues no warning or error and the system allows the student to enroll in the class.

The course catalog Allowable Repeats process runs at class enrollment and looks at settings at the course catalog level to see whether a course can be repeated. This process does not affect student statistics, it is used to determine whether a student can repeat a course. Once the completions maximum or units maximum is exceeded, the system issues enrollment messages, depending on the message type selected. This assumes that the course catalog repeats functionality is in effect.

The system renders the Course Catalog Repeat Message field unavailable when you select *Yes* in the Process on Enrollment field. The system renders the field unavailable because when you run the Repeat Rule Checking process on enrollment, the course catalog Allowable Repeats process does not issue a message when a repeated course is in violation of the course catalog repeat maximums. The Repeat Rule Checking process analyzes the student's enrollment records for repeated courses and issues warnings only after the course catalog Allowable Repeats process identifies an enrollment that exceeds the completions maximum or units maximum set on the Catalog Data page of the Course Catalog component.

Setting Up Repeat Checking for Academic Programs

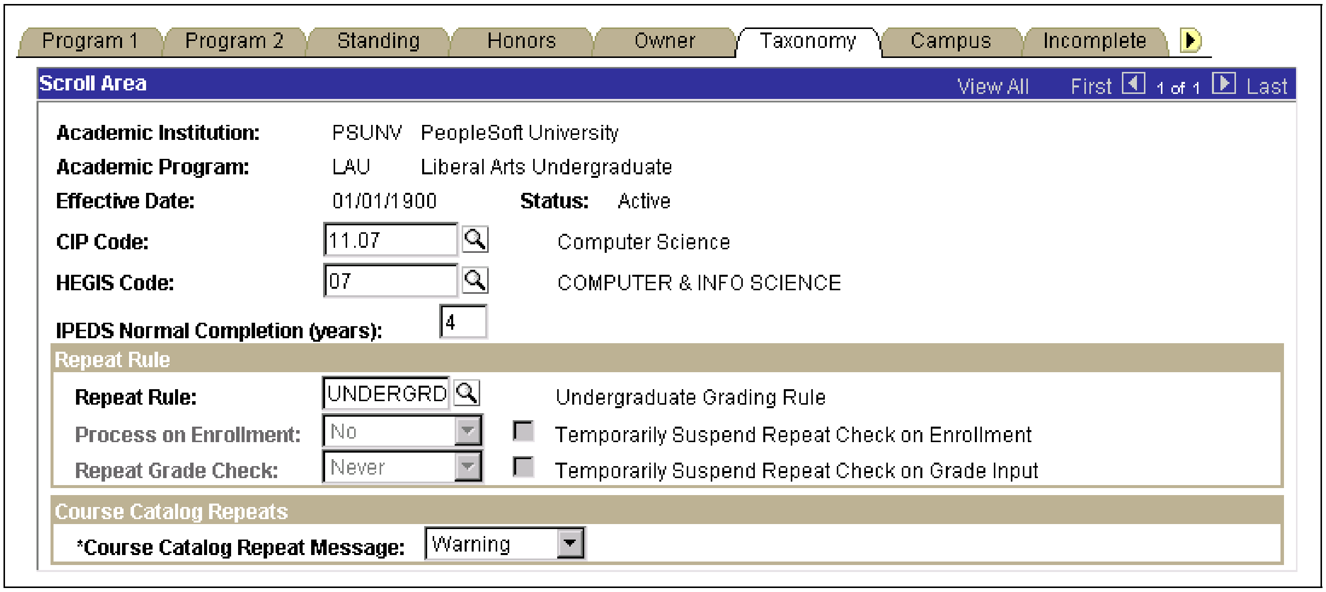
This section discusses how to set up repeat checking for academic programs.

Page Used to Set Up Repeat Checking for Academic Programs

Page Name	Object Name	Navigation	Usage
Taxonomy	ACAD_PROG_TAXONOMY	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Taxonomy	Set repeat checking controls at the academic program level and link repeat rules to academic programs. Also link academic programs to CIP codes and HEGIS codes.

Setting Repeat Checking Controls for Academic Programs

Access the Taxonomy page.



Taxonomy page

Linking a repeat rule to an academic program is the last step in setting up repeat checking. However, this is not a required step. If you *do not* attach a repeat rule at the academic program level, the Repeat Checking process uses the repeat rule set for the academic career to which the academic program belongs. Thus, link a repeat rule to an academic program *only if* you *do not* want the Repeat Checking process to use the repeat rule specified for the academic career.

CIP Code (Classification of Instructional Programs code)
Select the CIP code for this academic program.

HEGIS Code (Higher Education General Information Survey code)
Select the HEGIS code for this academic program.

IPEDS Normal Completion (years) (Integrated Postsecondary Education Data System normal completion years)
Enter the number of years it normally takes a student to complete this academic program. The Completions report for IPEDS uses this information. The Completions report is one of the OLAP cubes delivered with PeopleSoft Student Records.

Repeat Rule
Select a repeat rule for this academic program. The system prompts you with valid choices according to the academic career to which this academic program belongs. Repeat rules contain the conditions that define your repeat checking policies. For example, the repeat rule can specify how many times a student can take courses given certain conditions, such as the grades that the student earns. Settings at the academic career level are defaults for all of the academic programs within this academic career wherein a repeat rule is not attached to the academic program. Repeat rules must be assigned to an academic career for the Repeat Checking process to function at grade input.

Process on Enrollment
Use this field to activate the Repeat Checking process at enrollment time for this academic program. Your choices are *Yes* and *No*.

Select *Yes* if you want the Repeat Checking process to run during enrollment for this academic program. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is front-end because it checks for repeats at enrollment time, rather than when you post grades. You can run the Repeat Checking process for the entire academic institution, for students in particular academic careers within the academic institution, and for students in primary academic programs within academic careers. This field is unavailable if *No* is selected at the academic career or academic institution levels.

Select *No* if you do not want the Repeat Checking process to run during enrollment processing for students in this academic program. This field is unavailable when you select *No* at the academic career or academic institution level.

Repeat Grade Check

Use this field to activate or deactivate the Repeat Checking process upon grade submission on the Enrollment Request page or the Quick Enrollment page for this academic program. Select from the following choices.

All Crse: Select this option if you want the Repeat Checking process to run upon grade submission on the Enrollment Request page for this academic program. This is a back-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades, after the student has already completed the class, rather than at enrollment time. You can run the Repeat Checking process for the entire academic institution, for academic careers within the academic institution, and for academic programs within academic careers. This field is unavailable if *Never* is selected at the academic career or academic institution levels.

Never: Select this option if you do not want the Repeat Checking process to run upon grade submission on the Enrollment Request page. This field is unavailable when you select *Never* at the academic career or academic institution level.

Only Rep (only repeats): Select if you want to run the process against all class enrollments on a student's enrollment record (STDNT_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes where the course is defined as an allowable repeat through the Course Catalog component.

Temporarily Suspend Repeat Ck on Enrollment (temporarily suspend repeat checking on enrollment)

Select to temporarily suspend the Repeat Checking process at enrollment time for students in this academic program. This check box enables you to temporarily suspend repeat checking during peak enrollment periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to reenable the Repeat Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat.

Temporarily Suspend Repeat Ck on Grade Input (temporarily suspend repeat checking on grade input)

Select to temporarily suspend the Repeat Checking process during grade input for this academic program. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to reenable the Repeat Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats, so you will not know if any repeat rules apply to students until you run the Repeat Checking process in batch.

Course Catalog Repeat Message

Select from the following choices the message type the system displays during enrollment when the Allowable Repeats process detects that the student has previously taken the course.

Error: Issues an error and prevents the student from enrolling in the repeated class.

Warning: Issues a warning that the repeatable limit as established on the course catalog has been exceeded. The student is still able to enroll in the class.

None: Issues no warning or error and the student is still able to enroll in the class.

The Allowable Repeats process runs at class enrollment time and looks at settings at the course catalog level to see whether a course can be repeated. This process does not affect student statistics; it is used only to determine whether a student can repeat a course. Once the completions maximum or units maximum has been exceeded, the system issues enrollment messages, depending on the message type selected and assuming that the Course Catalog Repeats functionality is in effect.

The system renders the Course Catalog Repeat Message field unavailable when you select *Yes* in the Process on Enrollment field. The system renders the field unavailable because when you run the Repeat Checking on Enrollment process, the Allowable Repeats process does not issue a message when a repeated course is in violation of the course catalog repeat maximums. The Repeat Checking process analyzes the student's enrollment records for repeated courses and issues warnings only after the Allowable Repeats process identifies an enrollment that exceeds the completions maximum or units maximum set on the Catalog Data page of the Course Catalog component.

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," Running the Build Student Records Cube Process, page 859

CHAPTER 4

Setting Up the Course Catalog

This chapter gives an overview of the course catalog and explains how to:

- Create course offerings.
- (Optional) Create course equivalency groups.
- (Optional) Print the course catalog report.
- (Optional) Search for courses.

See Also

Chapter 5, "Setting Up Enrollment Requisites," page 99

Understanding the Course Catalog

When you first set up your Course Catalog, make sure to do some preliminary work to research how your institution structures course pre-requisites and co-requisites, and how new requisites are created and approved. Our course requisite design lets you structure requirements that can be shared among many courses. Requirements can encompass prerequisite courses, GPA and unit requirements, and course lists, among other factors. To minimize duplicate data entry of requisite requirements, map these out carefully. It is also important to note that the data you enter in the Course Catalog defaults to the Schedule of Classes. This is a key feature of the Course Catalog, saving you data entry time when it comes to scheduling classes. In addition, the catalog component uses effective dating, enabling you to track historical course changes, and to prepare for curriculum changes in the future.

Prerequisites

Before you can define courses in the course catalog, you must first set up the following for your institution:

- Institution codes
- Academic groups
- Subject area
- Campuses
- Academic organizations
- Academic careers

- (Optional) Room characteristics
- (Optional) Requirement designations
- (Optional) Course attributes

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Academic Institutions

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Academic Groups

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Subject Areas

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Setting Up Campuses

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Academic Organizations

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Academic Careers

Chapter 2, “Preparing for the Course Catalog and Schedule of Classes,” Defining Buildings, Rooms, and Classroom Facilities, page 13

Chapter 2, “Preparing for the Course Catalog and Schedule of Classes,” Creating Requirement Designations, page 22

Chapter 2, “Preparing for the Course Catalog and Schedule of Classes,” Setting Up Catalog and Schedule Options, page 9

Creating Course Offerings

The Course Catalog component contains several pages that enable you to enter everything for a course offering: the course title, units, workload hours, components, description, topics, requisites, and so on. We will review each of the pages in the order in which you would use them to set up a new course offering. In our design, a course offering includes all components of a course, such as lecture, laboratory, and discussion.

Here’s how to create a course:

1. Define the course title, description, units, grade bases, repeat rules, equivalent course groups, topics, and course attributes on the Catalog Data page.
2. Define the course offering number, catalog number, subject area, academic organization, CIP/HEGIS codes, and attach requirement designations on the Offerings page.
3. Determine course components, final exam and room characteristics on the Components page.
4. Map courses as course item types to specific General Ledger Accounts on the GL Interface page.

Prerequisites

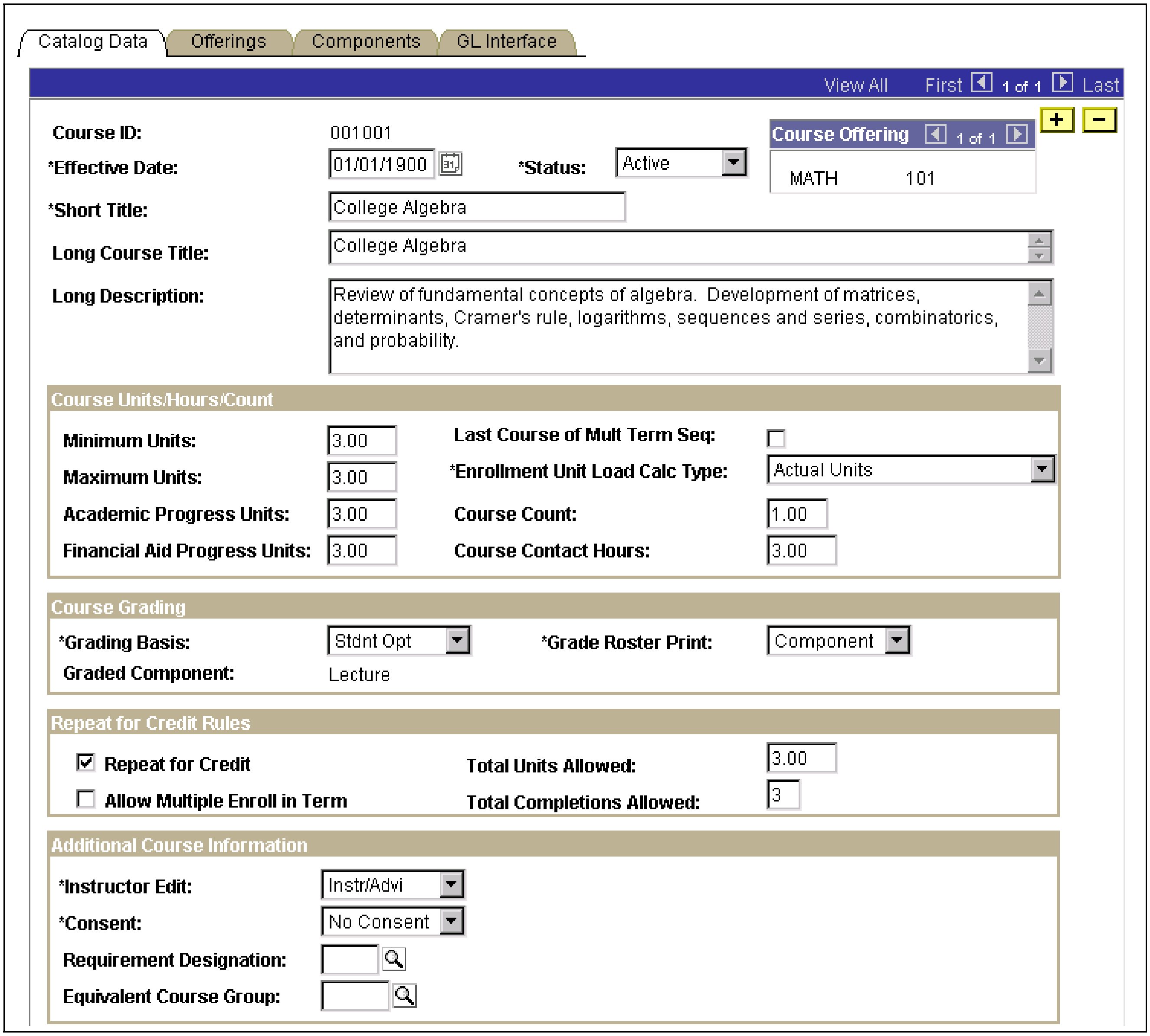
After you have set up your institution codes, academic groups, subject areas, campuses, academic organizations, and academic careers you can set up the basics of your course catalog. It is helpful if you have also set up room characteristics, requirement designations, enrollment requisites, and course attributes.

Pages Used to Create Course Offerings

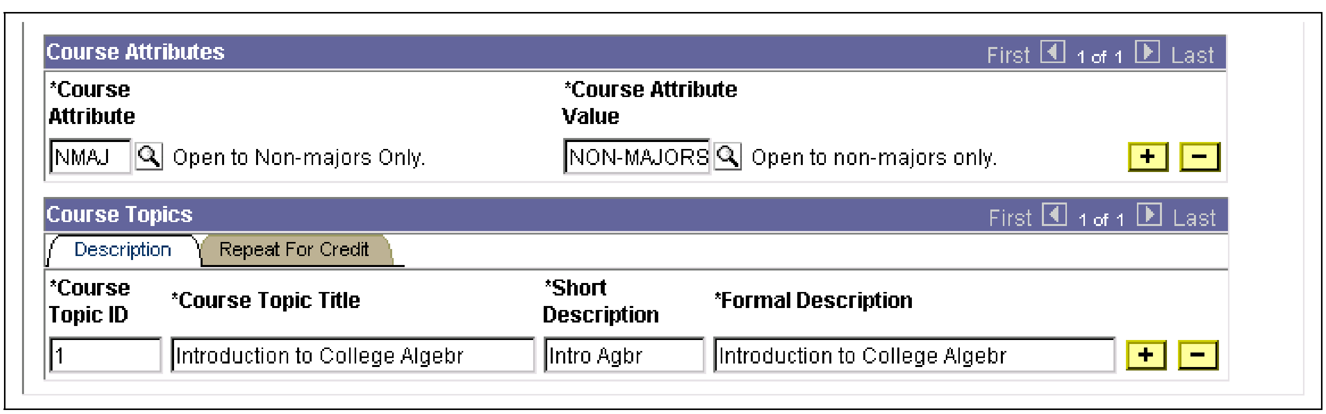
Page Name	Object Name	Navigation	Usage
Catalog Data	CRSE_CATALOG	Manage Student Records, Establish Courses, Use, Course Catalog, Catalog Data	Define course titles, course units, grade bases, topics, and repeat rules.
Offerings	CRSE_CATALOG_OFFER	Manage Student Records, Establish Courses, Use, Course Catalog, Offerings	Define course numbers, link academic organizations to course offerings, and so on.
Components	CRSE_CATALOG_CMPNT	Manage Student Records, Establish Courses, Use, Course Catalog, Components	Define components such as lecture, laboratory, and discussion as well as instructor workload hours, room characteristics, additional fees, and final exams.
GL Interface (general ledger interface)	CRSE_OFFER_GL	Manage Student Records, Establish Courses, Use, Course Catalog, GL Interface	Map course fees as item types to their proper general ledger accounts. The system generates charges to the student's account based on the course code you define on this page and offsets these charges based on the general ledger you define on this page. Your office needs to coordinate the information on this page with your controller's office.

Defining Course Catalog Data

Access the Catalog Data page.



Catalog Data page (1 of 2)



Catalog Data page (2 of 2)

The system generates a unique Course ID when you add a new course, as long as you don't enter a course ID yourself. We recommend that you let the system generate the course ID.

Effective Date Enter an effective date for this course. The effective date defines when the status you select is valid. Use a new effective date each time you make a change to a course offering. Insert new rows as needed, and modify the record. This way you can track historical course changes.

Status Select a status for this course. Select *Active* when the course is valid for your institution. You can keep all courses in the database for historical research purposes by setting to *Inactive* courses that you no longer offer.

Note. When you schedule a class for a term, the system prompts against the Catalog Data page using the start date of the term as the effective date to find the appropriate row in the catalog. Therefore, you do not need to create a new catalog entry for every term. Simply insert a new effective-dated row for your revisions.

Short Course Title and **Long Course Title** The short title appears on items such as transcripts, advisement reports, study lists, course catalog search, and the schedule of classes. The long course title appears on the course catalog report.

Long Description The long description can display in the course catalog report (if you specify).

Course Units/Hours/Count

There are four unit types that you attach to a course in the course catalog:

1. Minimum Units
2. Maximum Units
3. Academic Progress Units
4. Financial Aid Progress Units

These values default to the Schedule of Classes - Class Associations page, where you can override course unit values for a class. When a student enrolls in a class, corresponding fields on the Student Enrollment 1 page populate with the values on the Class Associations page. Once a student enrolls, the system uses each unit type to determine the student's academic and financial aid load, academic level, and grade point average. As a general rule, the minimum, maximum, academic progress and financial aid progress units are always the same. The exception is with multi-term courses, remedial courses, and variable unit courses.

Note. For courses where the minimum and maximum units are the same, the Minimum Units field populates the Units Taken field on the Student Enrollment 1 page, which the system uses to calculate GPA.

Minimum Units and **Maximum Units** Enter the minimum units and maximum units that the course is worth. The minimum and maximum units are the same, except for a variable unit class. For a variable unit class, the minimum and maximum units would constitute a range and the student or administrator would be able to choose from within that range how many units the class is worth. For example, the minimum units could be set at *2* and the maximum units could be set at *3*. After you schedule the class, you can enroll the student and enter the number of units the student chooses to take for the class in the Units Taken field on the Enrollment Request 1 page.

Academic Progress Units

The system uses academic progress units in conjunction with the billing factor to calculate billing units, in order to calculate per unit fees. The system also uses academic progress units to calculate academic load. Academic progress units are usually equal to the minimum/maximum units, except for a multi-term class. A multi-term class is when all credit for a sequence of classes (HIST 101a + 101b) is granted once a student completes the last course in the sequence. To prevent the student from earning units taken, which are used to calculate GPA, or units earned, which are used by the Academic Advisement application, you could enter *0* in the *Minimum Units* field and *Maximum Units* field. Then you could enter *3* (or some other unit value) in the *Academic Progress Units* field.

The system would calculate the billing units and academic load using *3* (or some other unit value) academic progress units, yet the student would earn no credit.

Financial Aid Progress Units

The number of units for the course that the system counts towards tracking a student's financial aid load for a term.

Note. When minimum units and maximum units are not equal, the Academic Progress Units field and the Financial Aid Progress Units field on the Catalog Data page become unavailable, and Progress Units and FA Progress Units on the Student Enrollment 1 page default from the student's Units Taken field value.

Last Course of Multi-Term Sequence

Select this check box so that academic progress units can be less than the minimum units for this course. The academic progress units for the last course in a multi-term course is less than the minimum units because the minimum units have been accumulating over the entire sequence, and they are only granted after the student completes the last course. The academic progress units, on the other hand, are still granted for each course in the sequence, so they are less than the minimum units at the end of the sequence. See the Example of Multi-Term Course in the following section.

Enrollment Unit Load Calc Type (enrollment unit load calculation type)

Determines how the Enrollment Engine calculates the student's academic load. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

Actual Units: The system populates the Enrollment Unit Load Calc Type field to *Actual Units* by default. Use this option for any course where you have identical values for the Minimum Units, Maximum Units, and Academic Progress Units fields. The exception to this rule is when you are creating a variable unit course. Even though your minimum and maximum units are different, use *Actual Units*. The enrollment engine calculates the number of units the student can take in the term by looking at the Units Taken field on the Enrollment Request 1 or Student Enrollment 1 page (please see Example of Variable Unit Course below). You can also use this option for a remedial course, or the like, if you do not want the course to count toward the student's academic load.

Academic Units: Select this option for any course where the Minimum Units, Maximum Units, and Academic Progress Units are not identical, such as remedial courses and multi-term sequence courses. Selecting this option requires the system to look at the academic progress units when it calculates academic load. For example, the minimum units and maximum units might be *0,* because you do not want academic level and GPA to be affected by this course. The academic progress units would be *3* so the course would still be used to calculate academic load and billing units (please see Example of Multi-Term Course below). Furthermore, you could use this option for a remedial course, or the like, if you wanted the course to be used in calculating load, but did not want it to be used in calculating GPA.

Course Count

If you count courses (in addition to units) toward academic advising requirements or limits, enter a course count value in this field. The system populates this field by default from the course catalog. The course count indicates the worth, or count, of the course towards an advising requirement. Some institutions count courses, as well as units, towards degree requirements.

Course Contact Hours

The system populates this field by default to the Schedule of Classes - Instructor Contact Hours page, where the value is used to calculate Total Contact Hours. Each component of the course can have different contact hours on the Components page.

Grading Basis

Select a grading basis for the course. Grading basis values are defined on the Grading Scheme Table page. You can override the grading basis for individual class offerings when you create the schedule of classes.

Graded Component

The system displays the graded component based upon the *Grade Roster Print* field value on this page and the Graded Component field value on the Components page.

Grade Roster Print

Select the type of grade roster that you want to print for this course offering (as processed through the Grade Roster Print page). Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices for grade roster print are:

By Student: Grade rosters print for each student. Each student has a distinct grade roster, separated by a page break.

Component: Grade rosters print for the graded component of the course. The graded component is specified on the Components page.

Instructor: Grade rosters print for the graded component of the course. The graded component is specified on the Components page. A copy of the grade roster prints for each instructor, primary or otherwise. The number of copies that print is equal to the number of instructors for the course (primary or otherwise).

None: No grade roster prints for the course.

Repeat for Credit

Select this check box to indicate that the class can be repeated for additional credit (as opposed to repeating for grade improvement only).

If you do not select the check box, the class is subject to repeat rules set up in the Repeat Rule Table component.

Allow Multiple Enroll in Term (allow multiple enrollments in term)
Select this check box to permit a student to enroll in this course multiple times within the same term, such as an independent study course.

Total Units Allowed
The system populates this field by default to the maximum units for the course (because by default, one full course completion is always permissible). However, if you have selected the Repeat for Credit check box, you may edit and increase this value. This value must be equal to or greater than the maximum units for the course. The system enforces the lower of the two limits that you define (units or completions).

Total Completions Allowed
The system populates this field by default to *1* (because by default, one full course completion is always allowed). However, if you have selected the Repeat for Credit check box, you may edit and increase this value. This value must be equal to or greater than *1*. The system enforces the lower of the two limits that you define (units or completions).

Instructor Edit
Select how you want the system to prompt for instructor ID's during class scheduling and enrollment. This option determines the prompt values for the instructor ID when your institution schedules classes. It also determines the availability of the Instructor ID field for independent study courses during enrollment, where the student has the option to select the instructor. The system populates the value for the Instructor Edit field by default to the Class Associations page, where you can override the value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

No Choice: If you select this option, the system makes the Instructor ID field on the Enrollment Request page unavailable and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Schedule of Classes - Meetings page: Assignment tab. Thus, the student has *no choice* of instructor.

Class Instructor Edit: If you select this option, the system makes active the Instructor ID field on the Enrollment Request page and prompts you with only the 'Primary Instructors' for the class, as defined on the Meetings page. Use this option for independent study courses or the like, for which the student can select one of several 'Primary' instructors.

Instructor/Advisor Edit: If you select this option, then for the Instructor ID field on the Meetings page the system prompts you with only the instructors available to teach this course, as defined on the Instructor/Advisor Table page. The system also makes the Instructor ID field on the Enrollment Request page unavailable for entry, and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Meetings page. Therefore, *do not* select the *Instructor/Advisor Edit* option for an Independent Study course where you want students who enroll in these courses to have their choice of instructor.

Note. To activate the instructor/advisor edit, specify to edit instructors against instructor/advisor for the academic organization to which this class belongs on the Academic Organization Table page.

Consent

Select the consent type for enrollment in the course. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

No Consent: No special consent is required for a student to enroll.

Instructor or *Departmental:* If you indicate that either *Instructor* or *Departmental* consent is required for enrollment, consent is granted either by setting an *Override Permission* option on the Enrollment Request page or by using class permission numbers.

Requirement Designation

Select a requirement designation for the course. A requirement designation can be extra work that has to be done for a course, such as Design Credit, or a requirement designation can specify a special variety of a course to use in a course list for the Academic Advisement application.

Requirement designation values are defined on the Requirement Designation Table page. Example requirement designation values are *Design Credit, Thesis Choice,* and so on.

Requirement designations feed into the Academic Advisement application.

Equivalent Course Group

You can select an equivalent course group for the course. Equivalent course groups are defined on the Course Equivalencies page. Here, you are adding the course to a group of equivalent courses for requisite checking and degree progress requirement purposes. If two courses have the same Equivalent Course Group number, then they are equivalent to each other and can fulfill the same requirement.

Course Attribute and **Course Attribute Value**

Select the general characteristics that describe the course offering in the Course Attribute and Course Attribute Value fields. Course attributes are defined on the Course Attribute Table page. Course attributes do not feed into the Academic Advisement application. They are primarily used for institutional research purposes, and to print repetitive text in the catalog and schedule of classes. Example course attribute and course attribute values are *Degree Seeking Only - Open to Students in Any Plan,* and *Fall - Offered in Fall Only.*

Description Tab

See the above exhibit for a view of this tab.

Use the Description tab to define course topics associated with a course. You attach topics to specific classes on the Schedule of Classes - Basic Data page.

Course Topic ID

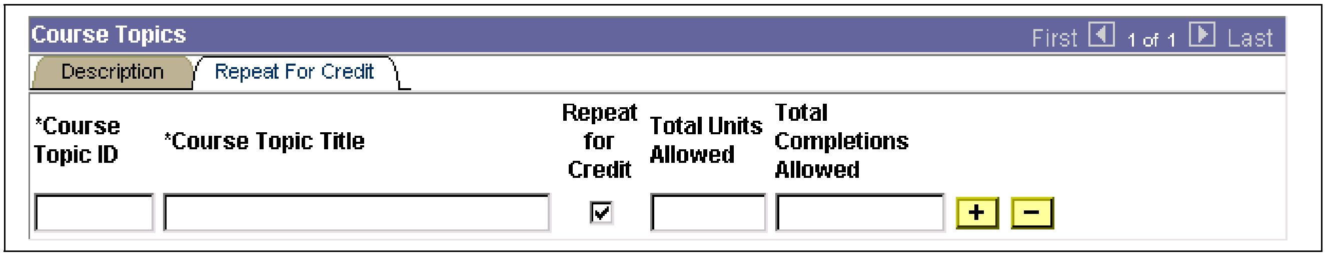
The system assigns a unique course topic ID number to identify the topic record. Insert rows to add topics.

Course Topic Title, Short Description, and **Formal Description**

Enter the course topic title, short description, and formal description.

Repeat For Credit Tab

Select the Repeat For Credit tab.



Course Catalog - Catalog Data page: Repeat For Credit tab

Repeat for Credit

Select to allow students to repeat the topic for credit. If you do not select this check box, additional enrollment in the same topic is subject to the repeat rules set up in the Repeat Rule Table component.

Total Units Allowed and **Total Completions Allowed**

If you select the *Repeat for Credit* check box, the *Total Units Allowed* and *Total Completions Allowed* fields become available for entry. Enter the maximum number of units and course completions allowed for credit within the topic. If you enter a value in both fields, the system enforces the lower of the two limits.

Example of Multi-Term Course

At PSUNV when a student takes History 101A for the fall term and History 101B for the spring term, the student's credit for both courses is contingent upon the successful completion of the entire course sequence. To define this multi-term course in the course catalog, we purposefully place the Minimum Units, Maximum Units, and Academic Progress Units out of synchronization so that the Enrollment Engine properly calculates the student's academic load and GPA. The Course Catalog might look similar to this:

Course	Term of Stdnt Enroll	Minimum Units	Maximum Units	Academic Progress Units	Last Course of Multi-Term Sequence	Enrollment Unit Load Calculation Type
History 101a	Fall 1999	0	0	3	No	Academic Units
History 101b	Spring 2000	6	6	3	Yes	Academic Units

Because the Minimum/Maximum Units are set to *0,* History 101a will not be calculated in the student's GPA or Academic Level (if academic level increments by units, that is). But when the student completes History 101b, he or she receives credit for both classes because the Minimum and Maximum Units are set to *6.* On the other hand, Academic Load and Billing Units will be counted for both classes because Academic Progress Units are set to *3,* and the Enrollment Unit Load Calculation Type is set to *Academic Units.*

Example of Variable Unit Course

At PSUNV, students can choose how many units they earn for ENGL 1a. They can choose within the range of *2* and *3* units. Because ENGL 1a is an elective course, they can choose to take it for only *2* units, in which case they are not required to complete a final project. Students who choose to complete the project earn *3* units. In this case, the Course Catalog might look similar to this:

Course	Minimum Units	Maximum Units	Academic Progress Units	Financial Aid Units	Enrollment Unit Load Type
ENGL 1a	2	3	Unavailable	Unavailable	Actual

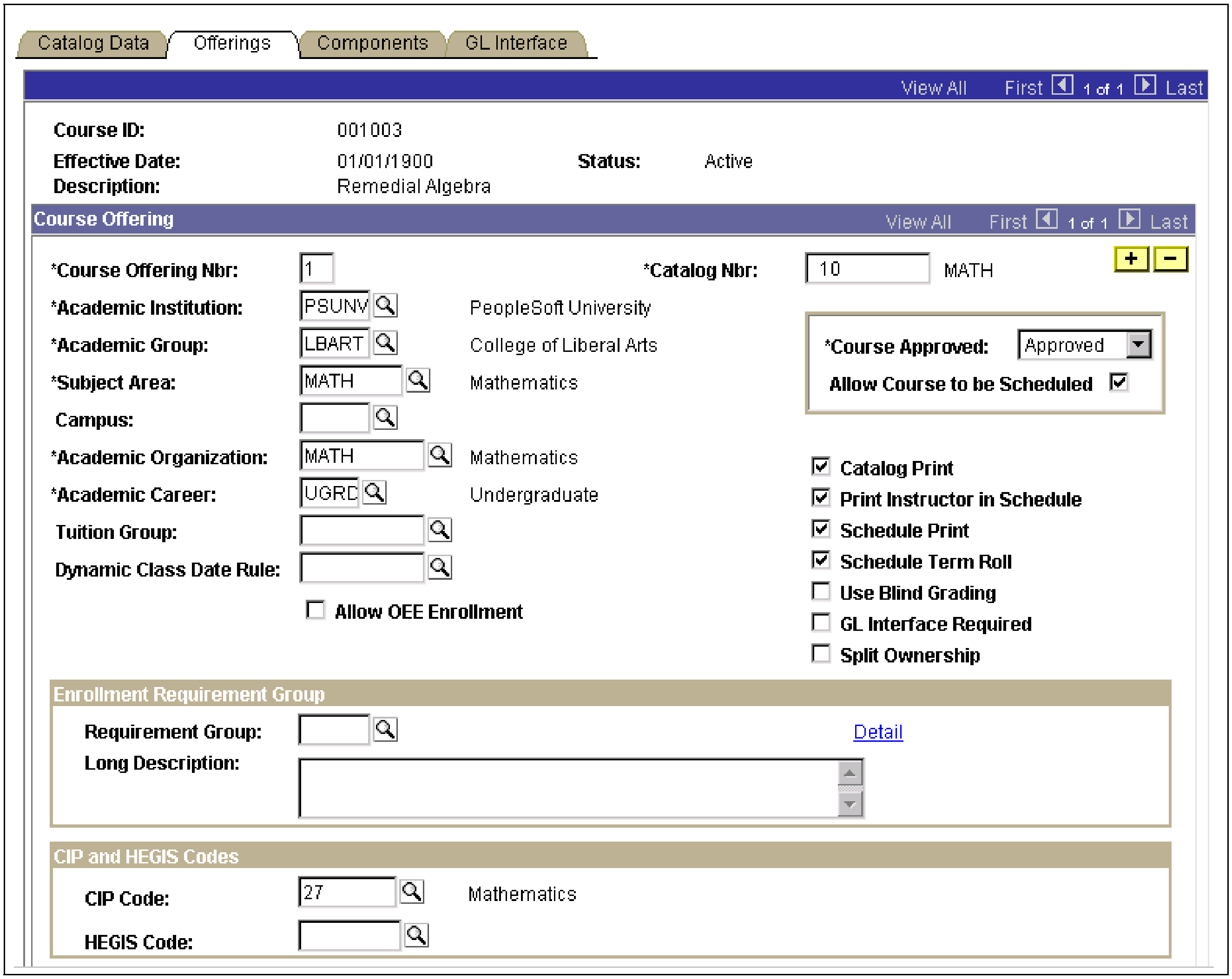
When students enroll in ENGL 1a they have to choose how many units to take. If they enroll online or through an Interactive Voice Response System, they can select the number of units they want to take when they add the class. If they enroll in person, the Registrar’s Office will most likely create an Enrollment Request. If the Minimum/Maximum Units fields on the Course Catalog Data page vary, the Units Taken field on the Enrollment Request page becomes available, and the Registrar’s Office can enter the number of units the student chooses to take. The possible enrollments would look like this:

Student	Units Taken	Units Earned	Academic Progress Units	Financial Aid Units	Billing Units
Student 1	2	2	2	2	2
Student 2	3	3	3	3	3

As you can see, the student chooses the number of units to take, and the system determines Units Earned, Academic Progress Units, and Financial Aid Units based on the units you enter in the Units Taken field when the student enrolls in the class.

Defining Course Offerings

Access the Offerings page.



Offerings page

Course Offering Number

The system generates the course offering number and uses it for sequencing. The system also uses the course offering number to distinguish cross-offered courses where the course ID is the same, as are the requisites, but the course itself is listed in different subject areas, academic groups, and so on.

Catalog Number

Within an academic group, catalog number ranges are linked to academic careers on the Academic Group Table page. Provided that you have already specified an academic group for this course offering, the system automatically displays the appropriate academic career when you enter a catalog number. This field is ten digits. The system reserves the four left digits exclusively for numeric characters, and the right six digits for both alpha and numeric characters. A field edit enforces this programming.

The system automatically reformats the catalog number you enter to fit the defined system format, as the following table illustrates:

Catalog Number	N	N	N	N	A/N	A/N	A/N	A/N	A/N	A/N
12			1	2						
120		1	2	0						
1A				1	A					
12B			1	2	B					
120AB		1	2	0	A	B				
B12					B	1	2			
AB1200					A	B	1	2	0	0
10001A	1	0	0	0	1	A				
1B12				1	B	1	2			

N = numeric character

A/N = alpha or numeric character

Academic Institution The system displays the academic institution by default. Multiple institutions can offer the same course by way of multiple course offerings.

Academic Group Select the academic group to which this course offering belongs. You can define global notes by academic group, which can appear on the Schedule of Classes report. In addition, academic group controls the valid meeting pattern values and their corresponding normal class duration values. Academic group values are defined on the Academic Group Table page.

Subject Area Select the subject area of the course offering. Subject area values are defined on the Academic Subject Table page.

Campus Select the campus where your institution offers the course. If the course is offered at one campus, you should place a value in this field. If the course can be offered at multiple campuses, leave this field blank.

Academic Organization The system populates this field by default from the academic organization linked to the subject on the Academic Subject Table page. You can override the value.

Academic Career Select the academic career to which this course offering belongs. The system automatically displays the default values of the Dynamic Class Data Rule, Allow OEE Enrollment, and OEE Dynamic Date Rule fields according to your settings for these fields on the Academic Career Table component. The default values of these fields vary depending on the academic career you select and the effective date of the course. Academic career is important because it specifies which students can enroll in the class (per the Academic Career Pointers page specifications), as well as which grading bases are available.

Tuition Group

Regardless of the tuition group that you enter on this page, the system charges all students tuition based on their own tuition group.

Use this field to designate a specific group of students that you want to charge additional course fees for the course.

Dynamic Class Date Rule

If you have specified a dynamic class data rule for the academic career to which you assign this course offering, the system displays that rule by default in this field. You can override the default value. Select a dynamic class date rule to have the system assign that rule by default to all dynamic class sections of this course offering that you schedule (excluding open entry/open exit sections). Attaching your rule to the course offering rather than the class section ensures consistency and eases maintenance because you only have to attach the rule to a course one time (to apply to all class sections), rather than having to attach a rule to each course offering that you schedule. The system requires dynamic date calculation for each class section that you schedule for this course offering. After you schedule the class sections, you can run the Dynamic Class Dates process to calculate landmark dates for each class section. The process automatically uses the rule that you specify here for all dynamic date class sections. You can override this default rule on a section-by-section basis through the Dynamic Class Date page. This field prompts you with only the dynamic class data rules that have not been designated for OEE enrollment on the Dynamic Class Dates page. If you leave this field blank and schedule the course within a dynamic date session, you receive a warning message indicating that a rule has not been defined. You need to define a rule on the Dynamic Class Dates page.

Allow OEE Enrollment (allow open entry/exit enrollment)

The system assigns the value of this check box by default based on the Allow OEE Enrollment check box on the Academic Career Table page for the academic career with which you have associated this course offering. You can override this default on an offering-by-offering basis. Select this check box to attach a dynamic date rule to the offering, thus enabling students to enroll in OEE class sections of this course offering. The OEE Dynamic Date Rule field becomes available for edit. If you do not select the check box, you can always define the rule on the Dynamic Class Dates page.

OEE Dynamic Date Rule (open entry/exit dynamic date rule)

The system assigns the value of this field by default based on the OEE Dynamic Date Rule field on the Academic Career Table 2 page for the academic career with which you associate this course offering. An open entry/exit (OEE) dynamic date rule is a dynamic class date rule that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an open entry/exit class. This field is available for edit only if you select the Allow OEE Enrollment check box for this course offering.

Select an OEE dynamic date rule to have the system assign that rule by default to all OEE class sections of this course offering that you schedule. Attaching your rule to the course offering rather than the class section ensures consistency and eases maintenance because you only have to attach the rule to a course one time (to apply to all class sections), rather than having to attach a rule to each course offering that you schedule. The system thus automatically requires dynamic date calculation for each OEE class section that you schedule for this course offering. After you schedule the class sections, you can run the Dynamic Class Dates process to calculate landmark dates for each class section. The process automatically uses the rule that you specify here for all OEE class sections. You can override this default rule on a section-by-section basis through the Dynamic Class Data page. The system prompts you with only the dynamic class data rules that have been designated for OEE enrollment on the Dynamic Class Dates page.

If this field is blank and you schedule the course within an OEE session, you receive a warning message that indicates a rule has not been defined. You can then save the page, and define the rule on the Dynamic Class Dates page.

Course Approved

Select the course approved status. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Select *Pending* or *Denied* to prevent anyone from scheduling the class—the system does not list the course in the class scheduling function. Select *Approved,* and select the Allow Course to be Scheduled check box to enable scheduling of the course offering.

Allow Course to be Scheduled

Select this check box so that the course can be scheduled for a term. A course can only be scheduled for a term if you select this check box, and set the Course Approved field to *Approved.*

Note. For courses that are set up solely as transfer articulation courses, set the Course Approved field to *Approved,* but clear the Allow Course to be Scheduled check box. This ensures that you never accidentally schedule the course.

Catalog Print

Select to display the course offering in the course catalog report.

Print Instructor in Schedule

Select to display all of the assigned instructors' names in the schedule of classes report.

Schedule Print

Select to display the course offering in the schedule of classes. The system selects this check box by default.

Schedule Term Roll

Select to enable the prior term copy function for this course offering.

See Chapter 17, "Managing the Schedule of Classes," Copying the Prior Term, page 420.

Use Blind Grading

Select to enable grade rosters for blind grading. The system populates this field by default from the Academic Subject Table page.

When you generate grade rosters for a course that invokes blind grading, instead of student names on the roster, the system generates random numbers.

See Chapter 33, “Grading Students,” page 727.

GL Interface Required

Select to include this class in the GL Interface process. If you select this check box, the system requires you to enter the necessary data into the GL Interface page of this component.

Split Ownership

Select if multiple academic organizations own the course. If you select this check box, the Owner group box becomes available for entry.

Enrollment Requirement Group

Use the Enrollment Requirement Group group box to link requisites to courses.

Enrollment requirement groups can consist of a variety of elements: courses, units, GPA, and so on.

Requirement Group

Enrollment requirement group values are defined on the Course Requisite page.

Long Description

The long description of the enrollment requirement group.

Click the detail button to view the enrollment requirement group detail.

CIP and HEGIS Codes (classification of instructional programs and higher education general information survey codes)

Use the CIP and HEGIS Codes group box to link CIP and HEGIS codes to course offerings.

CIP Code

Select the CIP code for the course. The system prompts you from the CIP Code Table page.

HEGIS Code

Select the HEGIS code for the course. The system prompts you from the HEGIS Code Table page.

Owner

The system assumes a course offering has a single academic organization owner, unless you indicate split ownership on this page. If you select the Split Ownership check box, the Owner group box becomes available for entry. Use this group box to link course offerings to multiple academic organizations. Course ownership data is tracked for reporting and analysis purposes at the course offering level.

Academic Organization

Select academic organization owners of the course offering. The system prompts you from the Academic Organization Table page.

Percent Owned

Enter the percentage of ownership. The total percentage must equal *100.*

Examples of Equivalent and Cross-Offered courses

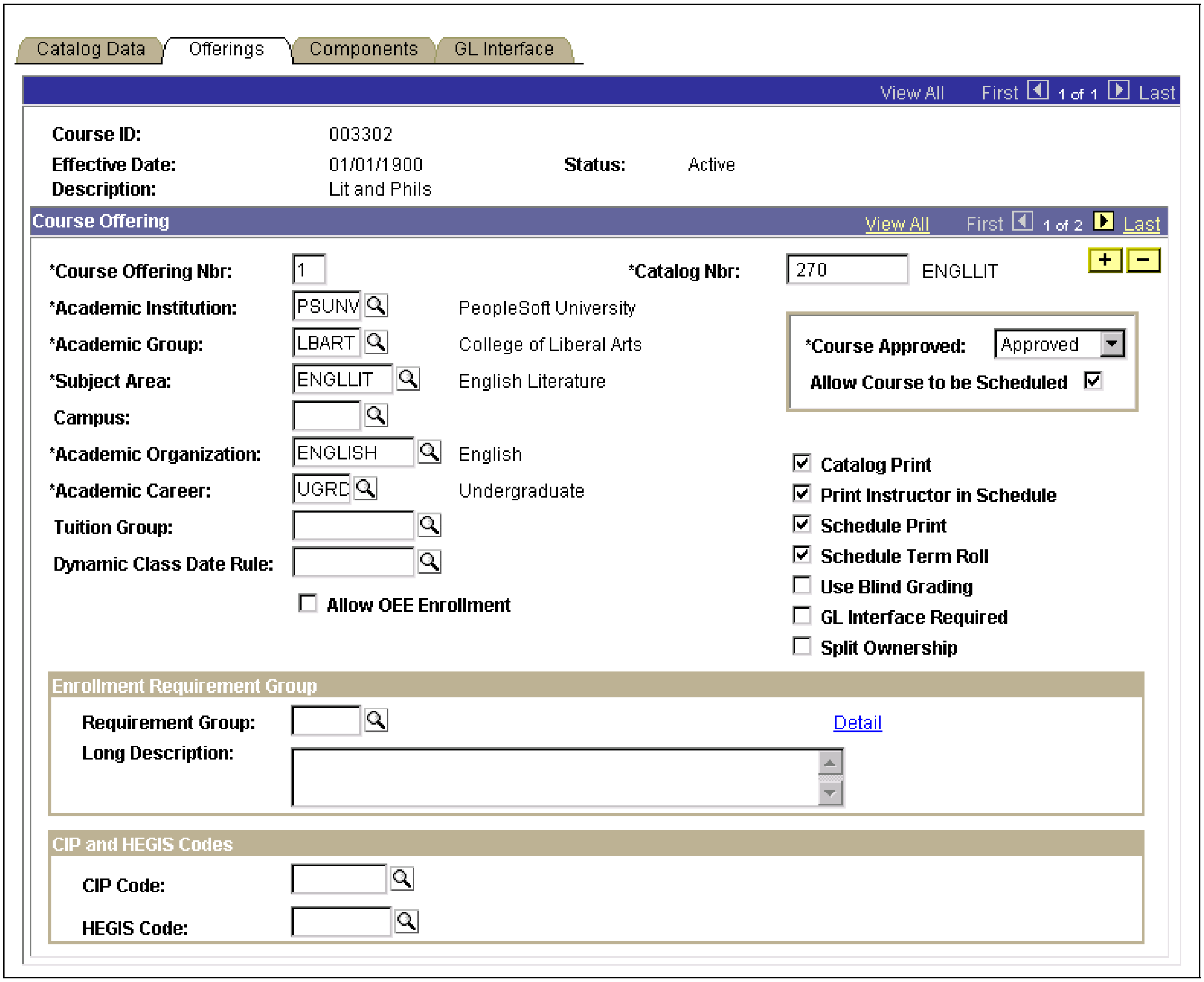
Equivalent courses, unlike cross-listed courses, can have different requisites, requirements, and so on. Each equivalent course has a unique course ID number. Use the Course Equivalency component to create Equivalent Course Groups.

Define cross-offered courses on the Course Catalog - Offerings page. Cross-offered courses have the same course ID number; therefore they possess the exact same Catalog Data page information. When classes are scheduled, each class is associated with a single offering.

Note. Repeat checking and multiple enrollment rules apply across all offerings of the course because the same course is offered in every case.

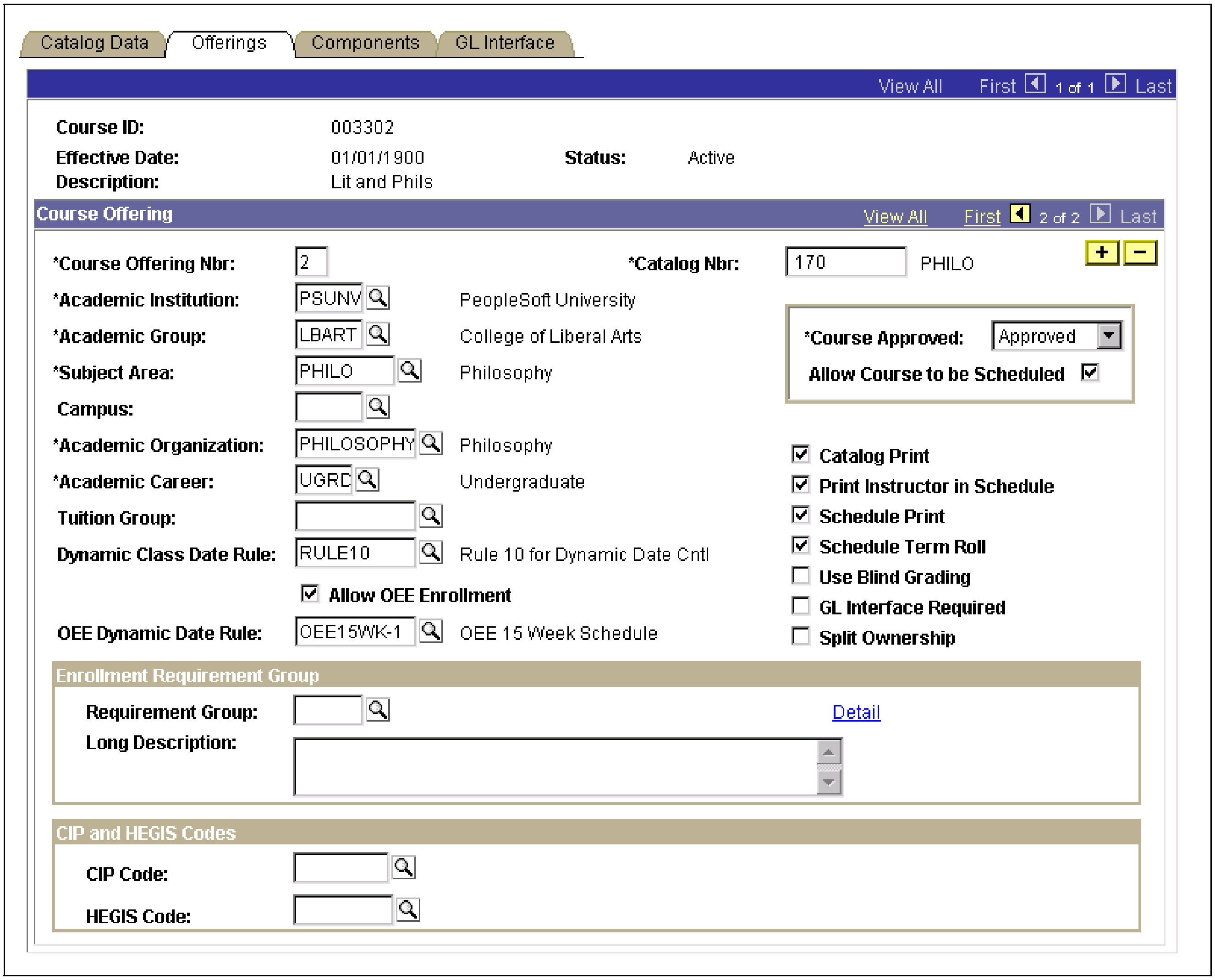
In the following page shots, we've defined course ID number *003302 Literature and Philosophy.* It is a cross-offered course in both the English and Philosophy Departments. In all ways the two course offerings are exactly the same. They possess the same description, equivalencies, and so on. On the Offerings page, we use the course offering number to distinguish the two offerings.

In course offering number *1,* we indicate that *Literature and Philosophy* is listed under the English Literature Subject Area, Catalog Number *270.*



Course Offering Number 1, Course Catalog Offerings page (CRSE_CATALOG_OFFER)

Add another row for course offering number *2.* The second offering of *Literature and Philosophy* is listed under the Philosophy Subject Area, Catalog Number *170.*

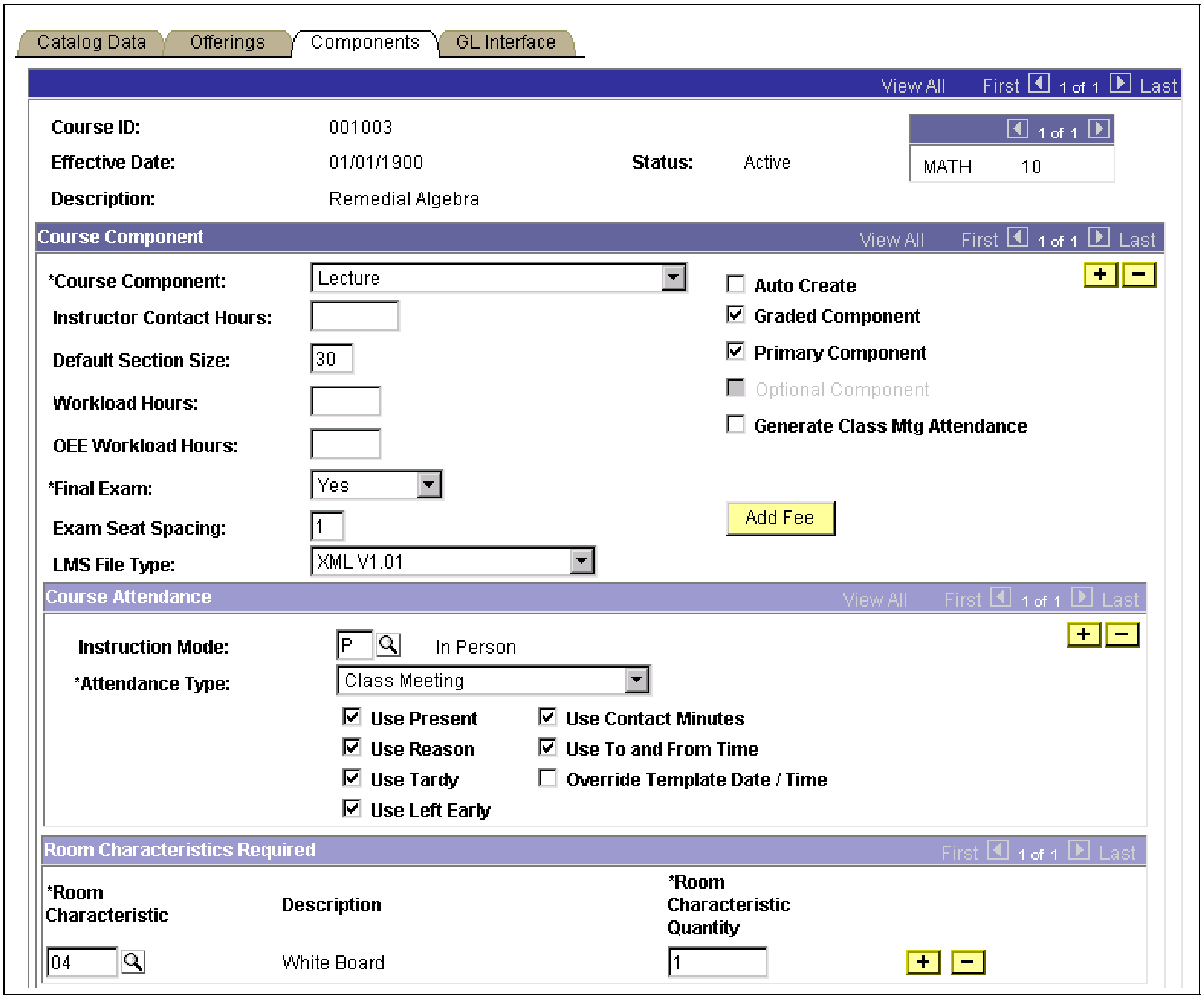


Course Offering Number 2, Course Catalog Offerings page (CRSE_CATALOG_OFFER)

Select the Catalog Print and Schedule Print check boxes in order to enable printing of both offerings of the course in the Catalog and Schedule.

Defining Course Components

Access the Components page.



Course Catalog - Components page

Course Component

Select a course component for the offering. Values for this field are delivered with your system as translate values. You can modify these values. The course component indicates the parts of the course offering *(lecture, laboratory, seminar, and so on)*. One course offering can have multiple components.

Instructor Contact Hours

Enter the contact hours you want to record for the instructors teaching this component of the course. You can also assign specific instructors and corresponding contact hours when scheduling classes on the Schedule of Classes - Meetings page. Use this field only if you want to report contact hours manually.

The Instructor Workload feature does *not* reference this free form field.

Default Section Size

Enter the default section size. You can override section sizes in the schedule of classes. The system populates the value in this field by default to the Requested Room Capacity field and the Enrollment Capacity field.

Workload Hours

If you want to track Instructor Workload based on course component workload hours, enter a Workload Hours value for the course component. The system uses the value that you specify here to populate the same fields on the Class Associations − Class Components page when you schedule a new course. In other words, if you set the lecture Workload Hours to 3 on the Course Catalog - Components page, then whenever someone schedules a lecture for this course, the lecture component defaults to 3 workload hours on the Class Components page. Similarly, if you set the laboratory component to 1 Workload Hour on the Components page, then whenever someone schedules a laboratory for this course, the laboratory component defaults to 1 workload hour on the Class Components page. The user can modify the component values on the Class Components page if necessary. This field is optional.

OEE Workload Hours (open entry/open exit workload hours)

If you want to track Instructor Workload based on course component OEE workload hours, enter an OEE Workload Hours value for the course component. The value you specify here represents the number of workload hours for the entire course, unlike regular workload hours, which represent weekly hours for the course. The system populates the value in this field by default to the same components on the Class Associations − Class Components page when you schedule a new course. In other words, if you set the lecture OEE Workload Hours to 45 on the Components page, then whenever someone schedules a lecture for this course, the lecture component defaults to 45 OEE workload hours on the Class Components page. OEE Workload Hour on the Components page, then whenever someone schedules a laboratory for this course, the laboratory component defaults to 15 OEE workload hour on the Class Components page. You can modify the component values on the Class Components page if necessary. This field is optional.

Final Exam

Select whether a final exam is given in the course. The value you enter here defaults to the Schedule of Classes. Final exam values are delivered with your system as translate values. Add as many values to the translate table for the final exam as needed. The only value that you must not remove from the translate table is *Yes,* which has coding attached to it. Your choices are:

Yes: The *Yes* value enables block final exam scheduling. This value cannot be modified without programming effort.

No: Indicates that this component has no final exam. Entering *No* eliminates this component from the block exam scheduling process.

Last Class: Indicates that a final exam is taken in the last regularly scheduled class (as opposed to during final examination week). Entering *Last Class* eliminates this component from the block exam scheduling process.

Exam Seat Spacing

If you select *Yes* in the Final Exam field, the Exam Seat Spacing field becomes available for entry. Enter the number of spaces between student's seats during the exam. For example, enter *2* to have two empty seats between each student taking the exam. This value has no programming tied to it. Use this field for your information or for third-party interface.

LMS File Type

If your institution utilizes the learning management system (LMS) interoperability feature, enter the LMS file type for the interface. The value entered here defaults down to the schedule of classes when you schedule a class, but you can override it. If this field is blank, any time you schedule a class for this course, the LMS file type defaults to the setting on the Academic Institution 3 page.

Your choices are XML V1.01, Blackboard CourseInfo 4, and WebCT API Input Format.

Auto Create

Select for each component to have the system automatically create that component of the course in the schedule of classes. This saves you data entry and ensures that the system schedules at least one section for each required component.

See Chapter 17, "Managing the Schedule of Classes," Scheduling New Classes, page 351.

Graded Component

Select to enable grading of this component. Only one component can have a final grade. The value you select for this course offering appears by default on the (Schedule New Course, Schedule of Classes) Basic Data page when you schedule a class section for this course offering.

Primary Component

Select whether this is the primary component of the course. If you are using the Dynamic Class Dates feature, it is mandatory that you select a primary component for the course, even if you only have one component. The Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses the primary component value on the Class Associations - Class Components page.

Optional Component

If available for entry, select in order for the system to require that students enroll in this component. If you clear this check box, the system requires that students enroll in the component.

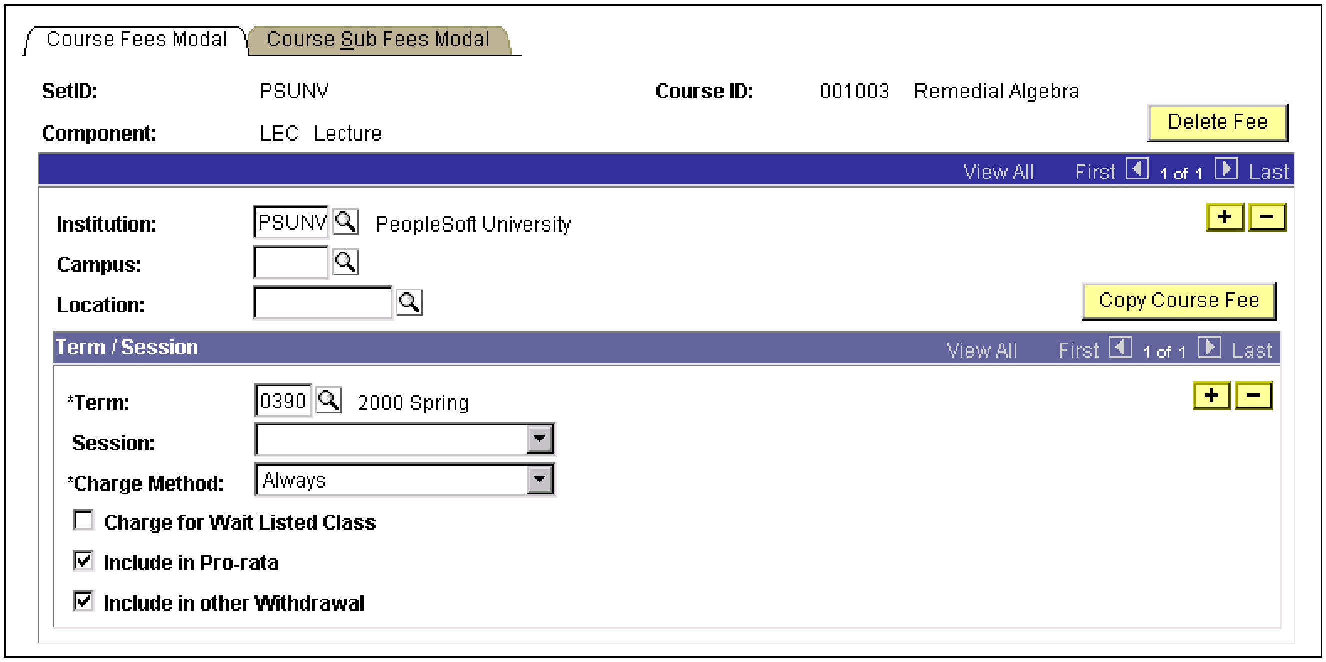
Include in Dynamic Date Calc (include in dynamic date calculation)

Select to include this component of the course offering, in addition to the primary component, in the Dynamic Class Dates process. The system automatically selects and makes unavailable for edit this check box for the primary component of a course because the Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. This check box is optional for other components. The value here appears by default on the corresponding field for all class sections of the component that you schedule on the Basic Data page. For non-primary components, you can override the default value on a section-by-section basis.

Generate Class Mtg Attendance (generate class meeting attendance)

Select to indicate that you want the system to always generate attendance rosters for all classes your institution schedules for this course component. This value defaults to the Schedule of Classes where you can override this setting. Selecting this check box marks the class so that when you generate attendance rosters through the Attendance Roster Generator page you have the option to limit processing to only the classes that have this check box selected and that meet your processing criteria. If you clear this check box on the Attendance Roster Generator page, the generator creates attendance rosters for all classes that meet your processing criteria, regardless of the check box setting. When you generate attendance rosters through the Class Attendance page and this check box is selected for a scheduled class, the setting has no effect on processing.

Add Fee Click to add an additional fee for the course component and to access the Course Fees Modal page.

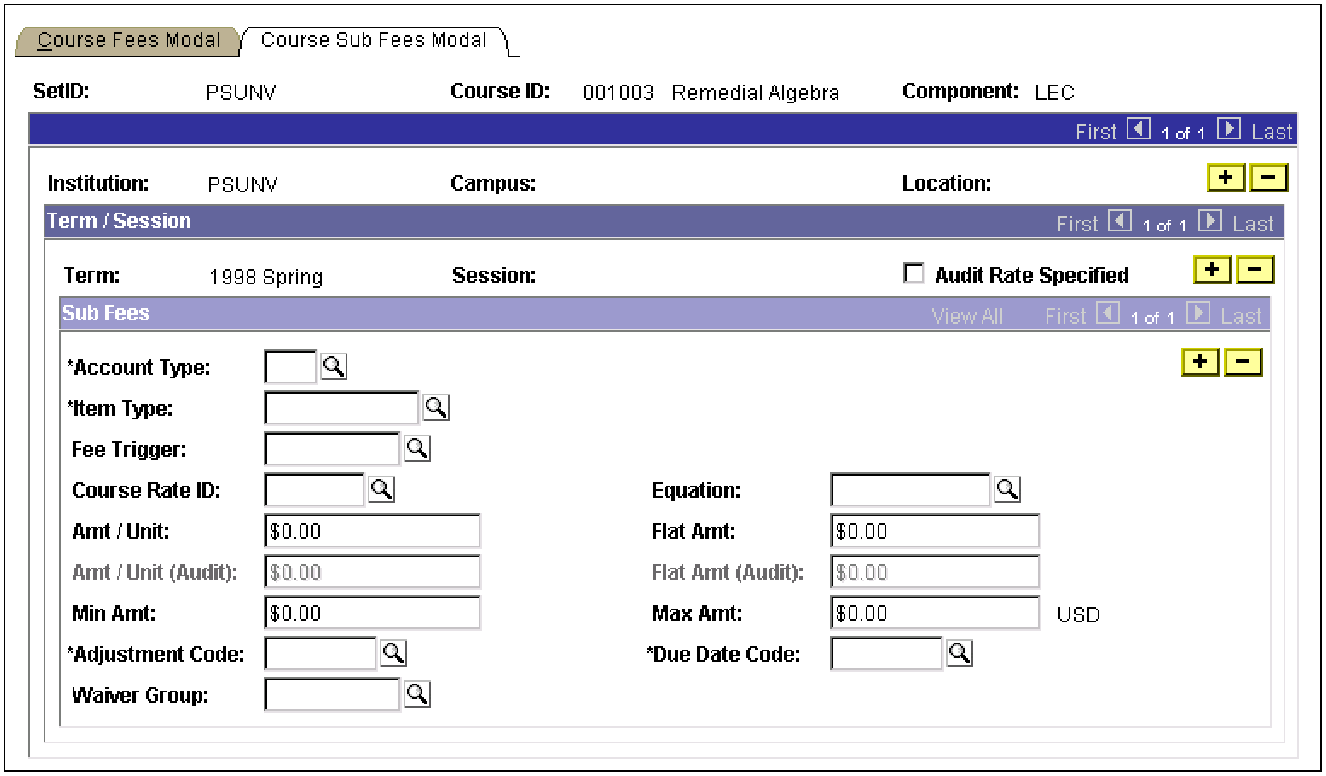


Setting Course Fees on the Course Fees Modal page (CRSE_FEE_TBL_MDL)

Note that the additional fee is attached to the course component you specify.

See *PeopleSoft 8 SP1 Student Financials PeopleBook*, “Calculating Tuition and Fees”.

Select the Course Sub Fees Modal tab to define the detail of the additional fee.



Defining Course Fees on the Course Sub Fees Modal page (CRSE_SUBFEE_TBL_MD)

On this page, you enter the Account Type, Item Type, Fee Trigger, and other fee detail information.

See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Calculating Tuition and Fees".

Use the Course Component Attendance group box to select the instruction mode, define attendance types, and to select the data you can track on rosters with each attendance type.

Instruction Mode

The instruction mode indicates whether the course component is taught *In Person* or using *Interactive TV, World Wide Web, Correspondence,* and so on. The instruction mode relates to the attendance type. You can indicate an instruction mode, then select attendance type values for the course component that relate only to this instruction mode. For example, by selecting the *In Person* instructor mode, you can select an attendance type that applies only to the *In Person* instruction mode. If you leave the Instruction Mode field blank, the attendance types that you define for the course component applies to all instruction modes. When you create and update attendance rosters, only the attendance type values that relate to the instruction mode for the class are available for you to use. Instruction modes for classes are set on the Schedule of Classes - Basic Data page. Instruction mode values are defined on the Instruction Mode page.

Attendance Type

Select each attendance type that your institution might use for the course component. The attendance type indicates the type of class meeting attendance roster you want to generate such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.* Add rows to for additional attendance types. When you track attendance, the system prompts you with only the attendance type values that your institution defines for the course component. Values for this field are delivered with your system as translate values. You can modify these values.

Note. We recommend that you at least specify the attendance type value that your institution has selected on the Academic Institution Table 3 page to use whenever you generate attendance rosters, as well as the fields you want the system to use for this component's attendance type. Although you can generate attendance rosters for a course component without defining attendance type values and their associated fields, the system only creates a default attendance roster that includes: the Template Number for the class meeting attendance roster; the Attendance Type and its description; the Attendance Date; and each student's ID, name, and career. You then have to return to the Components page and define these values anyway for your institution to be able to track student attendance.

For each attendance type of the course component, select the fields you want the system to use when generating class attendance rosters. You can set up the system to generate attendance rosters with as few or as many fields as you want to appear for each class section. When you generate attendance rosters, the available fields that appear on the attendance rosters for each attendance type depend on the options you select for each attendance type of the course component. Your choices for any given course component's attendance type are:

Use Present Attendance rosters have a Present check box on them.

Use Reason Attendance rosters have a Reason field on them. You can use the reason field to describe a reason for why a student is present, tardy, leaves early, or any other reason your institution wants to track.

Use Tardy Attendance rosters have a Tardy check box on them.

Use Left Early Attendance rosters have a Left Early check box on them.

Use Contact Minutes Attendance rosters have a Contact Minutes field on them. The system populates the contact minutes time by default to the total minutes of the class meeting. The system determines this value based on the Class Meeting pattern that your institution has set up for the class in the Schedule of Classes.

Use To and From Time Attendance rosters have a to and from time field to designate the start and end time of a class meeting. The system determines this value based on the class meeting pattern that your institution has set up for the class in the Schedule of Classes.

Override Template Date/Time Attendance rosters have an attendance date field on them. Also, you can override the attendance date, from time, and to time values that appear on the attendance rosters. Otherwise, the corresponding fields that appear on an attendance roster template control the attendance date, from time and to time values that appear for each student on the attendance rosters. A template simply identifies an attendance roster as unique.

Room Characteristics Required

Room Characteristic
Select the room characteristics that you require for the course component. Room characteristic values are defined on the Room Characteristic Table page. Characteristics you enter here default to the schedule of classes. Insert rows to add additional characteristics. This field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum number of room characteristics for Schedule25 is 96. Therefore, be sure you select values between 01 and 96 if you use Schedule 25.

Room Characteristic Quantity
Enter the quantity of each room characteristic that you require.

Interfacing Course Offerings with General Ledger

Access the GL Interface page.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, "Using GL Interface Processing"

Creating Course Equivalency Groups

Course equivalency groups link different course ID numbers as equivalent for requisite checking purposes. The courses themselves can possess different components, requisites, topics, and so on. Equivalent course groups are for different course IDs and are therefore different from "multiple-offering courses."

Here's how to create a course equivalency group:

1. Define an equivalent course group in the Course Equivalencies page.
2. Add courses to the equivalency group on the Catalog Data page.
3. Return to the Course Equivalencies page and click the Fetch Equivalencies button in order to review the group of equivalent courses.

See Also

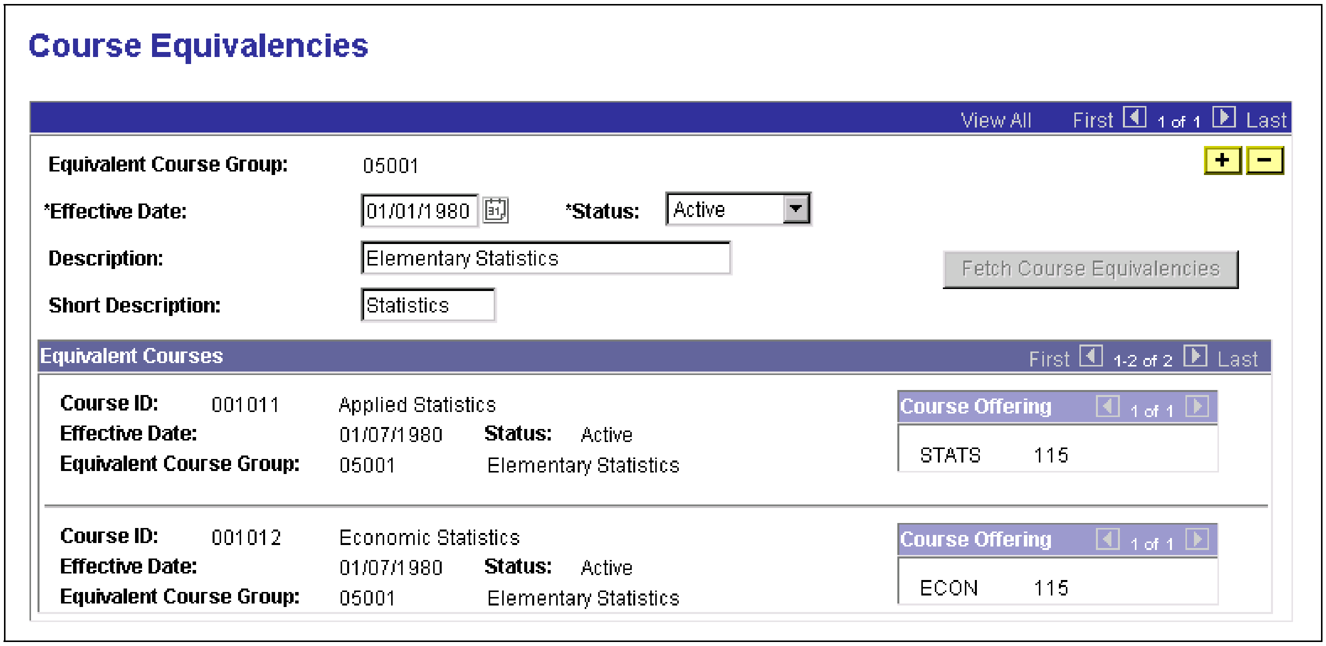
Chapter 4, "Setting Up the Course Catalog," Defining Course Catalog Data, page 67

Pages Used to Create Course Equivalency Groups

Page Name	Object Name	Navigation	Usage
Course Equivalencies	CRSE_EQUIV	Manage Student Records, Establish Courses, Use, Course Equivalencies, Course Equivalencies	Define the course equivalency group.

Creating a Course Equivalency

Access the Course Equivalencies page.



Course Equivalencies page

Effective Date

Enter an effective date for this equivalent course group. The effective date defines when the status you select is valid. Use a new effective date each time you make a change to an equivalent course group. Insert new rows as needed, and modify the record. This way you can track historical equivalent course changes.

Status

Select a status for this equivalent course group. Select *Active* when adding a new equivalent course group. The *Inactive* option should only be used if your institution will no longer be using this equivalent course group.

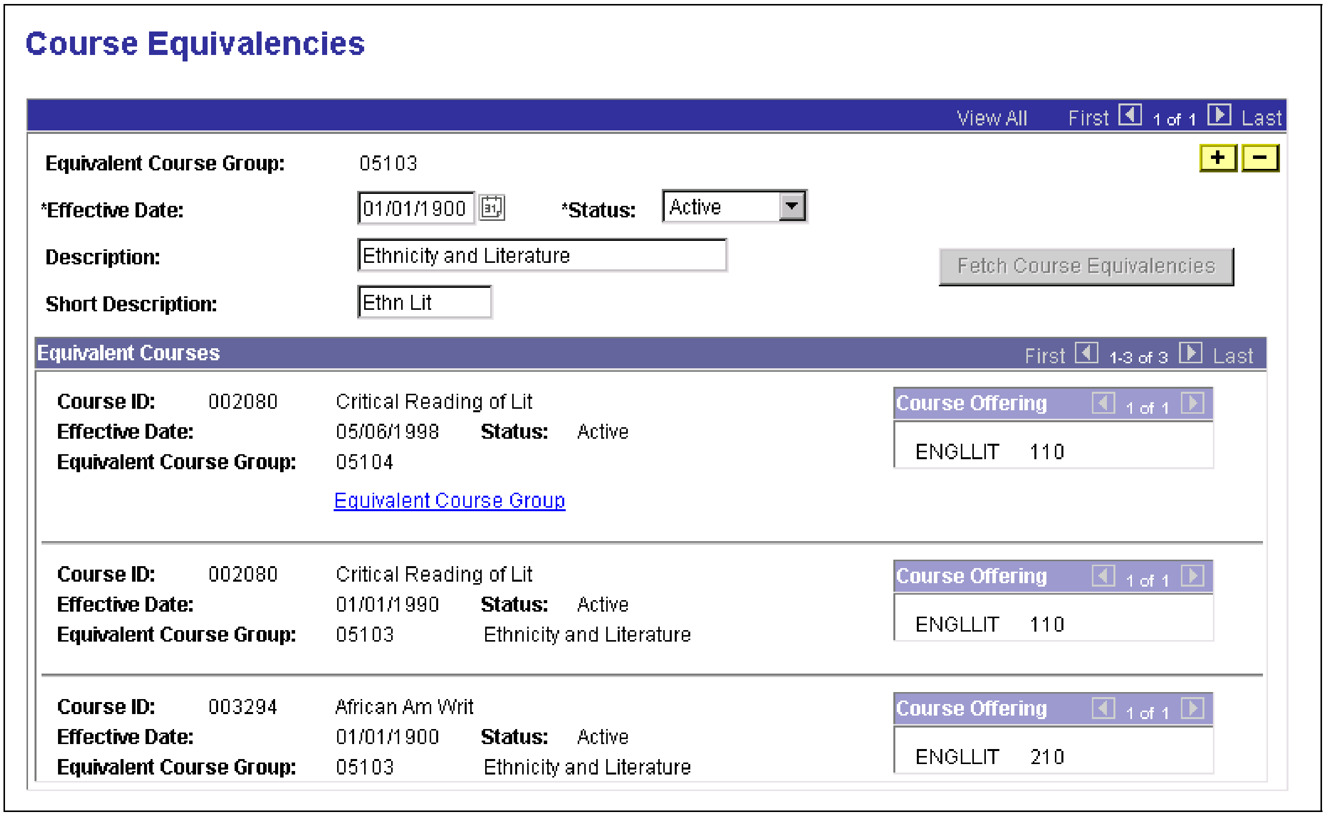
Note. If you want to inactivate an equivalent course group, you need to delete that equivalent course group number from each course to which it is attached on the Catalog Data page as well as change the status to *Inactive* on the Course Equivalencies page.

Description and **Short Description**

The descriptions of the equivalent course group.

Fetch Course Equivalencies

Once you attach courses to this equivalent course group on the Catalog data page, click this button to view all courses linked to the equivalent course group.



Assigning Courses to a New Equivalent Course Group (CRSE_EQUIV)

The system displays an effective date and equivalent course group for every course. To determine when data for an effective-dated row is superseded, look at the next row. In the exhibit, the system shows that course ID *002080* was part of Equivalent Course Group *05103* until *05/06/1998.* As of *05/06/1998,* course ID *002080* became associated with Equivalent Course Group *05104.*

Click the Equivalent Course Group link to view other equivalent course groups for a specific course.

Viewing Course Catalog Summary Information

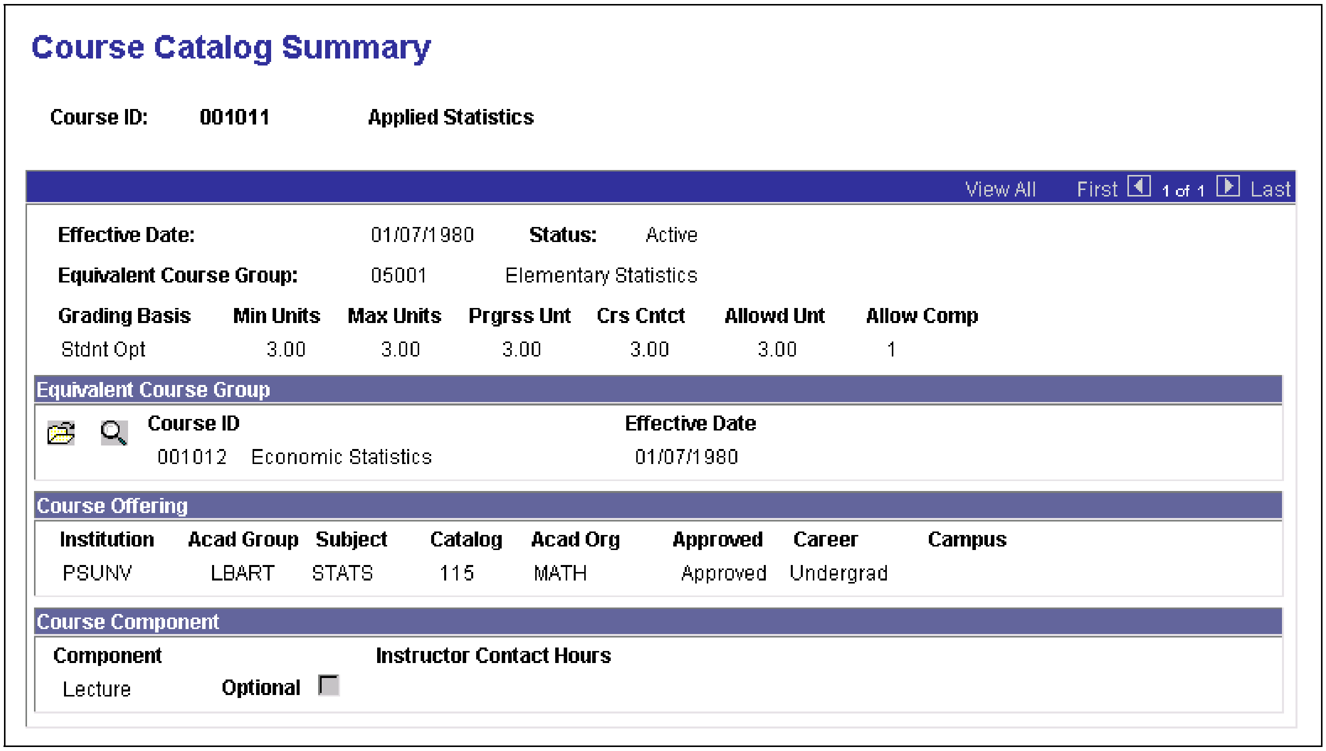
This section discusses how to review course catalog summaries.

Pages Used to View Course Catalog Summary Information

Page Name	Object Name	Navigation	Usage
Course Catalog Summary	CRSE_CATALOG_SUM	Manage Student Records, Establish Courses, Inquire, Course Catalog Summary, Course Catalog Summary	Use the Course Catalog Summary page to view a summary of course offerings.

Reviewing Course Summaries

Access the Course Catalog Summary page.



Course Catalog Summary page

	If the course is a part of an equivalent course group, the equivalent course group appears. Click the Open button to toggle between the equivalent courses.
	Click the Detail button to go the Course Catalog - Catalog Data page for the course. You can use this button to view further detail or to modify data for the course.

See Also

Chapter 4, “Setting Up the Course Catalog,” Creating Course Equivalency Groups, page 89

Chapter 4, “Setting Up the Course Catalog,” Creating Course Offerings, page 66

Printing the Course Catalog

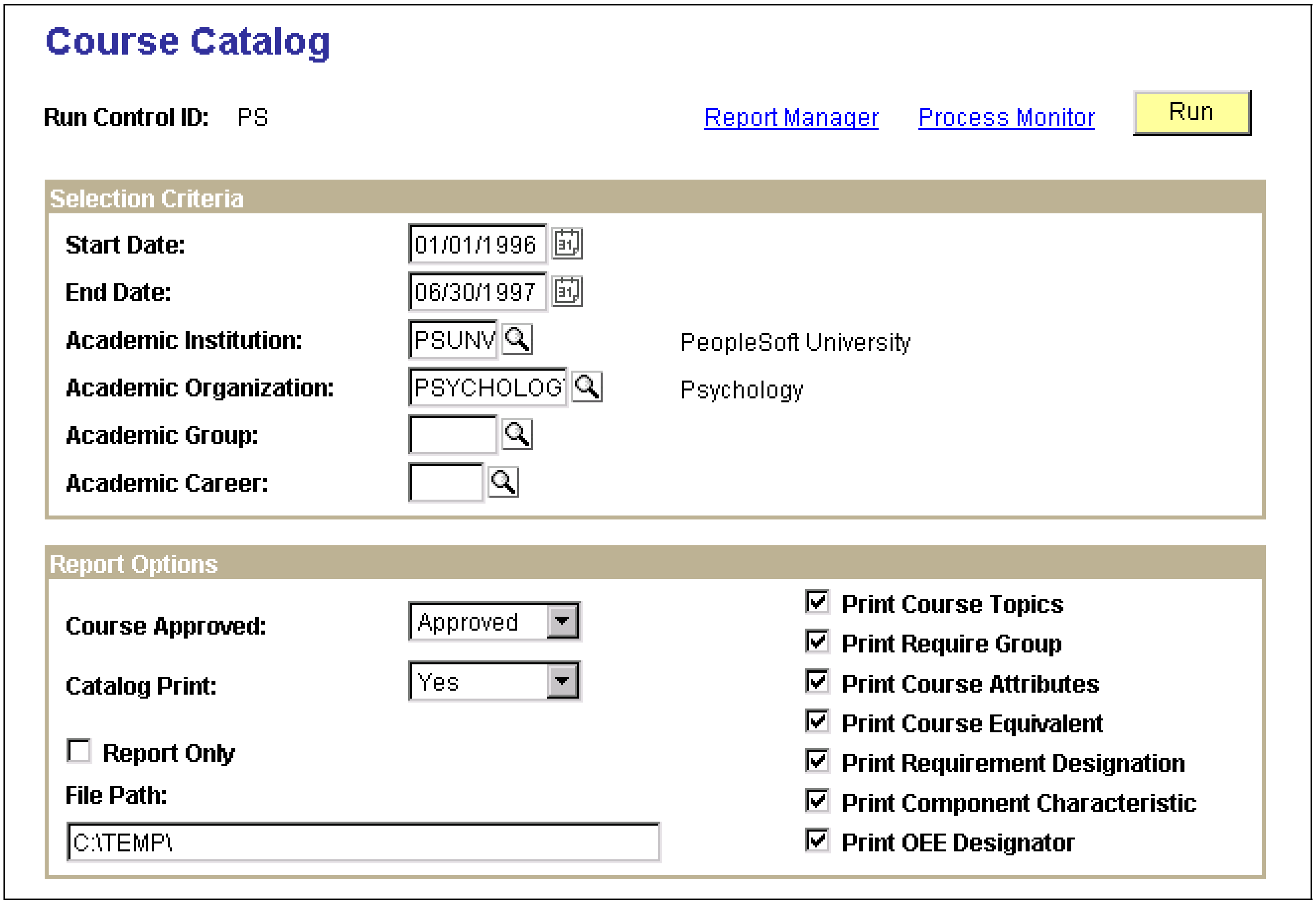
This section discusses how to print the course catalog report.

Pages Used to Print the Course Catalog Report

Page Name	Object Name	Navigation	Usage
Print Course Catalog	RUNCTL_SRYCATLG	Manage Student Records, Establish Courses, Report, Course Catalog, Course Catalog	Use the Print Course Catalog page to print the course catalog (SR301 Report).

Entering Course Catalog Report Parameters

Access the Course Catalog page.



Course Catalog page

Start Date and **End Date**	Enter a start and end date. These dates are the effective dates of the course offerings. They are required fields. The system prints all active courses that are greater than or equal to the start date, and less than or equal to the end date.
Academic Institution	The system populates the academic institution field by default to the value on the User Defaults 1 page.
Academic Organization	Select the academic organization. You are prompted by the Academic Organization Table page.
Academic Group and **Academic Career**	Enter the academic group and academic career if you want to limit the scope of the report. Academic group values are defined on the Academic Group Table page. Academic Career values are defined on the Academic Career Table page.
Course Approved	Select whether you want to display *Approved, Denied*, or *Pending* courses. To report courses of all three types, run three reports, each with a different *Course Approved* field value.
Catalog Print	Select whether you want to view text designated as catalog print text. If you select *Yes,* all courses with the Catalog Print check box selected in the Course

Catalog Offerings page display on the report. If you select *No,* the courses that do not have the Catalog Print check box selected display on the report. If you select *All,* all the courses are displayed, regardless of the check box setting.

Report Only

Clear this check box to specify that you want to create a Course Catalog report and send the Course Catalog report to your file path location in csv format. Select this check box to create a Course Catalog report, without creating a csv file. If you select this check box, the File Path field becomes unavailable.

File Path

If you clear the Report Only check box, this field is available. In addition to sending report output for this process to a file (through setting preferences in the PeopleSoft Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate Read/Write permission. If you can not locate such a folder, consult your system administrator.

Select the print options to display the described detail on the report. If you clear them, the detail does not appear on the report.

Run

Click to run the report using PeopleSoft Process Scheduler. We recommend that you set the Type to *Web,* and the Format to *PDF.*

Searching for Courses

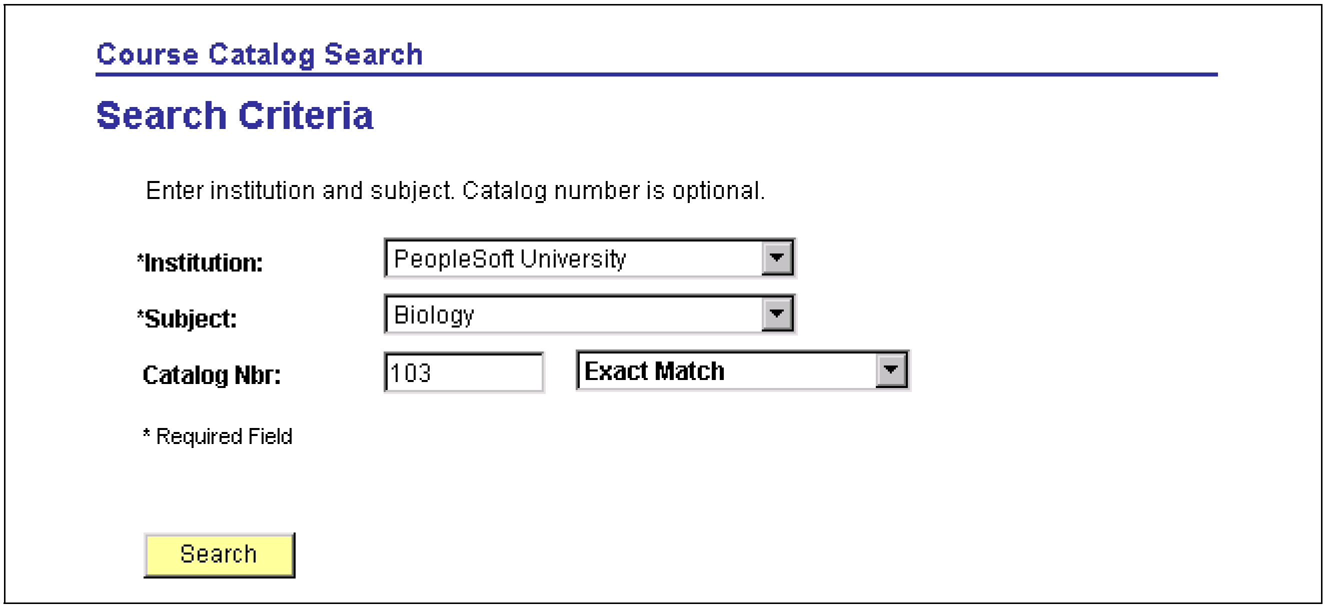
This section discusses how to search for courses in the course catalog.

Pages Used to Search for Courses

Page Name	Object Name	Navigation	Usage
Course Catalog Search - Search Criteria	CATLG_SRCH_BASIC	• Manage Student Records, Establish Courses, Inquire, Catalog Search, Course Catalog Search • Manage Student Records, Manage Academic Records, Inquire, Catalog Search, Course Catalog Search • SA Self Service, Community Access, Tasks, View Course Catalog, Catalog Basic Search • SA Self Service, Learner Services, Catalog, View Course Catalog, Catalog Basic Search • SA Self Service, Learning Management, Catalog, View Course Catalog, Catalog Basic Search	Search for courses in the catalog. Enter search criteria and retrieve your results. This search component is also accessible to prospects, applicants, students, and alumni through the following separately licensed collaborative applications: Learning Management, Learner Services, and Community Access. See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.
Course Catalog Search - Catalog Search Results	CATLG_SRCH_RSLT	• Manage Student Records, Establish Courses, Inquire, Catalog Search, Catalog Search Results • Manage Student Records, Manage Academic Records, Inquire, Catalog Search, Catalog Search Results • SA Self Service, Community Access, Tasks, View Course Catalog, Catalog Search Results • SA Self Service, Learner Services, Catalog, View Course Catalog, Catalog Search Results • SA Self Service, Learning Management, Catalog, View Course Catalog, Catalog Search Results	Use the Course Catalog Search - Catalog Search Results page to view all courses that match your criteria.

Entering Course Catalog Search Parameters

Access the Course Catalog Search - Search Criteria page.

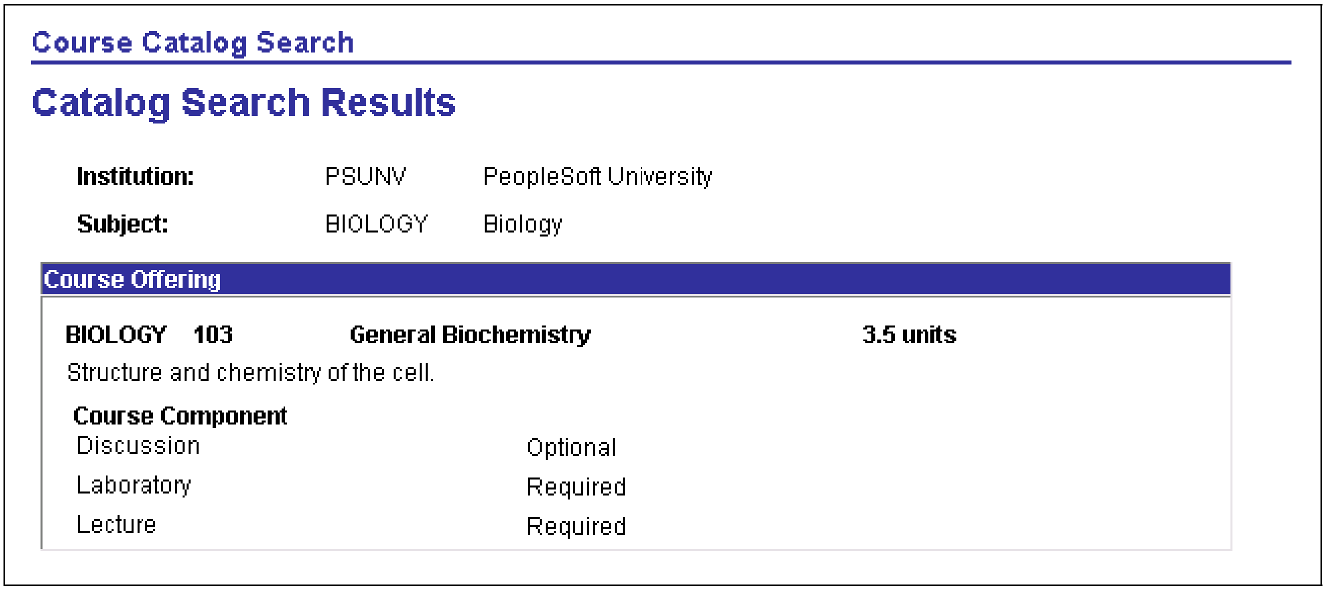


Course Catalog Search - Search Criteria page

Institution	Enter the institution for which you want to search for courses.
Subject	Enter the subject area for which you want to search for courses.
Catalog Nbr (catalog number)	Enter a catalog number, or some portion thereof. In conjunction with the catalog number, you can instruct the system to identify an *Exact Match* or search using your catalog number as a *Wildcard* (returns all values that match portions of the catalog number data you specify.)
Search	Click the Search button to view your results on the Course Catalog Search - Catalog Search Results page.

Viewing Course Search Results

Access the Course Catalog Search - Catalog Search Results page.



Course Catalog Search - Catalog Search Results page

The system displays all of the courses that match your criteria.

CHAPTER 5

Setting Up Enrollment Requisites

This chapter gives an overview of enrollment requisite setup and maintenance, and lists the data that you must set up prior to setting up enrollment requisites. Specifically, this chapter discusses how to:

- Define enrollment requirement groups.
- Define enrollment requirements.
- Define enrollment course lists.
- View enrollment requisite summaries.
- Process the Enrollment Advisement report.

Understanding Enrollment Requisites

In PeopleSoft Student Records there are two levels on which you create enrollment requisites and requirements:

1. Enrollment Requirement Groups, which handle requirements for specific courses or class reserve capacities.
2. (Optional) Enrollment Requirements (with or without course lists), which handle complicated requisite rules.

Most likely, you can meet 90 percent of your requisite needs with the Enrollment Requirement Group component alone.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Setting Up Academic Requirement Groups”

PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Setting Up Academic Requirements”

PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Setting Up Academic Course Lists”

Prerequisites

Depending on the structure and complexity of your enrollment requirement groups, you must first define the following data:

- Academic institutions.
- (Optional) Enrollment requirements.
- (Optional) Enrollment course lists.
- (Optional) Entity groups.
- (Optional) Requirement designations.

- (Optional) Courses.

Defining Enrollment Requirement Groups

This section provides an overview of Enrollment Requirement Groups and discusses how to:

- Define enrollment requirement group descriptions.
- Define overall requisite parameters.
- Define requisite details.
- Define requisite detail level parameters.
- Set up various types of enrollment requisites.

Understanding Enrollment Requirement Group Setup

Enrollment requirement groups encompass requisites based on a variety of factors including grade point average and units, courses, and much more. Virtually every pre-requisite or co-requisite your institution has for courses can be satisfied with the Enrollment Requirement Group component alone.

Enrollment requirement groups are also used for reserve capacity portions of classes. You can create enrollment requirement groups which are later attached to classes designating a reserve capacity for students who meet a certain criteria (for example, you can set aside 10 seats in a class for students with a certain academic level, cumulative GPA, number of units earned, and so on).

You attach enrollment requirement groups to courses in the course catalog, and you can override these requisite rules or append them on a class by class basis when you create the schedule of classes. One course catalog offering can refer to one enrollment requirement group rule, but that rule can contain multiple course requisites and non-course enrollment restrictions (such as condition requirements). Multiple course offerings can use the same enrollment requirement group or different ones. Re-usability, and as such a reduction in data entry and maintenance, is a valuable aspect of this feature.

Of course, there are a number of ways you can structure your course requisites. Many times there is more than one "correct" way to structure requisites using a combination of enrollment requirement groups and enrollment requirements (which we review later in this section). We'll review examples of course requisite setup in this section as well.

Here's how to create a simple enrollment requirement group or reserve capacity:

1. Create a description of the enrollment requirement group on the Course Requisite page.
2. Determine if parameters such as minimum GPA, units, or number of courses are an attribute of the requirement on the Requisite Parameters page.
3. Enter any other parameters of the requisite such as a course, a range of courses, a student attribute (such as program or plan), and so on, in the Requisite Detail page.
4. Determine if any course validation parameters exist for the requisite courses on the Requisite Detail Parameters page.

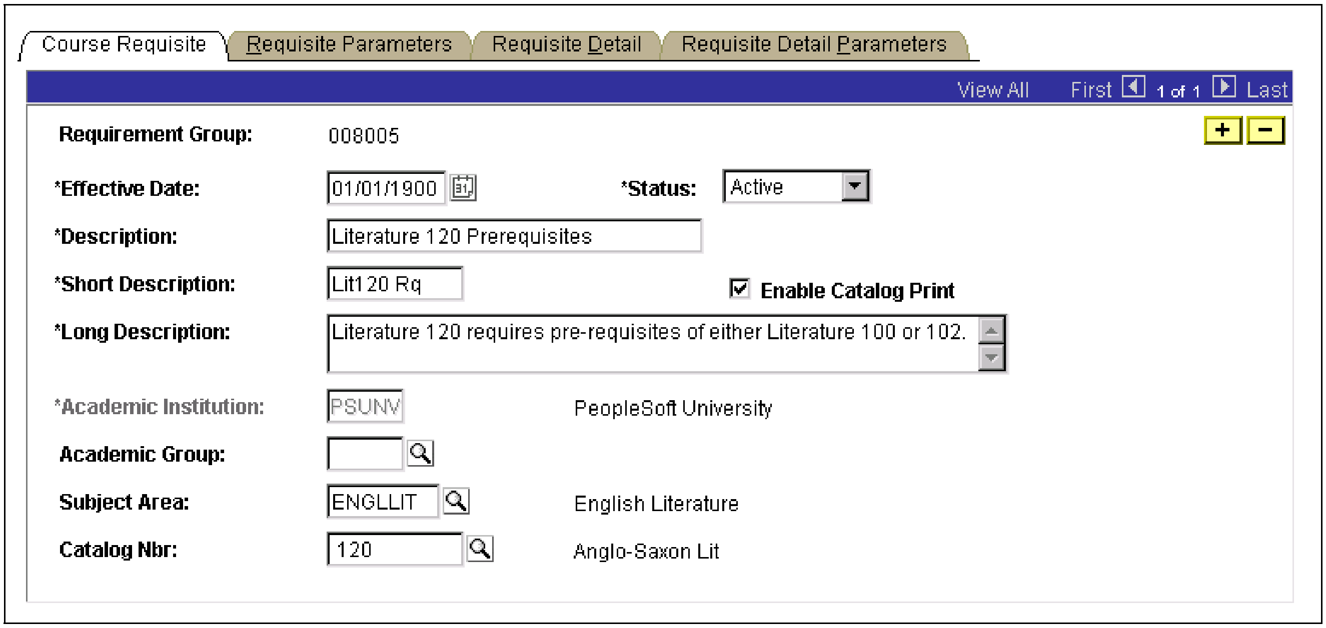
5. Attach the Enrollment Requirement Group to a course offering on the Course Catalog - Offerings page (as a requisite); or, attach the Enrollment Requirement Group to a course on the Schedule of Classes - Reserve Cap page (as a reserve capacity).

Pages Used to Create Enrollment Requirement Groups

Page Name	Object Name	Navigation	Usage
Course Requisite	CRSE_REQUIS_RESTR	Manage Student Records, Establish Courses, Setup, Enrollment Requirement Groups, Course Requisite	Describe the Enrollment Requirement Group. The system generates a unique numeric identifier for the group, although you can enter your own number for the group.
Requisite Parameters	CRSE_RQS_RSTR_PARM	Manage Student Records, Establish Courses, Setup, Enrollment Requirement Groups, Requisite Parameters	Specify overall GPA and unit requirements for all of the Requisite Detail lines in the group. The GPA, course and unit minimums entered apply to the overall course restrictions for the classes specified in the subsequent requirement pages.
Requisite Detail	CRSE_RQS_RSTR_DET	Manage Student Records, Establish Courses, Setup, Enrollment Requirement Groups, Requisite Detail	Link the actual courses or non-course requirements to the Enrollment Requirement Group. The page is very similar to the Academic Requirement Group - Detail page in Academic Advisement.
Requisite Detail Parameters	CRSE_RQS_DET_PRM	Manage Student Records, Establish Courses, Setup, Enrollment Requirement Groups, Requisite Detail Parameters	To further define the details of Course or Wild Card Course group line types.

Defining Enrollment Requirement Groups

Access the Course Requisite page.



Course Requisite page

Effective Date

Enter an effective date for this enrollment requirement group. The effective date must be equal to or less than the effective date of the course to which this course requisite is attached.

Note. The system accesses the enrollment requirement group rules based on the start date of the term for which the requisite checking occurs. As long as your effective date is less than or equal to the term start date and the Status is *Active,* the enrollment posting process checks this rule.

Status

Select a status for this enrollment requirement group. Select *Active* when adding a new enrollment requirement group. The *Inactive* option should only be used if your institution will no longer be using this enrollment requirement group.

Note. If you want to inactivate an enrollment requirement group, you need to delete that enrollment requirement group number from each course to which it is attached in the Catalog Data page.

Description, Short Description, and **Long Description**

Enter a description, short description, and long description for the enrollment requirement group.

Enable Catalog Print

Select this check box to display the long description of the enrollment requirement group in the course catalog.

Academic Institution

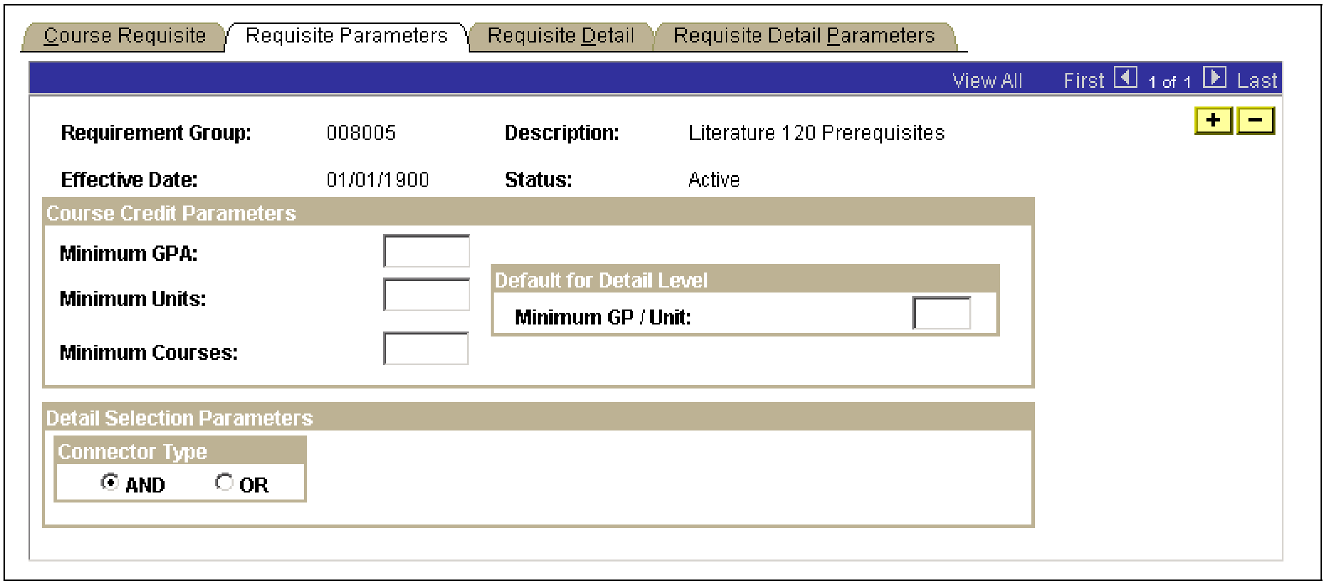
The system populates the academic institution field by default. You can change the value.

Academic Group, Subject Area, and **Catalog Number**

The system does not include these values in the analysis of the requirement group. These values are simply helpful tools for when you search the database for the appropriate requirement group to attach to a course. You may want to use these fields to signify the course to which the requisite is attached, or to specify department ownership of the requisite.

Defining Overall Requisite Parameters

Access the Requisite Parameters page.



Requisite Parameters page

Course Credit Parameters Course credit parameters are overall criteria that the system uses in the evaluation of all combined requisite detail lines.

Minimum GPA (minimum grade point average) Enter the overall minimum GPA for classes selected to meet this requirement.

Minimum Units Enter the total minimum units for the classes selected to meet this requirement.

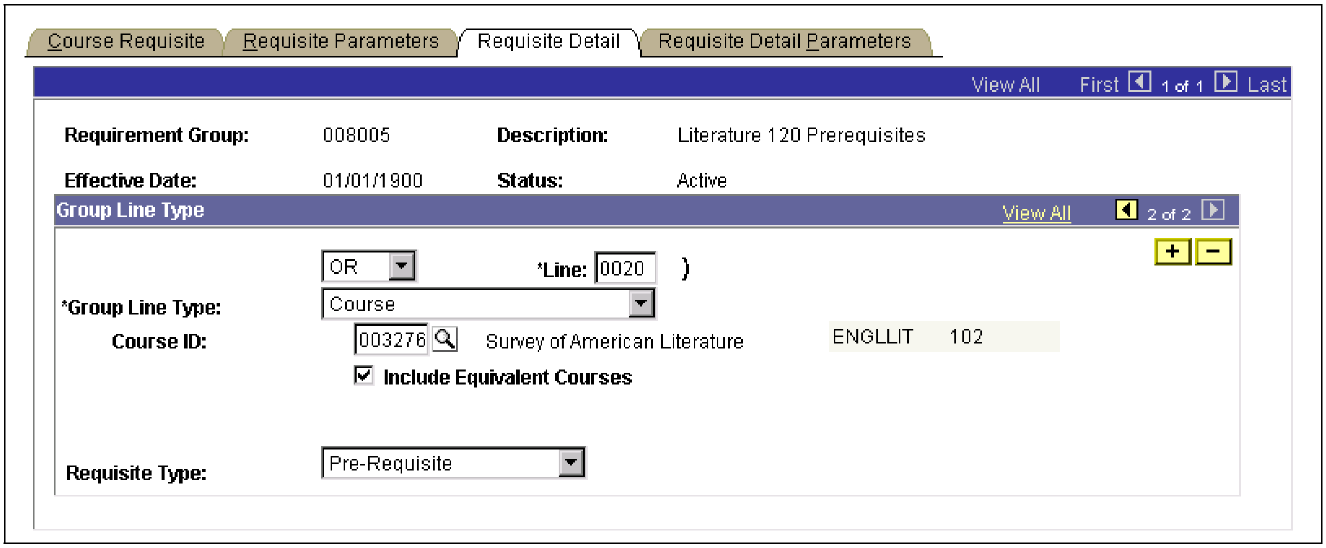
Minimum Courses Enter the total minimum courses for the requirement.

Minimum GP/Unit The system uses the minimum grade points per unit value as a filter in the requisite checking process. This technique is used to simplify and generalize the comparison logic. The minimum GP/Unit value is the minimum grade points required for any individual class selected to meet the requirement. The system includes a student's in-progress work as counting toward the minimum.

Connector Type For enrollment requirement groups with more than one Requisite Detail line, select the appropriate connector type. The Connector Type indicates if the student must meet *all* of the requirement line detail conditions (*AND*) or if the student only needs to meet one of the requirement line details (*OR*). This value is used as the connector default on the Requisite Detail page when rows are inserted.

Defining Requisite Details

Access the Requisite Detail page.



Requisite Detail page

Refresh Parentheses This button is available only when you have more than one detail line. Click this button to refresh the parentheses setting. You can not explicitly set parentheses to group detail rows.

If the main connector type is *AND,* then the system automatically groups *ORs* together with parentheses. For example, if A or B and C or D is entered, then the implied statement is: (A or B) and (C or D).

If the main Connector Type is *OR,* then the system automatically groups *ANDs* together with parentheses. For example, if A or B and C or D is entered, then the implied statement is: A or (B and C) or D.

Line The system generates the line number. The number determines the order in which the system evaluates the detail lines. You can change the number, but no two lines can have the same number.

Group Line Type Select the requirement line type. The group line type you select determines the format for this line. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

There are four types of group lines that you can select. Depending on the group line type you select, certain fields appear, and others hide.

Group Line Type	Fields That Display	Fields That Hide
Condition	Condition Code	Course ID
	Condition Operator	Include Equivalent Courses
	Condition Data	Term

Group Line Type	Fields That Display	Fields That Hide
		Associated Class
		Topic ID
		Requirement
		Academic Group
		Subject
		Catalog Nbr
Course	Course ID	Condition Code
	Include Equivalent Courses	Condition Operator
	Term	Condition Data
	Associated Class	Requirement
	Topic ID	Academic Group
		Subject
		Catalog Nbr
Requirement	Requirement	Course ID
		Include Equivalent Courses
		Term
		Associated Class
		Topic ID
		Condition Code

Group Line Type	Fields That Display	Fields That Hide
		Condition Operator
		Condition Data
		Academic Group
		Subject
		Catalog Nbr
Wild Card Course	Academic Group	Course ID
	Subject	Include Equivalent Courses
	Catalog Nbr	Term
		Associated Class
		Topic ID
		Condition Code
		Condition Operator
		Condition Data
		Requirement

Group Line Type page display

Condition

Condition line type. Specifies allowable values of data elements associated with a student. For example a condition of *Program equal to Undergraduate Liberal Arts.* Specify the condition you want to require in the *Condition Code, Condition Operator,* and *Condition Data* fields.

Course and **Include Equivalent Courses**

Course line type. Specific course a student must take to fulfill the requisite. Specify the Course ID, and if you want to allow equivalent courses to satisfy this requisite, select the Include Equivalent Courses check box in order for the system to include in its evaluation both the course ID you specify, and all courses that are set up as equivalent to the selected course ID for this requirement. If you select this check box, the following fields become unavailable: Term, Associated Class, and Topic ID. *Clear* this check box in order to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you may specify not only the course ID, but also the term in which the specific course must be taken to fulfill the requisite.

Term

Enter the term in which the student must take the course you specify in order for the course to be used in this enrollment requirement group. Leave this field blank to return all values.

Associated Class

Enter the associated class number (of the course you specify) that the student must take in order for the course to be used in this enrollment requirement group. For class associations, indicate a term to prompt off valid values. Leave this field blank to return all values.

Note. You can not enter *9999,* as this special associated class number can be associated with any other associated class number and is never an enrollment section.

See Chapter 17, "Managing the Schedule of Classes," Defining Class Associations, page 381.

Topic ID

Enter the topic ID (of the course you specify) that the student must take in order for the course to be used in this enrollment requirement group. This field prompts from the topics defined in the course catalog. Leave this field blank to return all values.

Requirement

Requirement line type. Specifies individual required elements. You are prompted for the requirement number. You can enter an enrollment requirement number or an academic requirement number. Enrollment requirements are used to fulfill your more complicated requirement rules and are created in the Enrollment Requirement component. Specify the Enrollment Requirement or Academic Requirement for this line in the Requirement field.

You can view examples of how to use an Academic Requirement (as opposed to an Enrollment Requirement).

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, "Setting Up Academic Requirements".

Wild Card Course

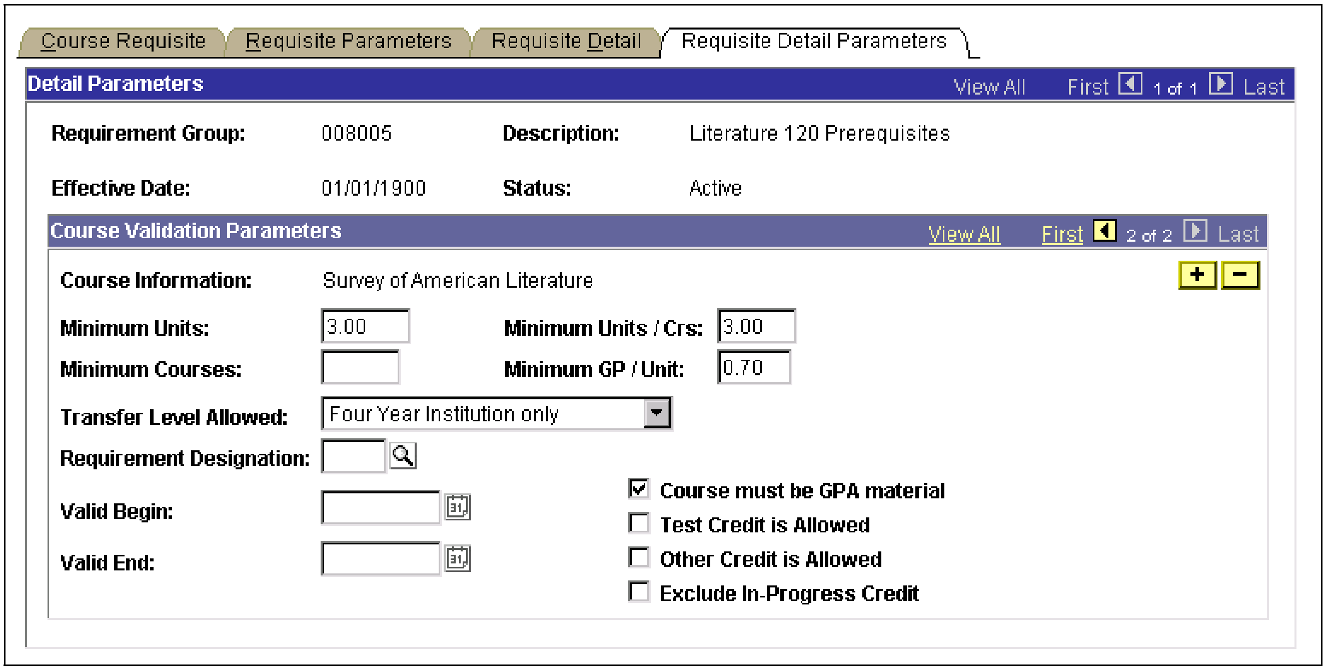
Wild card course line type. Specifies a range of courses based upon Subject Area and Catalog Number. For example, Wild Card Course of *English 1##,* where the range starts at any three digit English course beginning with 1. Specify as few or as many criteria that you want using the Academic Group, Subject and Catalog Nbr fields. Blank fields return all values.

Requisite Type

Specify whether this requirement line is a pre-requisite or a co-requisite. A pre-requisite is something that a student must complete before the start date of the desired class. If you use an Enrollment Course List (as part of an Enrollment Requirement), you can allow in-progress coursework to fulfill pre-requisites. A co-requisite is something that a student can complete prior to, or at the same time as the desired class. Conditions are always set up as pre-requisites in the background. The student either meets the condition at the time of enrollment (which means that they currently have the required condition), or they do not.

Defining Requisite Detail Parameters

Access the Requisite Detail Parameters page.



Requisite Detail Parameters page

This page is only necessary if you have a line type of course or wildcard course on the Requisite Detail page.

Minimum Units

Enter the minimum units required for the course, or the wild card course for this requisite detail line.

Minimum Units/Crs (minimum units per course)

Enter the minimum units per course value to indicate the minimum number of units that a single course must be worth in order to be evaluated. For example, if you set this to *3,* the system only picks up courses that are worth 3 units or greater. If the system finds a course on the student's record that matches the course on the Requisite Detail page, but it is only 2 units, the course will not be used to meet the requisite.

Minimum Courses

Enter the minimum number of courses required of the course or wild card course that you specify. For example, if you set this to 2, the system looks for at least 2 courses of the course or wild card course that you specify. Once the system finds at least two courses that match your requisite detail line, the requisite is satisfied.

Minimum GP/Unit

Enter the minimum grade points per unit that each course must possess in order to be used to satisfy the course requisite. For example, if you set this to .7, then each course must be a grade C or greater in order to be evaluated (.7 X 3 units = 2.1, or a grade of "C").

Transfer Level Allowed Enter a transfer level allowed value that indicates what type of transfer credit (if any) is acceptable. Your choices are:

Always Allow: Indicates that all applicable transfer credit can be used to satisfy the requisite.

Never Allow: Indicates that transfer credit can never satisfy the requisite.

Two Year Institution Only: Indicates that only transfer credit from two-year institutions can be used to satisfy the requirement.

On the School Data page, an institution can be identified as a two- or four-year institution.

See Chapter 7, "Setting Up Transfer Credit Processing," Defining External Organizations, page 158.

Requirement Designation Select the requirement designation that each course for this requisite detail line must possess to be evaluated. For example, if you specify a Wild Card course list of *ARCH 4##* on the Requisite Detail page, then specify a requirement designation of *DSGN* on the Requisite Detail Parameters page, only ARCH 400 - level courses that have a designation of *DSGN* (with a grade of "Satisfied") meet this requisite.

Requirement designation values are defined on the Requirement Designation Table page.

See Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 22.

Valid Begin and **Valid End** Enter valid begin and valid end dates to specify the date range of when the course(s) must be taken to satisfy the requisite. Leaving these fields blank means that it doesn't matter when the courses are taken. When the system compares the date range, it uses the start and end date of the term in which the course was taken. For transfer courses, the system uses the start date and end date of the articulation term.

Course must be GPA Material Select this check box to require that courses evaluated for this requisite must be applied toward the student's career GPA calculation. For instance, any courses that a student took for a pass/no pass grade basis would not be evaluated, as typically this grade basis does not have the "Include in GPA' check box selected on the Grading Scheme Table page.

Test Credit is Allowed Select this check box to allow test credit courses to be evaluated.

Other Credit is Allowed Select this check box to allow other credit courses to be evaluated.

Exclude In-Progress Credit If the course the student takes to satisfy this requisite must be fully graded for the system to consider it valid, select this check box. If left cleared, the system will include in analysis and "pass" all parameters any non-graded courses, as well as any graded courses that have the In-Progress flag turned on (such as Incomplete), and that match the course ID or wild card course on the Requisite Detail page. Leaving this check box cleared is the least restrictive, and allows for maximum user/student flexibility.

Examples of Enrollment Requirement Groups

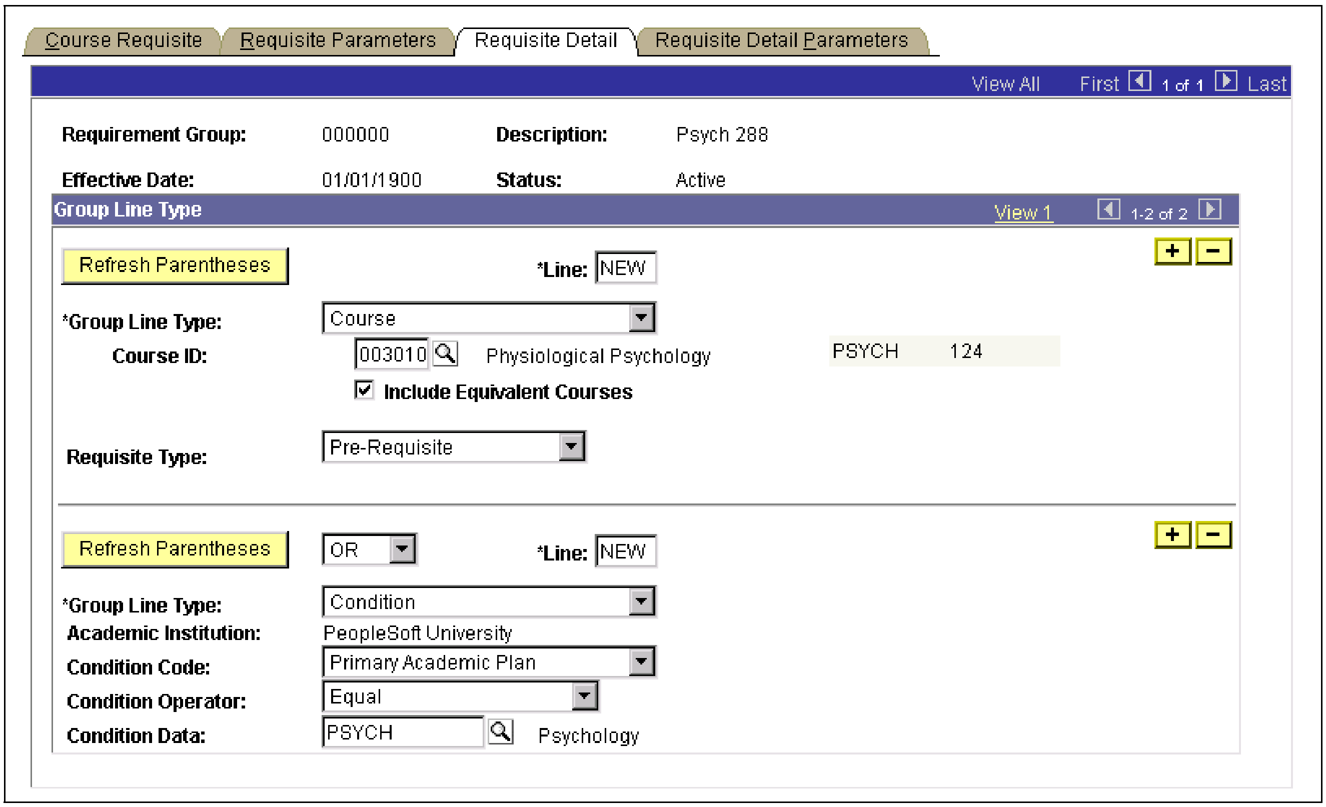
The enrollment requirement group feature is robust. While reviewing the Academic Advisement documentation will significantly enhance your knowledge of enrollment requirement groups, we review some examples in this section of how to set up the Requisite Detail page.

There are many ways to create course requirements, and usually there is more than one way to create any particular course requirement. Some of the complex examples use the enrollment requirement and course list features, documented later in this section.

Course or Condition Requisite

At PSUNV, Psychology 288, Neuropsychology, requires that students have either passed Psychology 124 *or* declared a Primary Academic Plan of Psychology. In this example, Psychology 124 is a course pre-requisite, and the Primary Academic Plan of Psychology is a condition pre-requisite. Notice that for the Condition, the requisite type field becomes unavailable for entry. This is because the system is populating the field to pre-requisite in the background.

The Requisite Detail page has two requisite lines, “OR’d” together:

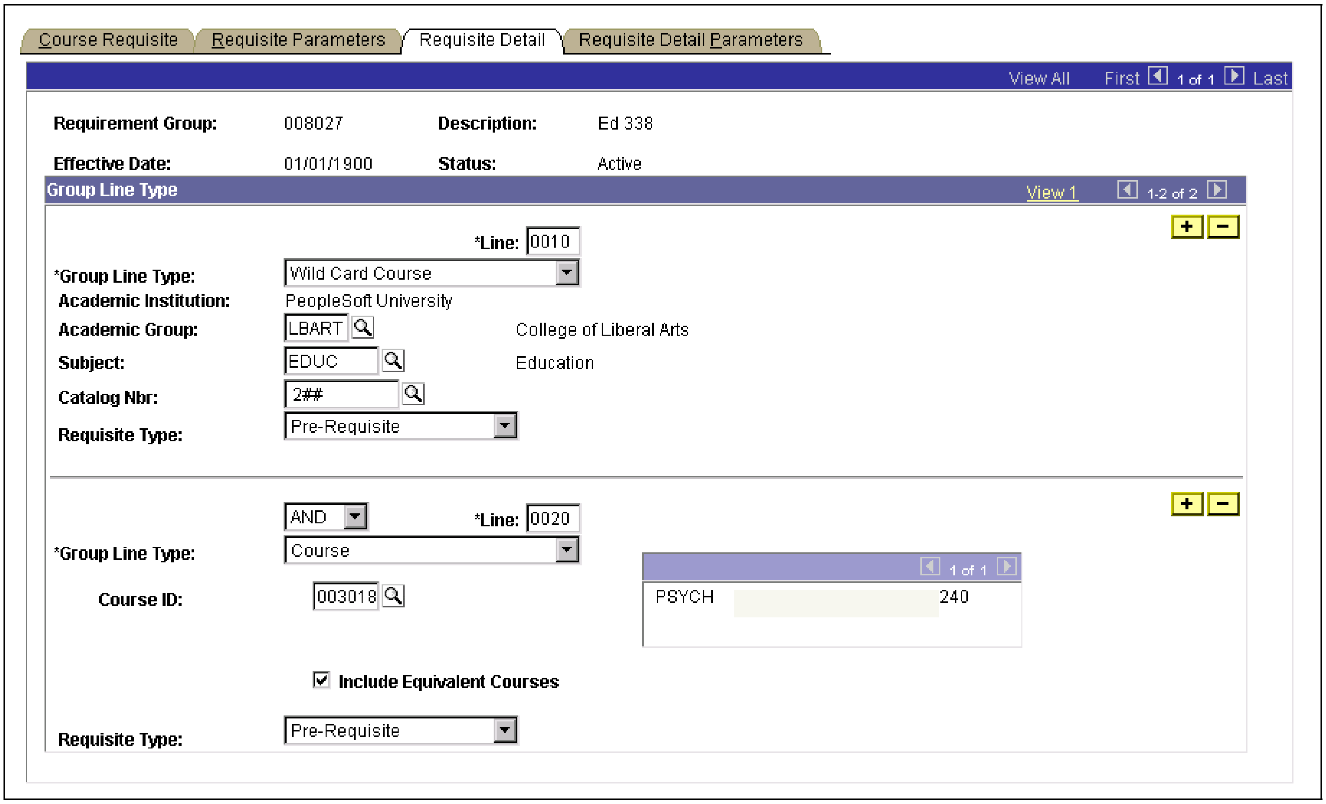


Setting up a Course or Condition Pre-requisite (CRSE_RQS_RSTR_DET)

Wild Card Course Requisite

At PSUNV, Education 338, Development of Reading Skills, requires a pre-requisite of any Education 200-level course, *and* Psychology 240. In this example, the Education 200 level course is specified as a *Wild Card Course* pre-requisite, and Psychology 240 is a regular *Course* pre-requisite.

The Requisite Detail page would have two requisite lines, unioned together with an “and” statement:



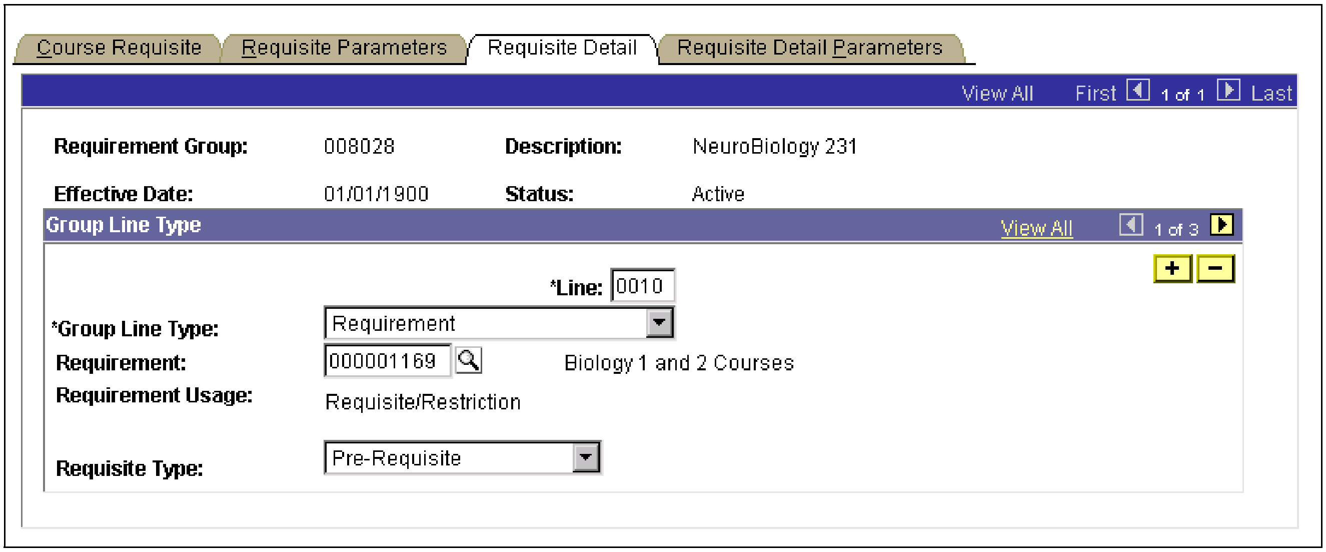
Setting up a Wild Card Course and Course Pre-Requisite (CRSE_RQS_RSTR_DET)

Requirement, Course, and Course List Requisite

At PSUNV, Biology 231, Neurobiology, requires Biology 1 and 2 (as virtually all Biology courses require), as well as Chemistry 101 and 102. Since the requisite of Biology 1 and 2 will be used repeatedly for virtually every Biology course, we developed an enrollment requirement called *Biology 1 and 2.* Within that enrollment requirement there is a course list of Biology 100 and 101. In our Biology 231 enrollment requisite group we define a Group Line Type of *Requirement* that points to the Biology 1 and 2 requirement, as well two Group Line Types of *Course* for Chemistry 101 and Chemistry 102.

Note. There are alternative ways of defining such a requisite scenario without using course lists, but this is one way that you can define these requisites.

After we define a Biology 1 and 2 course list and an enrollment requirement, we created the enrollment requirement group, entering the following detail lines on the Requisite Detail page. The page has three detail lines. One for the enrollment requirement of Biology 1 and 2, one for the course requirement of Chemistry 101, and the last for the course requirement of Chemistry 102:

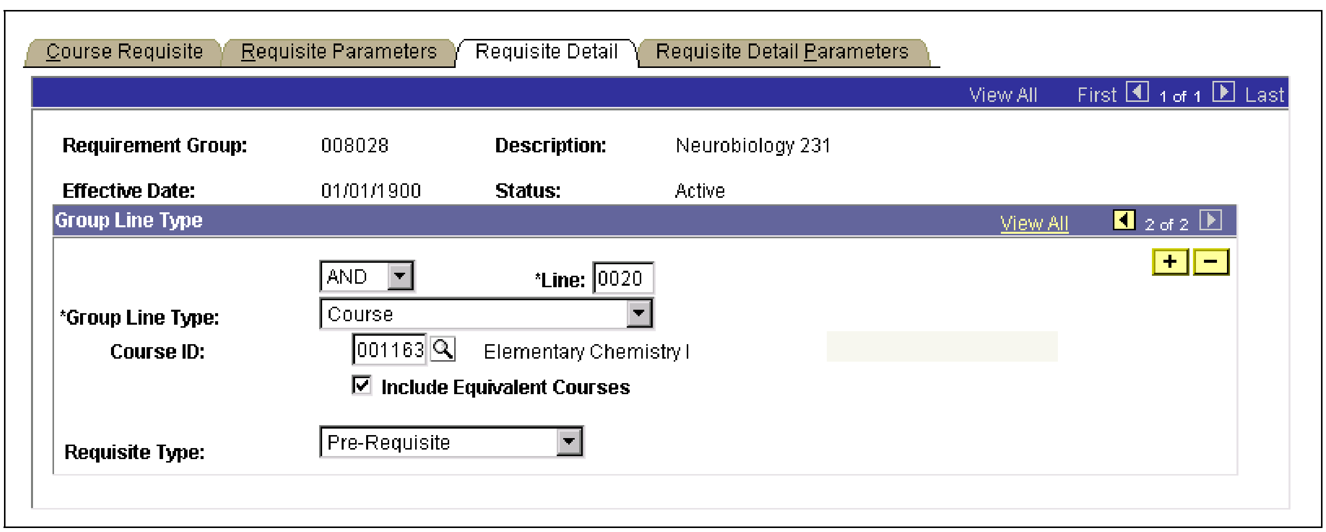


Using Requirement Line Types, Line 10 (CRSE_RQS_RSTR_DET)

In the preceding page:

- This requisite is considered first by the system since the Line number is *0010,* the lowest number in our detail lines.
- The Group Line Type is *Requirement.*
- The Requirement is the *Biology 1 and 2* (Biology 1 and Biology 2). These are in a course list since they will be used repeatedly together as a pre-requisite requirement in a large number of courses.
- The Requisite Type is *Pre-Requisite.*

The second and third detail lines appear as follows:



Using Course Line Types, Line 20 (CRSE_RQS_RSTR_DET)

In the preceding page:

- The connector type is *AND* since this rule must be fulfilled along with the Biology 1 and 2 requirement.
- The Line number is *0020.* The system evaluates this rule second, since there is one rule Line preceding it.
- The Group Line Type is *Course.*

- The Course ID represents *Chemistry 101.*

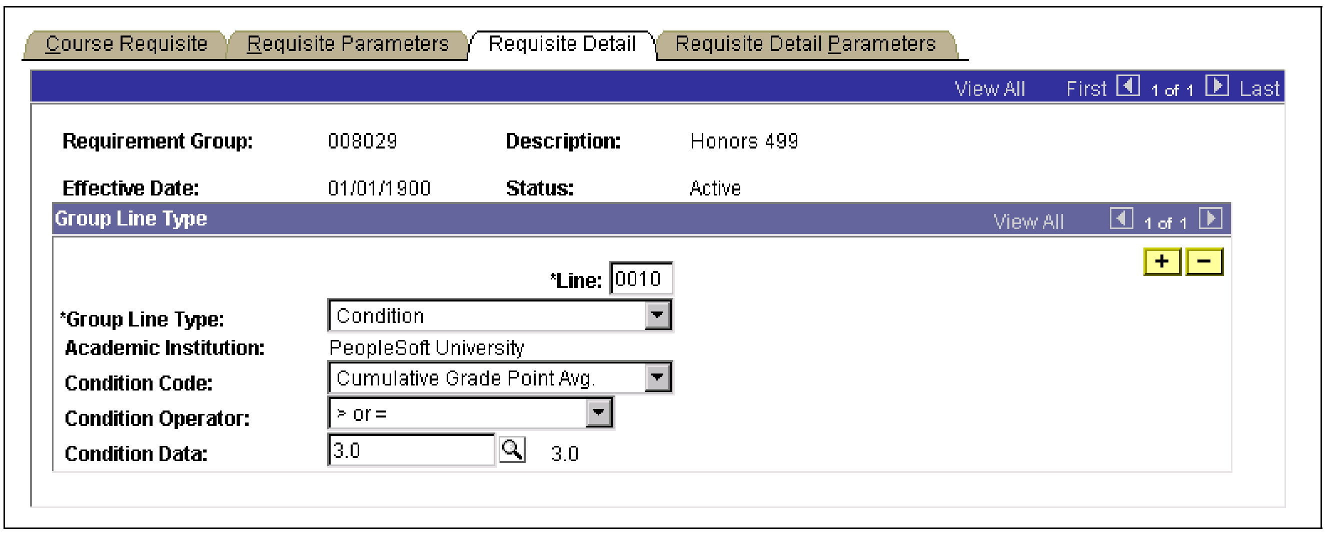
The third detail line for Chemistry 102 is exactly like the preceding page shot.

Condition and Wild Card Course Requisite, Exclude In-Progress Credit

At PSUNV, in order for a student to enroll in HONORS 499 he or she must have a verifiable Cumulative GPA of greater than or equal to 3.0.

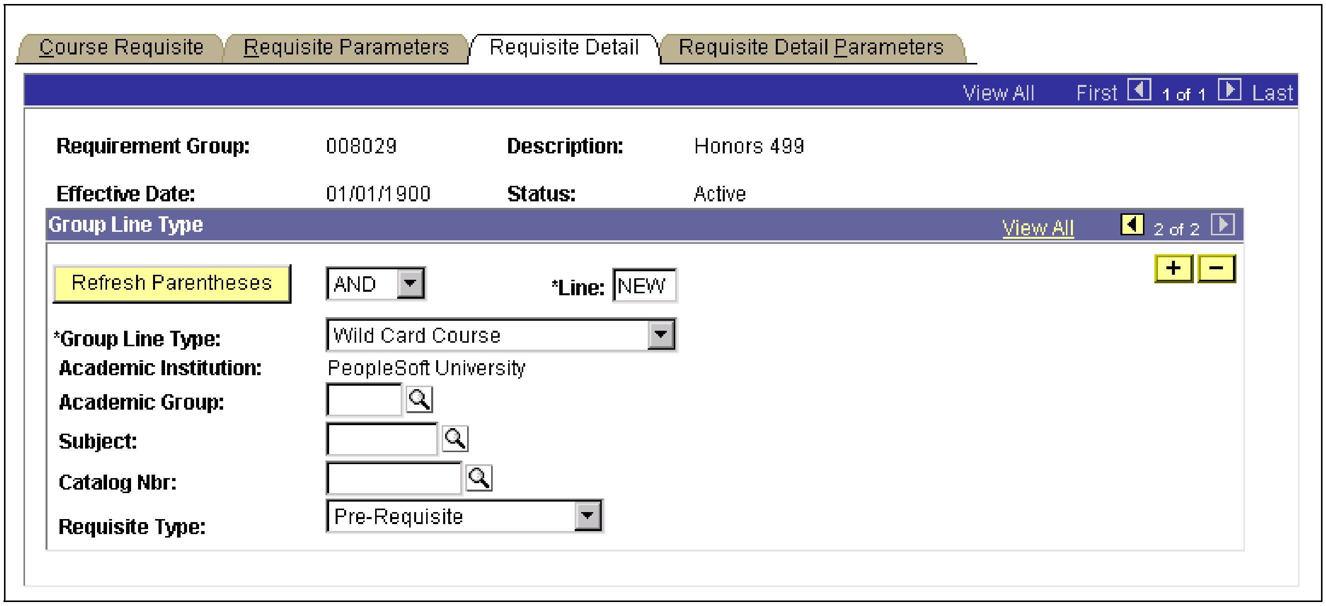
Here's how to create an enrollment requirement group for this course pre-requisite:

1. On the Course Requisite page, enter the necessary data.
2. On the Requisite Parameters page, enter *1* for the Minimum Course field.
3. On the Requisite Detail page, create two detail lines and attach as a requisite to HONORS 499.
4. For the first detail line, create a condition of Cumulative GPA greater than or equal to 3.0.



Creating a Condition for Cumulative GPA (CRSE_RQS_RSTR_DET)

For the second detail line set the Connector Type to *And,* then select a Group Line Type of *Wild Card Course.*



Creating a Detail Line for Wild Card Course (CRSE_RQS_RSTR_DET)

On the Wild Card Course Detail Requisite Detail page, select the Exclude In-Progress Credit box.

This requisite verifies that not only does the student have a Cumulative GPA of greater than or equal to 3.0, but that they are not a first semester student with no courses completed at all.

If you decide to include in-progress credit, then even those students who have no coursework completed, but at least 1 course in progress, will meet this requisite. This assumes that the student will not only complete their in-progress credit, but also complete their in-progress credit with the required GPA.

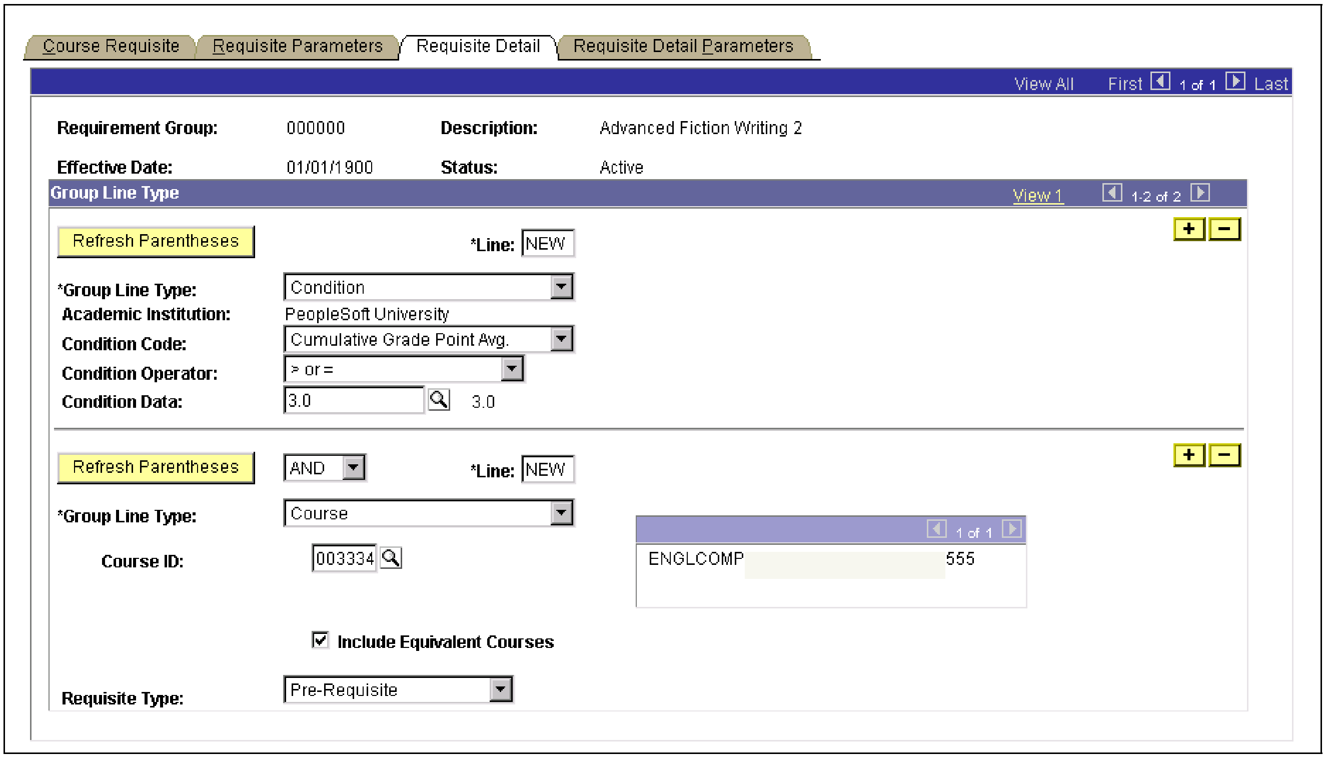
If you want to be more conservative with this requisite, and really ensure that the student has a proven track record, be sure to select the Exclude In-Progress check box on the Requisite Detail Parameters page.

Condition and Course Requisite, Exclude In-Progress Credit

At PSUNV, a total of five seats are reserved in Advanced Fiction Writing 2 for students who have a verifiable GPA of greater than or equal to 3.0 and have passed Advanced Fiction Writing 1 with a grade of A.

Here’s how to create an enrollment requirement group for this reserve capacity check:

1. On the Course Requisite page, enter the necessary data.
2. On the Requisite Parameters page, enter *1* for the Minimum Course field.
3. On the Requisite Detail page, create two detail lines and attach as a Reserve Capacity to Advanced Fiction Writing 2 on the Schedule of Classes - Reserve Cap page.
4. For the first detail line, create a condition of Cumulative GPA greater than or equal to 3.0.
5. For the second detail line set the Connector Type to *And,* select a Group Line Type of *Course,* select the Course ID for Advanced Fiction Writing 1, and select a Requisite Type of *Pre-Requisite.*



Creating a Condition & Course Prerequisite (CRSE_RQS_RSTR_DET)

1. On the Detail Parameters page, select the Exclude In-Progress Credit box, and enter a Min Gpt/Unit of 4.0.
2. This requisite line ensures that, if the system finds Advanced Fiction Writing 1 on the student's record, the student has completed the course and earned a grade of A.

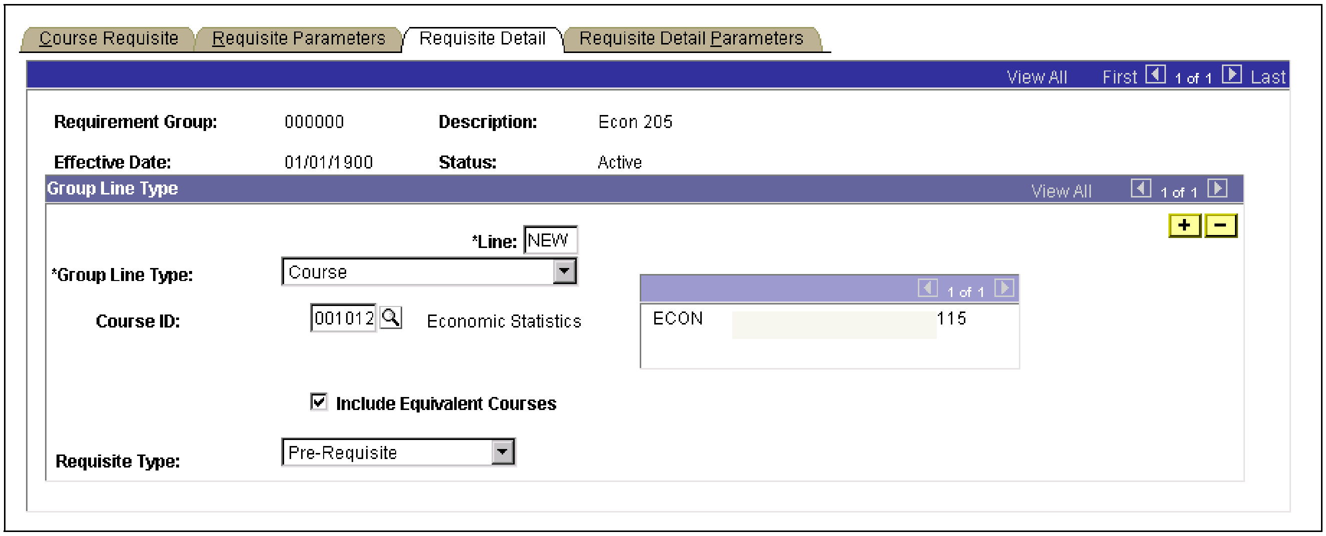
If you decide to include in-progress credit, then a student with Advanced Fiction Writing 1 in-progress (but not yet completed/graded) will meet the reserve capacity and the system will allow this student to enroll. Sometimes you may want to be this liberal, but in the instance here, we require that the course be verifiably an A grade.

Course Requisite, Include In-Progress Credit

At PSUNV, in order for a student to register for ECON 205, the student must either currently be enrolled in ECON 115, or have completed ECON 115 with a C grade or better.

Here's how to create an enrollment requirement group for this requisite:

1. On the Course Requisite page, enter the necessary data.
2. On the Requisite Parameters page, enter *1* for the Minimum Course field.
3. On the Requisite Detail page, create one detail line and attach as a requisite to ECON 205.
4. For this detail line select a Group Line Type of *Course,* select the Course ID for ECON 115, and select a Requisite Type of *Pre-Requisite.*
5. On the Requisite Detail Parameters page, enter Minimum GP/Unit of *2.00* and leave unchecked the Exclude In-Progress Credit box.



Creating a Course Pre-Requisite Detail Line (CRSE_RQS_RSTR_DET)

This requisite enables both students with ECON 115 in-progress and students with ECON 115 completed with a C grade or higher to fulfill the requisite.

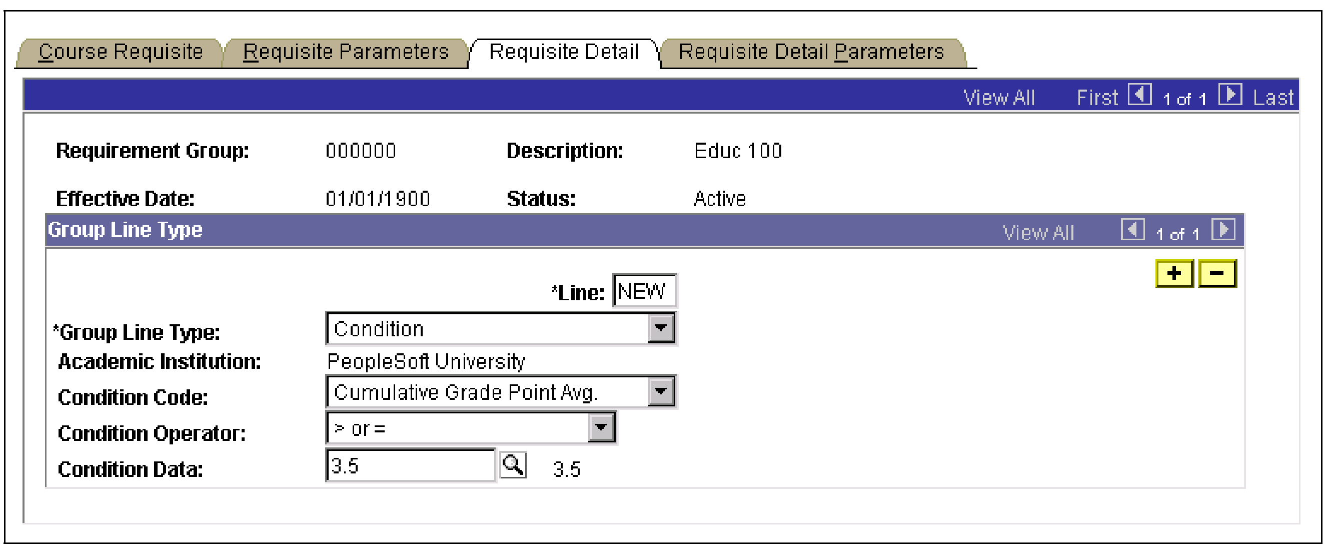
Condition Requisite, Include In-Progress Coursework

At PSUNV, all students with a Cumulative GPA of 3.5 and higher may register for EDUC 100 (first semester freshmen with no verifiable GPA at all are also eligible).

Here's how to create an Enrollment Requirement Group for this requisite:

1. On the Course Requisite page, enter the necessary data.
2. On the Requisite Parameters page, enter any necessary data.
3. On the Requisite Detail page, create one detail line and attach as a requisite to EDUC 100.

   For this detail line, create a condition of Cumulative GPA greater than or equal to 3.5.



Creating a Condition for Cumulative GPA (CRSE_RQS_RSTR_DET)

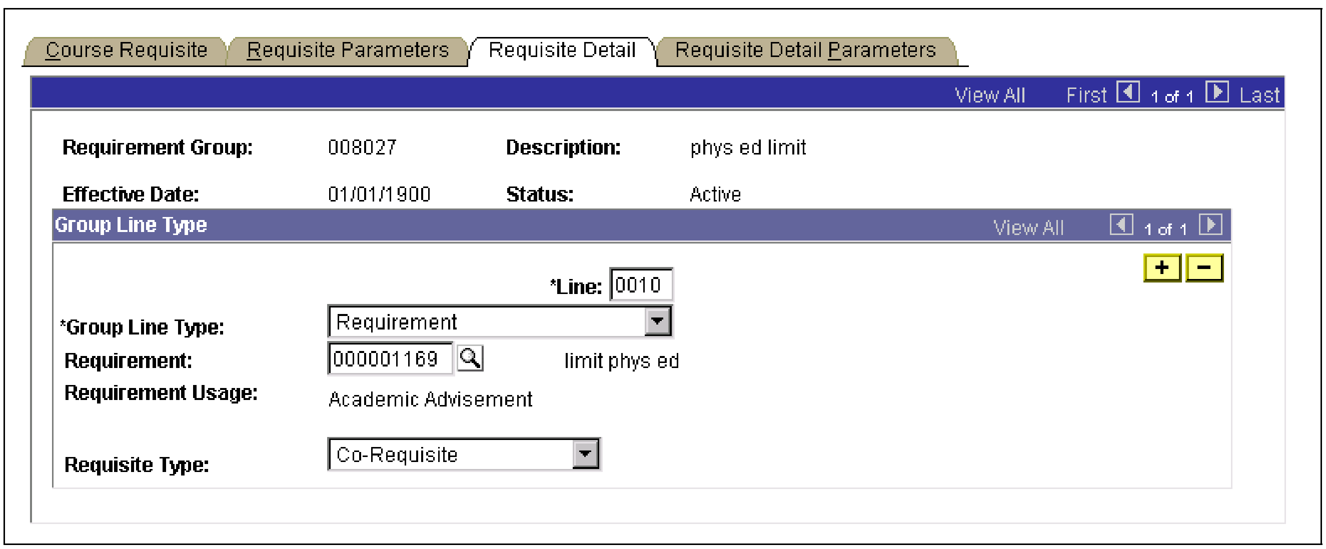
This requisite will be satisfied by students with some graded coursework (all of which average greater than 3.5 GPA), as well as by first semester freshmen with no coursework completed at all. This is because a null value passes all parameters.

Example of Maximum Unit Limit for Enrollment

At PSUNV, students can take no more than 12 units of physical education courses. If a student attempts to enroll in a physical education course that takes them over the 12-unit limit, their enrollment is blocked by a pre-requisite requirement.

Here's how to create this maximum unit enrollment requisite:

1. Create an Enrollment Course list that references all physical education courses (wild card or course by course). Set up any course parameters. Enter minimum gpts/unit value for each course if you want to only count physical education courses that were successfully completed. If you also want to limit "F" graded courses, you can leave this field clear.
2. Create an Academic Requirement that has a Line Item page line type of *Course Requirement.*
3. Set the Credit Include Mode field to *Verify,* and the Maximum Units Allowed field to *12.00.* Be sure this is set to *Verify.* This is the power that regular ENR usage enrollment requirements do not have.
4. Point to your Enrollment Course List on the Line Item Detail page.
5. Next, create an Enrollment Requirement Group that points to the academic requirement. Attach this requirement as a Co-requisite.



Requisite Detail page (CRSE_RQS_RSTR_DET)

Attach this enrollment requisite to all physical education courses.

Defining Enrollment Requirements

This section provides an overview of enrollment requirements and discusses how to:

- Define enrollment requirement descriptions.

- Define overall enrollment requirement parameters.
- Define enrollment requirement line types.
- Define line item parameters.
- Define line item course detail.

Understanding Enrollment Requirements

Enrollment requirements are for more complicated requisite needs, and are also great tools for re-usability. Create enrollment requirements only if you are using the *Requirement* Group Line Type in an enrollment requirement group. Enrollment requirements can be used in conjunction with other enrollment requirement group line types.

To fully understand enrollment requirements, we recommend that you read “Establishing Academic Requirements” in the *PeopleSoft Academic Advisement PeopleBook.*The pages in PeopleSoft Academic Advisement are virtually the same as those in PeopleSoft Student Records, but they are slightly more robust. You can set up enrollment requirement groups that reference academic requirements (in the event that you need to take advantage of their complex functionality), so we suggest that you learn as much about them as possible.

Here’s how to define an enrollment requirement:

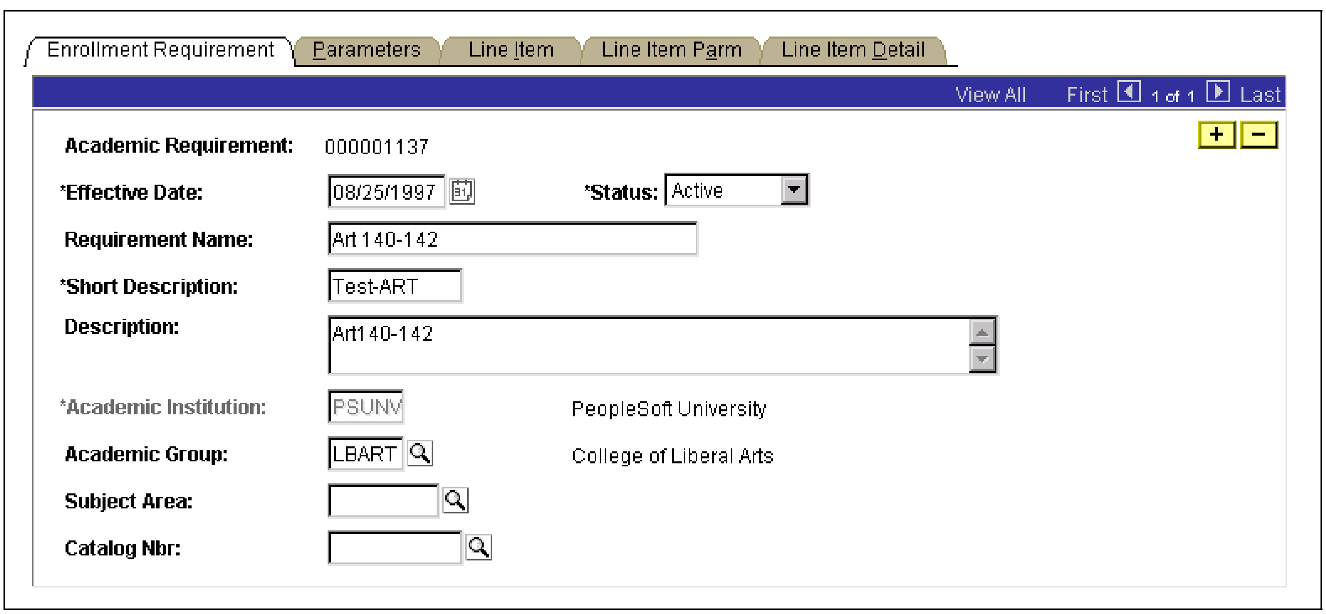
1. Evaluate your need to use the Group Line Type of *Requirement* on the Requisite Detail page.
2. Enter a description of the enrollment requirement on the Enrollment Requirement page.
3. Determine whether GPA, units, or courses are part of the requirement on the Parameters page.
4. Select a requirement line type and enter a description on the Line Item page.
5. Enter course credit parameters on the Line Item Parameters page.
6. If you’re using a course list, create it in the course list component, and add the course list number on the Line Item Detail page.

Pages Used to Create Enrollment Requirements

Page Name	Object Name	Navigation	Usage
Enrollment Requirement	CRSE_REQUIREMENT	Manage Student Records, Establish Courses, Setup, Enrollment Requirements, Enrollment Requirement	Describe the enrollment requirement.
Parameters	CRSE_RQRMNT_PARM	Manage Student Records, Establish Courses, Setup, Enrollment Requirements, Parameters	Enter overall GPA and unit requirements for the requirement.
Line Item	CRSE_RQRMNT_LINE	Manage Student Records, Establish Courses, Setup, Enrollment Requirements, Line Item	Use the Line Item page to define the requirement line type.
Line Item Parm (line item parameters)	CRSE_RQ_LINE_PARM	Manage Student Records, Establish Courses, Setup, Enrollment Requirements, Line Item Parm	Specify the unit and GPA requirements for the Line Type. The fields that display on the page are dependent upon the Line Type that you select on the Line Item page.
Line Item Detail	CRSE_RQ_LN_DETAIL	Manage Student Records, Establish Courses, Setup, Enrollment Requirements, Line Item Detail	Link course lists, derived course lists, and conditions to your line items. The page controls that display on the page are dependent upon the line type that you select on the Line Item page.

Defining Enrollment Requirements

Access the Enrollment Requirement page.



Enrollment Requirement page

Effective Date — Enter an effective date for this enrollment requirement. The effective date must be equal to or less than the effective date of the enrollment requirement group to which this course requisite is attached.

Note. The system accesses the enrollment requirement rules based on the start date of the term for which the requisite/restriction checking occurs. As long as your effective date is less than or equal to the term start date, and the *Status* of the enrollment requirement is *Active,* the system checks the rule in the enrollment process.

Status — Select a status for this requirement. Select *Active* when adding a new requirement. The *Inactive* option should only be used if your institution will no longer use this requirement.

Note. If you want to inactivate a requirement you'll also need to remove any reference to the requirement number on the Requisite Detail page.

To find out which enrollment requirement groups reference a particular requirement, run the reverse engineering report.

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, "Maintaining Academic Advisement Setup Data," Producing a Reverse Engineering Report.

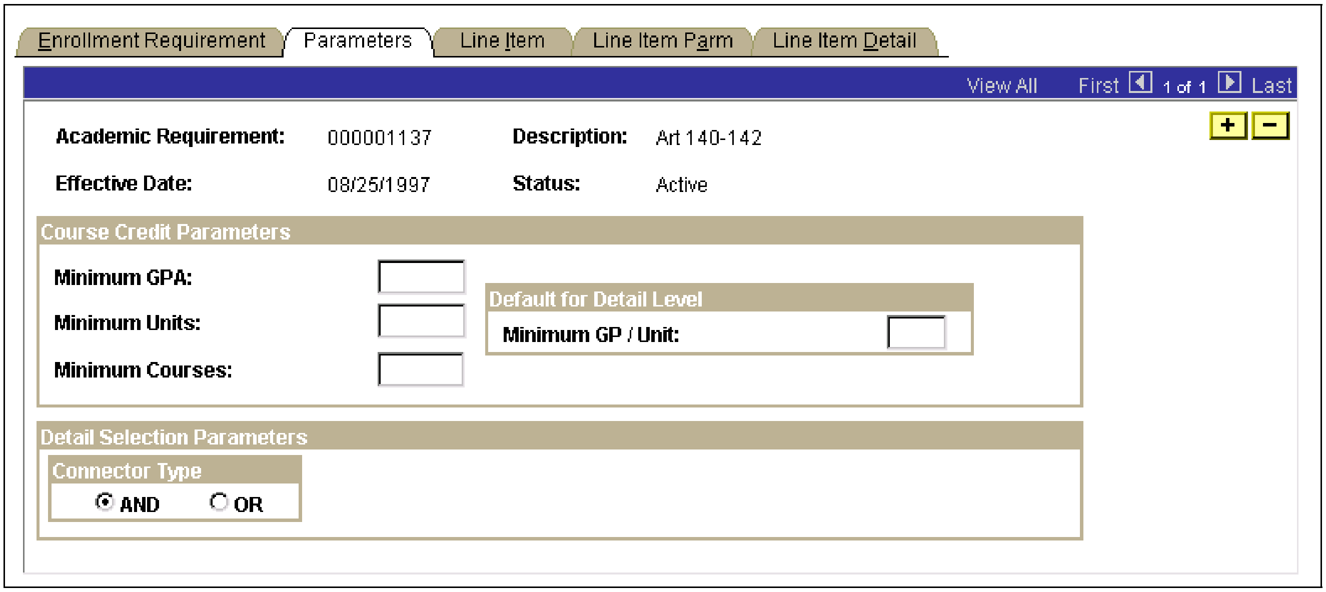
Requirement Name, Short Description, and **Description** — Enter a requirement name, short description, and description.

Academic Institution — The system populates the academic institution by default when you enter the page. You can change this value. The institution determines the enrollment requirement groups that can reference this requirement.

Academic Group, Subject, and **Catalog Nbr** (catalog number) — Academic group, subject, and catalog number are not used by the system in the analysis of the requirement, but are simply helpful tools for when you are searching the database for the appropriate requirement to attach to an enrollment requirement group. You may want to use these fields to signify the course to which the requisite will be attached, or to specify department "ownership" of the requisite. These values are optional.

Defining Overall Enrollment Requirement Parameters

Access the Parameters page.



Parameters page

Course Credit Parameters
Course credit parameters are overall requirements for all line items. These fields are optional.

Minimum GPA (minimum grade point average)
Enter the overall minimum GPA that all classes selected to meet this requirement must satisfy.

Minimum Units
Enter the total minimum units that all classes selected to meet this requirement must satisfy.

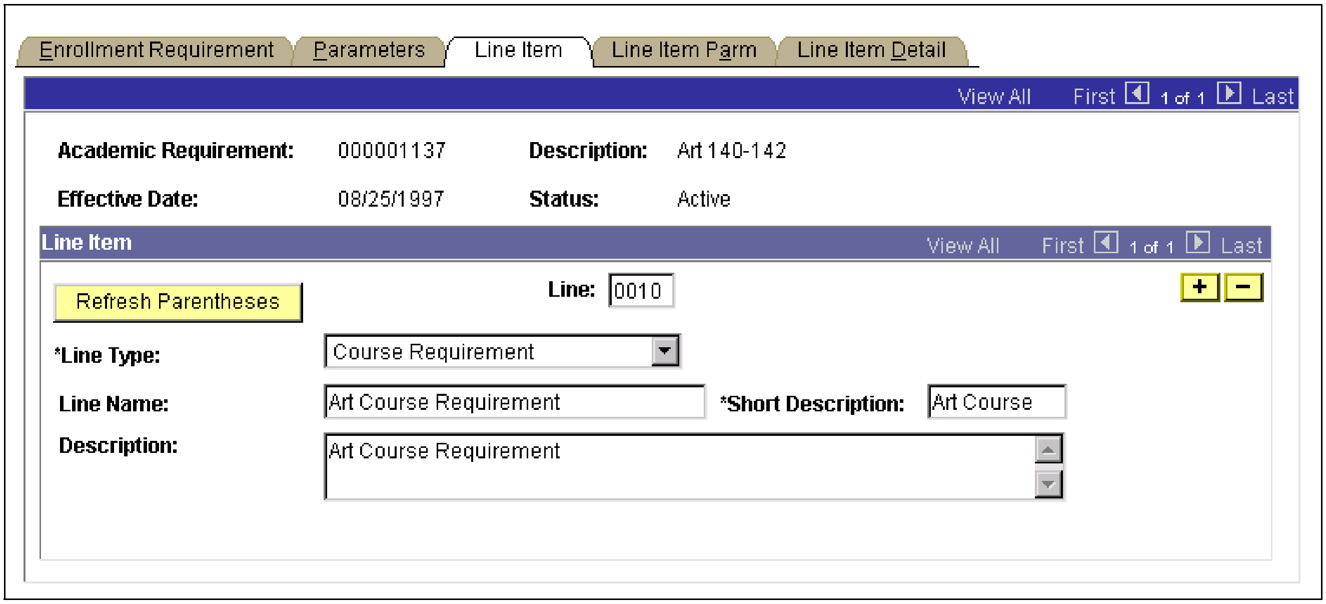
Minimum Courses
Enter the total minimum courses that all classes selected to meet this requirement must satisfy.

Minimum GP/Unit (minimum grade points per unit)
The system uses the value that you enter as a filter in the evaluation process. This technique is used to simplify and generalize the comparison logic. The minimum grade points per unit are the minimum grade points allowed for any individual class enrollment that is selected to meet the requirement.

Connector Type
Select the appropriate connector type. The connector type indicates if the student must meet *ALL* of the requirement detail conditions (*AND*) or if the student only needs to meet one condition (*OR*). This page control is used as the connector default on the Requirement Line Item page when you insert rows.

Defining Enrollment Requirement Line Types

Access the Line Item page.



Line Item page

Line The number determines the order in which the system evaluates the detail lines. The system generates a sequential line number. You can override the number, but it is best to simply insert the rows in the correct order.

Line Type The line type you select determines the format for this line, and it also determines the fields that become available for entry on the Line Item Detail page and Line Item Parm page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

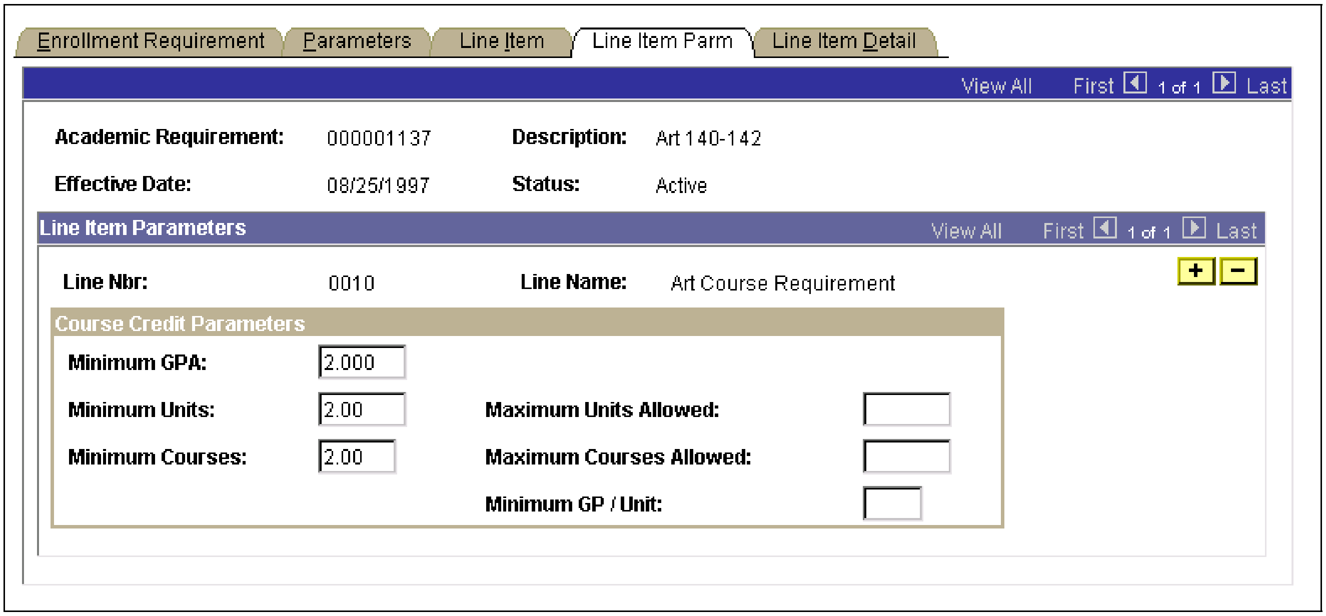
Each line type value is defined in the *PeopleSoft Academic Advisement PeopleBook.*

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, “Setting Up Academic Requirements,” Creating a Requirement Line Item.

Line Name, Short Description, and **Description** Enter a line name, short description, and description.

Defining Line Item Parameters

Access the Line Item Parm page.



Line Item Parm page (when Line Type is Course Requirement)

Minimum GPA (minimum grade point average): Enter the minimum GPA that is the minimum overall GPA requirement for classes selected to satisfy this requirement. (For example, if a requisite states that the student needs to take four Math 100-level classes with an overall GPA of 3.00 for a total of 12 units, then 3.00 is entered in this field.) Any existing value in the Minimum GPA field on the Parameters page defaults to the Line Item Parm (line item parameters) page when you add a requirement line.

Minimum Units: Enter a minimum units value that represents the minimum total units for the courses selected to satisfy this requirement. If this line item references a course list, then the number of units represents the total number of units that all courses found on the student's record (that match the course list) must be worth.

Minimum Courses: Enter a minimum course value that represents the minimum number of courses required for this requirement. If this line item references a course list, then the number of courses represents the total number of courses that all courses found on the student's record (that match the course list) must be worth.

Maximum Units Allowed: Enter a maximum number of units value that represents the maximum number of units that can be evaluated for this requirement. This is not a way to verify whether a student has exceeded a unit limit. This is a way to limit what is evaluated.

Maximum Courses Allowed: Enter a maximum number of courses value that represents the maximum number of units that can be evaluated for this requirement. This is not a way to verify whether a student has exceeded a course count limit. This is a way to limit what is evaluated.

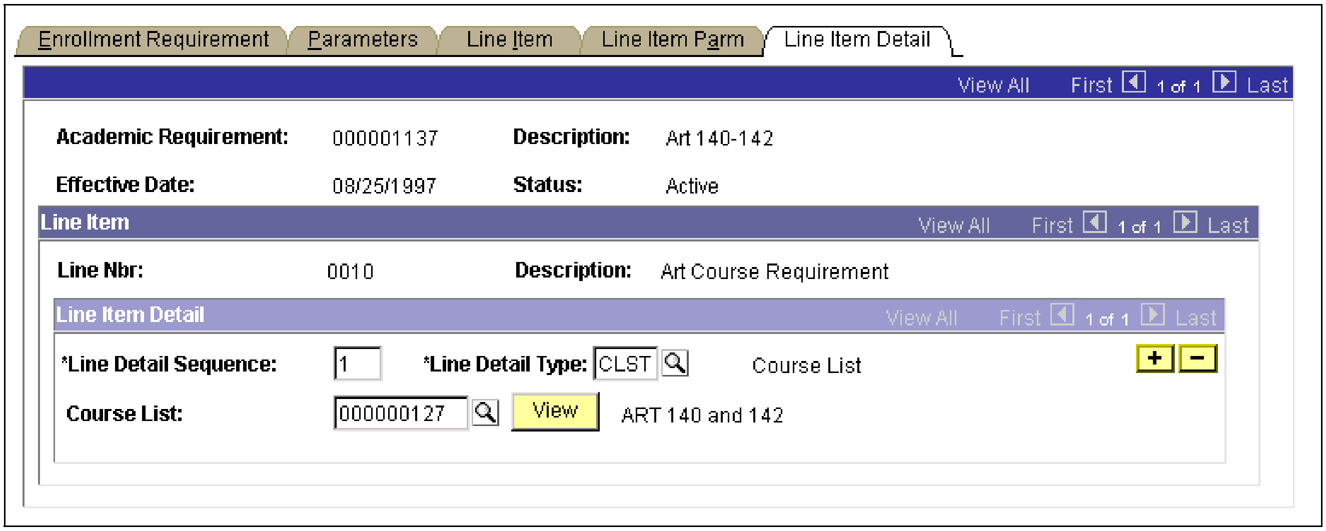
Minimum GP/Unit (minimum grade points per unit): Enter the minimum grade points per unit that each course must possess in order to satisfy the enrollment requirement. For example, if you set this to *2.0,* then each course that is evaluated must be a grade C or greater. If a course is evaluated that does not meet this minimum, the requisite is not satisfied.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Requirements," Specifying Requirement Line Item Parameters

Defining Line Item Course Detail

Access the Line Item Detail page.



Line Item Detail page (when Line Type is Course Requirement)

Line Detail Sequence A sequential number that is automatically assigned to a specific line detail. You can have multiple detail line sequences under a single line number. The line detail sequence affects the order in which the system evaluates each line item detail. Those with the lowest number are evaluated first.

Line Detail Type Select the line detail type value that indicates the type of line detail. Your choices are:

CLST: Indicates a static course list that can be used to satisfy the requirement.

DLST: Indicates a dynamic, user-defined course list that the system draws from a subset of a student's transcript or academic record.

Course List Appears with a line detail type of *CLST.* Enter the course list number that indicates a grouping of classes that the system can evaluate.

Derived Course List Appears with a line detail type of *DLST.* Enter the derived course list that indicates a type of class that the system can draw from a subset of the student's transcript or academic record.

List Include Mode Appears if you have multiple line item detail rows. Indicates how a previous line detail sequence interacts with a new Line detail sequence. (This field is available for every line except the first one.) Choices include *Y* (indicating union), *I* (indicating intersection), and *N* (indicating subtraction).

List Recall Mode Appears with a line detail type of *DLST.* Indicates the conditions that the system uses to select courses from the student's transcript.

View Appears with a line detail type of *CLST.* Click the View button to access the Course List summary where you can review the course list details.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Setting Up Academic Requirements,” Setting Up a Requirement Line Item Detail

Defining Enrollment Course Lists

This section provides an overview of enrollment course lists and discusses how to:

- Create course list descriptions.
- Link courses to the course list.
- Define details of courses in the course list.

Understanding Enrollment Course Lists

Create enrollment course lists only when you are creating enrollment requirements that possess a course list requirement. Enrollment course lists should be set up before enrollment requirements are established.

There are enrollment course lists and enrollment derived course lists. Enrollment course lists are static pre-defined lists of courses. Enrollment derived course lists are dynamically generated course lists as identified in a particular student’s transcript. You may attach both types of course lists to enrollment requirements and can specify how many courses from the list (static or dynamic) are needed to satisfy specific enrollment requirements. Course lists and derived course lists are also used in the Academic Advisement application as a precursor for academic requirements.

Here’s how to define an enrollment course list:

1. Create the enrollment course list description on the Course List Description page.
2. Specify courses for the enrollment course list on the Course List Detail page, including a range of wild card courses.
3. Enter the parameters of each course list on the Course List Parameters page.

See Also

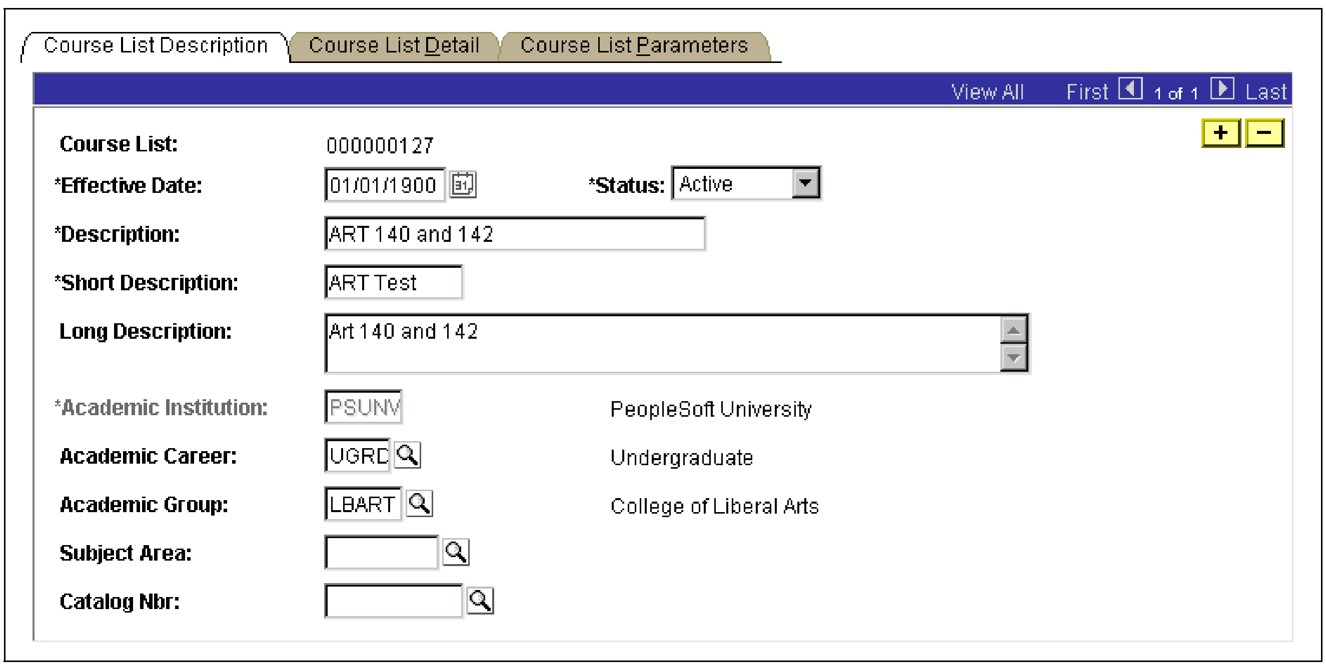
PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Setting Up Academic Course Lists”

Pages Used to Create Enrollment Course Lists

Page Name	Object Name	Navigation	Usage
Course List Description	RQ_COURSE_LIST_ENR	Manage Student Records, Establish Courses, Setup, Enrollment Course Lists, Course List Description	Describe the course list.
Course List Detail	RQ_CRSE_LIST_DET	• Manage Student Records, Define Academic Requirements, Setup, Academic Course Lists, Course List Detail • Manage Student Records, Establish Courses, Setup, Enrollment Course Lists, Course List Detail	Link the actual courses to the Course List. A course is specified either by a unique Course ID or by using the WildCard indicator.
Course List Parameters	RQ_CRSE_LST_DPR2	Manage Student Records, Establish Courses, Setup, Enrollment Course Lists, Course List Parameters	Define the details of units, GPA, and other information for each course in the course list.

Creating Course List Descriptions

Access the Course List Description page.



Course List Description page

Course List The system generates a unique course list number each time you add a new course list. We recommend that you use the system-generated course list number rather than entering your own course list number.

Effective Date

Enter an effective date for this course list. The effective date must be equal to or less than the effective date of the enrollment requirement to which this course list is attached.

Status

Select a status for this Course List. Select *Active* when adding a new course list. The *Inactive* option should only be used if your institution will no longer be using this course list. If you want to inactivate a course list, you will also need to remove all references to the course list on active Requirement Line Item Detail pages.

To identify which Requirement Line Item Detail pages reference a particular course list, run the Reverse Engineering Report.

Description, Short Description, and **Long Description**

Enter a description, short description, and long description of the course list.

Academic Institution

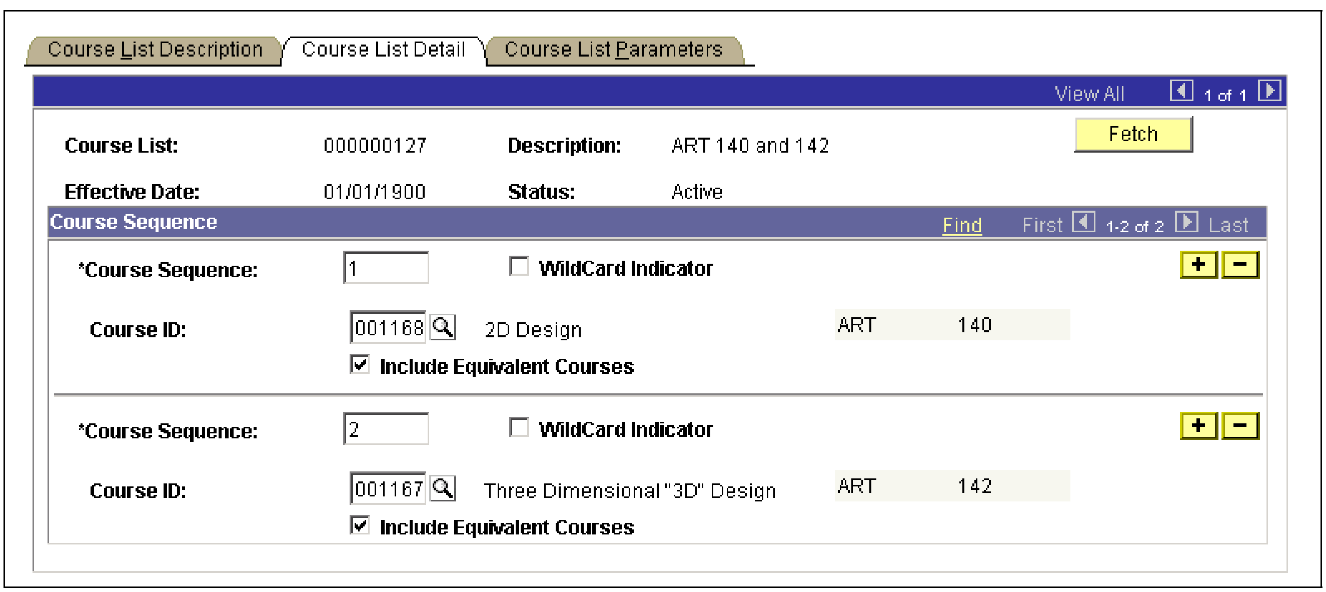
The system populates the academic institution by default. In Add mode, you can change this value.

Academic Career, Academic Group, Subject, and **Catalog Number**

Academic career, academic group, subject, and catalog number are not used by the system in the analysis of the course list, but are simply helpful tools for when you are searching the database for the appropriate course list to attach to an enrollment requirement. You may want to use these fields to signify the course to which the course list will be attached, or to specify department "ownership" of the course list.

Linking Courses to the Course List

Access the Course List Detail page.



Course List Detail page

Fetch

When you access this component, the system loads only effective-dated rows, without any detail. This is in order to enhance performance for those course lists that have hundreds of course sequence rows. Click the Fetch button in order to retrieve and display the course sequence data, including the related detail parameters for the effective-dated row.

Course Sequence This number acts as a course specification, indicating either a specific course ID or a group of equivalent courses. Each course sequence number indicates a unique component of the course list and can be arbitrarily assigned except when using a Line Type of Sequential Restriction on the Requirement Line Item page. If the sequence is important, enter the correct course order here so that the student must take the courses in the specified order.

WildCard Indicator Select this check box to indicate a wild card course, rather than a specific course ID.

Academic Group Appears if you select the WildCard Indicator check box. Specify an academic group for the course offering. All courses with this academic group may be considered.

Subject Appears if you select the WildCard Indicator check box. Specify an academic subject for the course offering. All courses with this subject may be considered.

Catalog Nbr (catalog number) Appears if you select the WildCard Indicator check box. Enter the required portion of the catalog number that is up to ten characters (NNNNAAAAAA) where the first four characters are numeric (leading zeroes are blank padded) and the last six characters a an alphanumeric suffix. For example, a catalog number of 3## indicates that any 300-level course is acceptable, including 301A, because suffixes are ignored when a number wild card is specified unless a suffix value is exclusively indicated.

Course ID If the WildCard Indicator check box is not selected, use this field to specify the exact course ID.

Include Equivalent Courses Select in order for the system to include in its evaluation both the course ID you specify, and all courses that are set up as equivalent to the selected course ID for this requisite. If you select this check box, the following fields become unavailable: Term, Associated Class, and Topic ID.

Clear this check box in order to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you may specify not only the course ID, but also the term in which the specific course must be taken.

Term Enter the term in which the student must take the course you specify in order for the course to be used in this enrollment course list. Leave this field blank to return all values.

Associated Class Enter the associated class number (of the course you specify) that the student must take in order for the course to be used in this enrollment course list. For class associations, indicate a term to prompt off valid values. Leave this field blank to return all values.

Note. You can not enter *9999,* as this special associated class number can be associated with any other associated class number and is never an enrollment section.

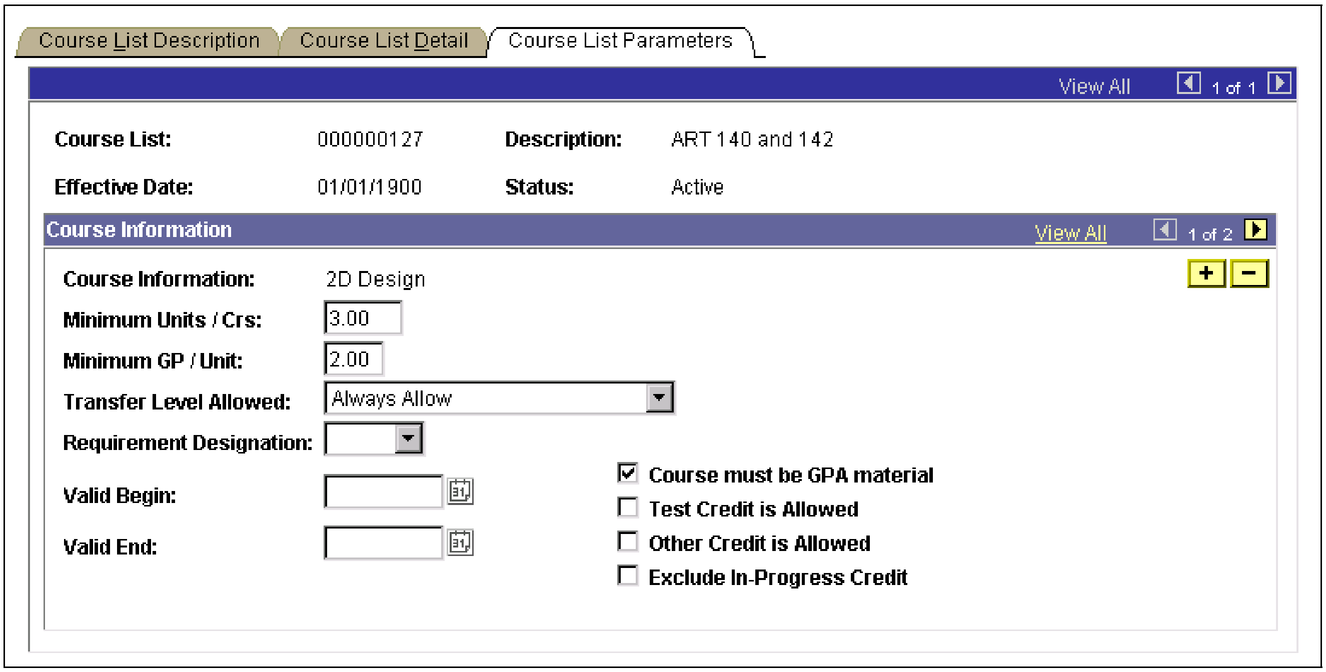
See Chapter 17, "Managing the Schedule of Classes," Defining Class Associations, page 381.

Topic ID

Enter the topic ID (of the course you specify) that the student must take in order for the course to be used in this enrollment course list. This field prompts from the topics defined in the course catalog. Leave this field blank to return all values.

Defining Details of Courses in the Course List

Access the Course List Parameters page.



Course List Parameters page

Minimum Units

Enter the minimum units required for each course or wild card course in the course list.

Minimum Units/Crs (minimum units per course)

Enter the minimum units per course value to indicate the minimum number of units that the course to which this line refers must be worth in order to be used in the course list or as a wildcard course. For example, if you set this to *3,* the system only uses courses for this line that are worth 3 units each or greater. If the system finds a course on the student's record that meets the course list, but it is only 2 units, the course can not be used to satisfy this requirement.

Minimum GP/Unit (minimum grade points per unit)

Enter the minimum grade points per unit that the corresponding course or wild card course must possess in order to be used in the analysis. For example, if you set this to *2.0,* then the course must be a grade C or greater in order to fulfill this requisite.

Transfer Level Allowed

Enter a transfer level allowed value that indicates what type of transfer credit (if any) is acceptable. Your choices are:

Always Allow: Indicates that all applicable transfer credit can be used to satisfy the requisite.

Never Allow: Indicates that transfer credit can never satisfy the requisite.

Two Year Institution Only: Indicates that only transfer credit from two-year institutions can be used to satisfy the requirement.

Four Year Institution Only: Indicates that only transfer credit from four-year institutions can be used to satisfy the requirement.

Requirement Designation

Select the requirement designation that the course or wild card course must possess. For example, if you specify a Wild Card course of *ARCH 4##* on the Course List Detail page, then specify a requirement designation of *DSGN* on the Course List Parameters page, only ARCH 400 - level courses that have a designation of *DSGN* (with a grade of "Satisfied") meet this requisite.

Requirement designation values are defined on the Requirement Designation Table page.

See Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Defining Requirement Designations, page 24.

Valid Begin and **Valid End**

Enter valid begin and valid end dates to specify the date range of when the course must be taken to satisfy the requisite. Leaving these fields blank means that it doesn't matter when the courses are taken. When the system compares the date range, it uses the start and end date of the term in which the course was taken. For transfer courses, the system uses the start and end date of the articulation term.

Course must be GPA Material (course must be grade point average material)

Select to require that the course taken for this requisite be applied toward the student's career grade point average calculation. For instance, any courses that a student took for a pass/no pass grade basis could not be used to meet this requisite if this grade basis does not have "Include in GPA" check box selected on the Grading Scheme table page.

Test Credit is Allowed

Select to allow test credit courses to be evaluated.

Other Credit is Allowed

Select to allow other credit courses to be evaluated.

Exclude In-Progress Credit

If the course taken to satisfy this course list must be fully graded for the system to consider it valid, select this check box. If left cleared, the system will include in analysis and "pass" all parameters any non-graded course, as well as any graded course that has the In-Progress flag turned on (such as Incomplete), and that match the course ID or wild card course on the Requisite Detail page. Leaving this check box cleared is the least restrictive, and allows for maximum user/student flexibility.

Viewing Enrollment Requisite Summary Information

This section discusses how to:

- Review summary rules for enrollment requirement groups.
- Review summary rules for enrollment requirements.
- Review summary rules for enrollment course lists.

See Also

Chapter 5, "Setting Up Enrollment Requisites," Defining Enrollment Requirement Groups, page 100

Chapter 5, "Setting Up Enrollment Requisites," Defining Enrollment Requirements, page 117

Chapter 5, "Setting Up Enrollment Requisites," Defining Enrollment Course Lists, page 125

Pages Used to View Requisite Summaries

Page Name	Object Name	Navigation	Usage
Requirement Group Summary	ADVIS_RQ_GRP_SUMM	Manage Student Records, Establish Courses, Inquire, Enrollment Requisite Summary, Requirement Group Summary	View Enrollment Requirement Group rules. This page is shared with the Academic Advisement application.
Requisite Group Description	RQS_SUMM_DESC	To access the Requirement Group Description page, click the requirement group link on the Requirement Group Summary page.	View a summary of Requisite Description information. This page is shared with the Academic Advisement application.
Requirement Summary	ADVIS_RQ_SUMMARY	• Manage Student Records, Define Academic Requirements, Inquire, Academic Requirement Summary, Requirement Summary • Manage Student Records, Establish Courses, Inquire, Enrollment Rqrmnt Summary, Requirement Summary	View Enrollment Requirement rules. This page is shared with the Academic Advisement application.
Requirement Description	RQ_SUMM_DESC	To access the Requirement Description page, click the requirement description link on the Requirement Summary page.	View a summary of enrollment requirement rules. This page is shared with the Academic Advisement application.
Requirement Line Description	RQ_LN_SUMM_DESC	To access the Requirement Line Description page, click the requirement line description link on the Requirement Summary page.	View a summary of enrollment requirement rules. This page is shared with the Academic Advisement application.
Course List Summary	RQ_COURSELIST_SUMM	• Manage Student Records, Define Academic Requirements, Inquire, Advisement CourseList Summary, Course List Summary • Manage Student Records, Establish Courses, Inquire, Enrollment CourseList Summary, Course List Summary	View the courses within an Enrollment Course List. This page is shared with the Academic Advisement application.
Course Description	CLST_SUMM_DESC	To access the Course Description page, click the course description link on the Course List Summary page.	View the Course ID and Description for each requisite course. This page is shared with the Academic Advisement application.

Processing the Enrollment Advisement Report

This section provides an overview of the enrollment advisement report and discusses how to run the report.

Understanding the Enrollment Advisement Report

The enrollment advisement report lists the contents (or structure) of a specific enrollment requirement group or all enrollment requirement groups that meet the criteria established for the report. This report is an easy way to verify the enrollment requirement groups for any institution, subject, or catalog number. For example, if you need a printout of all the enrollment requirement groups that are defined for courses at PSUNV with a subject of *BIOLOGY,* you can run this report.

Here's how to run the enrollment advisement report:

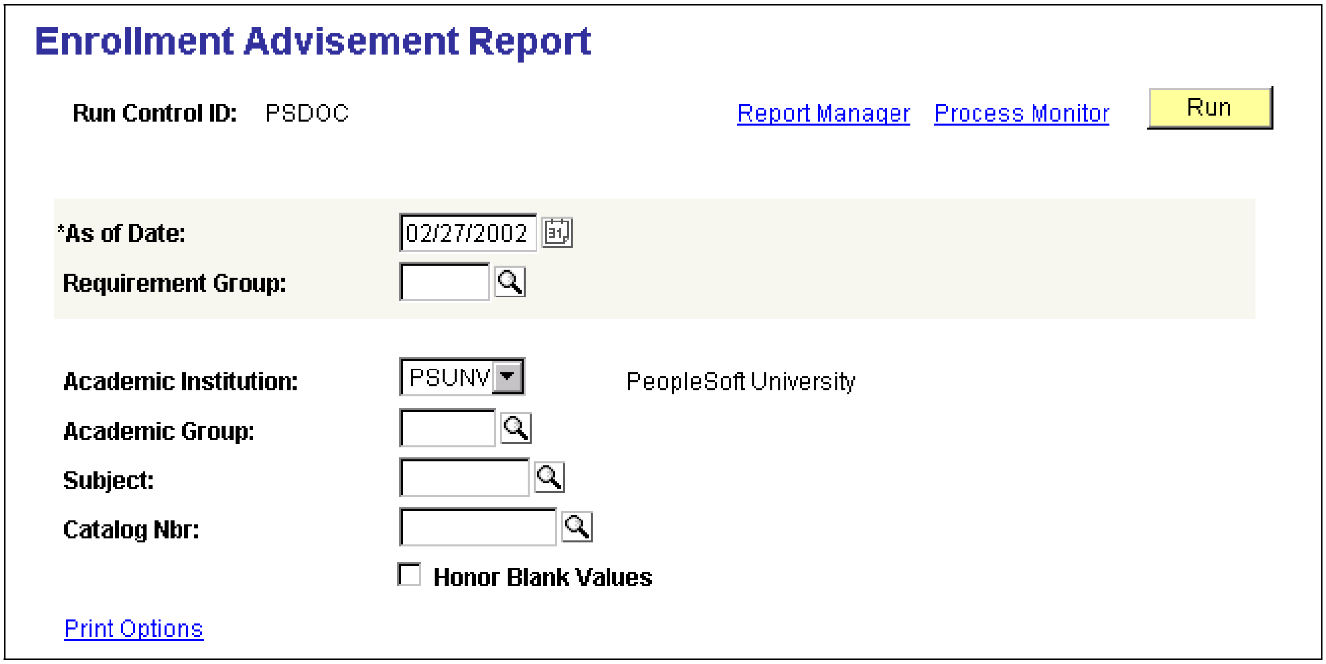
1. Enter your processing parameters for the enrollment advisement report.
2. Specify details about how much or little you want to print about each enrolment requirement group.

Pages Used to Run the Enrollment Advisement Report

Page Name	Object Name	Navigation	Usage
Enrollment Advisement Report	RUNCTL_SRENRADV	Manage Student Records, Establish Courses, Report, Enrollment Advisement	Enter your processing parameters for the enrollment advisement report.
Enrollment Advisement Report – Print Options	PRINT_OPTIONS_SEC3	Click the Print Options link on the Enrollment Advisement Report page.	Specify details about how much or little you want to print about each enrolment requirement group.

Entering Enrollment Advisement Run Control Parameters

Access the Enrollment Advisement Report page.



Enrollment Advisement Report page

As of Date

The report will accurately reflect the requirements contained in the specified requirement group (or requirement groups that meet the search criteria) as of this date. (This field value automatically populates to the current date, but it can be modified. A value in this field is mandatory.)

Requirement Group

The subject of this report. Each enrollment requirement group consists of detail lines pointing to conditions, courses, or requirements as well as parameters that include unit and course requirements.

Note. If you enter a requirement group number, then the remaining fields on the page become unavailable. If you do not enter a requirement group number, then the remaining fields are available for entry and you can use them to identify a set of enrollment requirement groups.

Academic Institution

The academic institution for which you want to report related enrollment requirement groups. Leave this field blank to return all values (wildcard).

Academic Group

The academic group for which you want to report related enrollment requirement groups. Leave this field blank to return all values (wildcard).

Subject

The academic subject for which you want to report related enrollment requirement groups. Leave this field blank to return all values (wildcard).

Catalog Number

The catalog number for which you want to report related enrollment requirement groups. Leave this field blank to return all values (wildcard).

Honor Blank Values

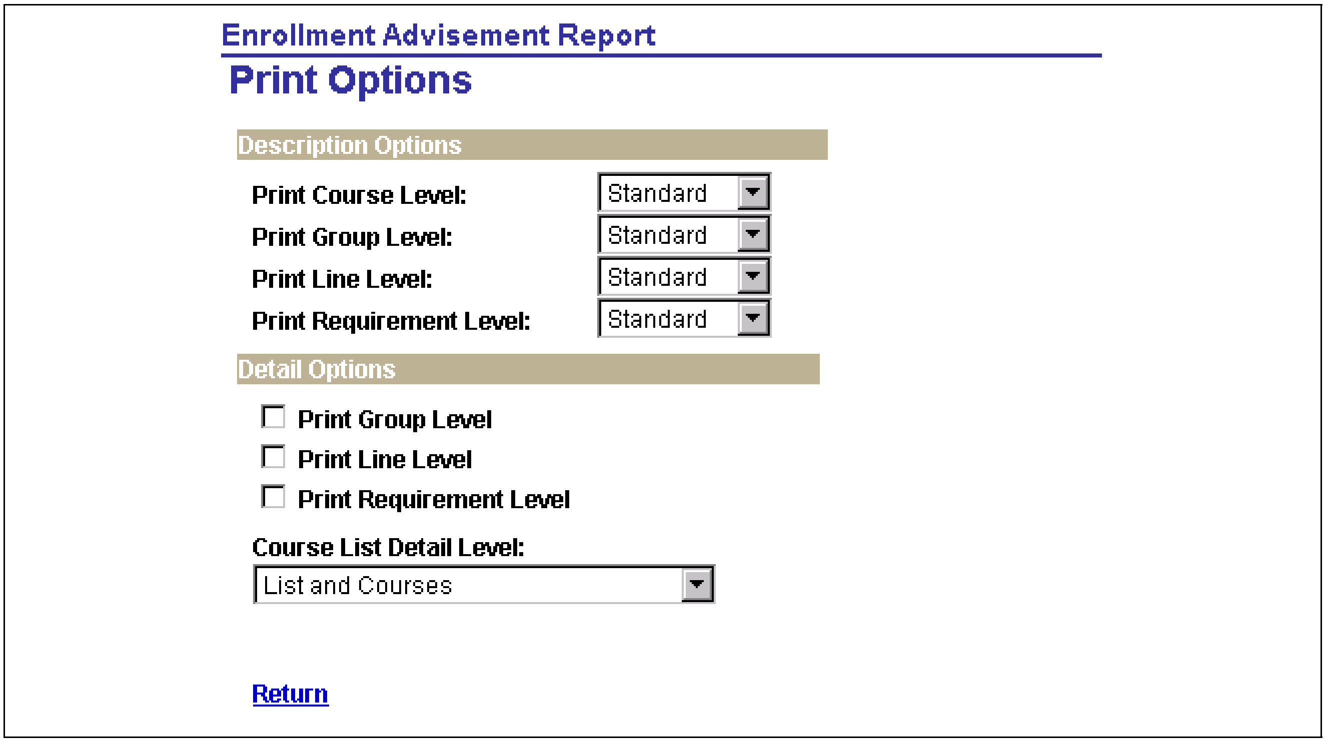
Select to specify that the blank fields on this page represent actual values. For example, if the check box is selected and the Academic Group field is left blank, then the report will not contain enrollment requirement groups with an academic program because no program has been specified. If the check box is not selected, the blank field acts as a wildcard and every enrollment requirement group with an academic group in the specified academic institution will be contained in the report.

Print Options

Click to access the Enrollment Advisement Report – Print Options page, where you can define specific detail about the level of information to print for each enrollment requirement group.

Defining Enrollment Advisement Report Print Options

Access the Enrollment Advisement Report – Print Options page.



Enrollment Advisement – Print Options page

Description Options

Print Course Level

Select the type of course description that is contained in the report:

None: Indicates that a description is not printed in the report.

All: Indicates that the standard, short, and long descriptions on the Course List Description page are printed in the report.

Long: Indicates that the long description on the Course List Description page is printed in the report.

Standard: Indicates that the description on the Course List Description page is printed in the report.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Group Level

Select the type of requirement group description that is contained in the report:

None: Indicates that a description is not printed in the report.

All: Indicates that the standard, short, and long descriptions on the Requirement Group page plus the catalog description are printed in the report.

Catalog: Indicates that the description on the Requirement Group page is printed in the report.

Excpt Cat: Indicates that the standard, short, and long descriptions on the Requirement Group page are printed in the report.

Long: Indicates that the long description on the Requirement Group page is printed in the report.

Standard: Indicates that the description on the Requirement Group page is printed in the report.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Line Level

Select the type of line description that is contained in the report:

None: Indicates that a description is not printed in the report.

All: Indicates that the standard, short, and long descriptions on the Requirement Line Item page are printed in the report.

Long: Indicates that the long description on the Requirement Line Item page is printed in the report.

Standard: Indicates that the description on the Requirement Line Item page is printed in the report.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Requirement Level

Select the type of requirement description that is contained in the report:

None: Indicates that a description is not printed in the report.

All: Indicates that the standard, short, and long descriptions on the Requirement page are printed in the report.

Long: Indicates that the long description on the Requirement page is printed on the report.

Standard: Indicates that the description on the Requirement page is printed in the report.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Detail Options

Print Group Level Select to print the requirement group detail on the report. If the check box is not selected, no group detail is printed.

Print Line Level Select to print the line detail on the report. If the check box is not selected, no line detail is printed.

Print Requirement Level Select to print the requirement detail on the report. If the check box is not selected, no requirement detail is printed.

Course List Detail Level How the course list detail appears in the report. Choices include None, List and Courses, List and Courses with Detail, List Only, and List Only with Detail. (The default value is List and Courses.) None converts to List and Courses. List and Courses indicates that the course list plus specific courses are printed in the report. List and Courses with Detail indicates that the course list plus specific courses with detail are printed in the report. List Only indicates that the course list only is printed in the report. List Only with Detail indicates that the course list with detail is printed in the report. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Return Click to return to the Enrollment Advisement Report page.

CHAPTER 6

Setting Up Instructor Workload

This chapter provides an overview of instructor workload and instructor workload formulas, and discusses how to implement instructor workload setup tables.

See Also

Chapter 18, "Tracking Instructor Workload," page 425

Understanding Instructor Workload

Higher-education institutions, particularly community colleges, need to set maximum limits on the workload assigned to the faculty and other individuals. These institutions also need to track and report actual workload assignments. To accommodate these needs, PeopleSoft Student Records has a feature called Instructor Workload, which performs full-time equivalency tracking.

The Instructor Workload feature enables you to monitor the instructional and noninstructional workload for selected faculty, instructors, and staff. This feature enables you to define workload limits for groups or individuals. In addition, you can define multiple types of instructional and noninstructional work assignments, using different workload standards for each type of assignment. You can have separate workload upper limits for part-time and full-time individuals and can set automated controls that prevent workload assignments beyond those limits.

If you use the Instructor Workload feature, the system automatically updates full-time equivalency workload values when you enter data on the class scheduling pages. You can also use a background process to copy workload data from one term to another, to update term workload records, or to produce a simple report.

Note. The term instructor predominates in this PeopleBook and in field names on pages but may include any individual with an employee ID at the institution. Advisors, teaching assistants, even students, can be tracked using this feature. All of this is entirely user-defined.

The following formulas are the two primary calculations that the Instructor Workload feature performs to update an individual's total term full-time equivalency percentage. Refer to these formulas for clarification once you are familiar with all of the setup pages.

Course Component Workload Hours Formula

The Instructor Workload feature uses the following formula to calculate a course component's default workload hours on the Meetings page:

[(academic progress units x assigned percent) + (component workload hours x assigned percentage)] x (subject/component multiplier) x (instructor term multiplier) x (load factor)

Note. The system populates the multiplier values to 100 percent by default if the user does not specify them.

At the academic institution level (Academic Institution 4 page), workload hours for courses are a combination of *academic progress units* and *component workload hours* (for example, 0 percent academic progress units and 100 percent component workload hours). Workload hours for noncourses are entered directly on the Term Workload page.

The Academic Subject Table has a *subject/component multiplier* specific to both the subject and component (for example, math laboratory component multiplier 80 percent, math lecture component 110 percent, math independent study component 50 percent, and so on).

The Term Workload page has an *instructor term multiplier* that defaults from the Instructor Assignment Class table.

To divide one course component into more than one assignment, you can use a *load factor.* Inserting multiple rows per course component and assigning each one a load factor (percentage) enables you to divide a component into different assignment types, divide a component among instructors, or both. For example, you might assign instructor A to teach 30 percent of the lecture component, and instructor B to teach 70 percent of the lecture component. It is the user's responsibility to set the load factor. The total load factor for one course component should equal 100 percent.

Note. You must manually enter workload hours for all assignments made directly on the Term Workload page. In other words, the system does not populate these types of manual noncourse-based assignments by default using the previous calculation.

In the following example, instructor A is sharing the teaching load for Math 200 with another instructor. This is why you set the load factor to 50 percent. This causes the default workload hours to change from 5 to 2.5 and the assignment full-time equivalency percent to change from 33.33 percent to 16.67 percent. Notice that instructor B, who is sharing the load with instructor A to teach Math 200, somehow earns an assigned FTE of 33.33 percent. In addition, the default workload hours read 5, rather than 2.5 as they do for instructor A. This is because you have assigned a multiplier of 200 percent to instructor B for this term. All class components to which you assign instructor B count double for this term. Also, notice that instructor A is supervising an independent study course, Physics 499. This subject and component are set to be multiplied by only 50 percent. This is so that, whoever teaches physics with a component of independent study, earns half credit for the task. Because of this, even though the component workload hours of 3 are 10 percent of the 100 percent weekly workload hours for this assignment type, the subject component multiplier halves this value so that the instructor earns an assigned FTE of 5 percent. This process also causes the default workload hours to differ from those set on the Class Associations - Class Components page (halved from 3 to 1.5).

Instructor	Assign-ment	Class Assoc Component Page Wrkld Hrs	Subject/ Comp. Multiplier	Assign Type/ 100% Wkly Wrkld Hrs	Load Factor	Meetings Page Default Wrkld Hrs	Assign FTE
Instructor A Term Multiplier = 100%	Math 200	5	Math Lecture/ 100%	RegLec/ 15	50%	2.5	16.67%
	Physics 201	5	Phys Lecture/ 100%	RegLec /15	100%	5	33.33%
	Physics 499	3	Phys Ind Study /50%	IndStudy /30	100%	1.5	5%
							Total Term FTE% = 55%
Instructor B Term Multiplier = 200%	Math 200	5	Math Lecture/ 100%	RegLec/ 15	50%	5	33.33%
						Total Term FTE% = 33.33%	Total Term FTE% = 33.33%

Instructor Assignment Percentage Formulas

The Instructor Workload feature uses three formulas to calculate an individual's assignment full-time equivalency percentage. The system uses one of two formulas to calculate assignment FTE for regular classes and for open entry and open exit (OEE) classes. It uses another formula to calculate assignment FTE for assignments made directly to the Term Workload page.

Regular Assignment FTE Formula

The system uses the following formula to calculate an individual's assignment full-time equivalency percentage for a regular scheduled class (non-OEE):

(assignment workload hours x assigned number of weeks x 100) / (100 percent weekly workload hours x total weeks in term)

assignment workload hours The number of workload hours assigned to the instructor.

assigned number of weeks The total number of weeks in the session for which the instructor is teaching. This number is derived from the session table.

100 percent weekly workload hours The standard number of weekly hours required (for example, 15 hours). This number is derived from the assignment type table.

total weeks in term Derived from the term/session table.

Open Entry and Open Exit Assignment FTE Formula

The system uses the following formula to calculate an individual's assignment full-time equivalency percentage for an OEE class:

(assignment workload hours x assigned number of weeks x 100) / (100 percent OEE workload hours x total weeks in term)

assignment workload hours The number of workload hours assigned to the instructor.

assigned number of weeks The total number of weeks in the session for which the instructor is teaching. This number is derived from the session table.

100 percent OEE workload hours The standard number of term hours required (for example, 225 hours). This number is derived from the assignment type table.

The formula that the Instructor Workload feature uses to calculate an individual's assignment full-time equivalency percentage from an assignment made directly to the Term Workload page is as follows:

(assignment workload hours x 100)(100 percent weekly workload hours)

assignment workload hours The number of workload hours assigned to the instructor.

100 percent weekly workload hours The standard required (for example, 15 hours). This number is derived from the assignment type table.

Examples of FTE Percent Formulas

The following example shows instructor C's assignments. The Biology 100 lecture is quite straightforward. Three workload hours, compared to a 100 percent weekly workload hours value of 15, result in the Biology 100 course totaling 20 percent of the instructor's workload (3 hours is 20 percent of 15 hours). The Biology 100 lab, however, is associated with an assignment type of *NotIncl/0* (do not include). This results in zero workload hours, therefore contributing no assignment FTE percentage.

In addition, instructor C teaches Biology 105 over the internet, with an assignment type of *Internet.* Notice that this assignment type has a 100 percent weekly workload hours value of 6, which means that 6 hours taught on the internet is 100 percent of an individual's workload. This course assignment creates an assignment FTE of 50 percent (3 hours is 50 percent of 6).

Finally, instructor C advises the Pre-Med Club. This assignment has a workload hours value of 9, which translates into 30 percent of the instructor's assignments (9 is 30 percent of 30).

Instructor D is a good example of how an individual can earn a total term FTE of 100 percent, while assigned only to advising (no class instruction). All types of assignments can contribute to total term FTE percentage.

Instructor E shows how open entry and open exit classes can effect FTE. This instructor teaches Psych (psychology) 210, with a workload hours value of 60. Because this section of Psych 210 is an OEE class, multiply the workload hours by the total weeks in the session, then multiply by 100 (60 x 15 x 100 = 90000). Divide the result by the 100 percent OEE workload hours (225), times the total weeks in the session (15), and you get an FTE of 26.67 percent for this class.

Instructor	Assign-ment	Com-ponent	Class Compnt Wrkld Hours/ [OEE Wkld Hrs]	Assign Type/ 100% Wkly Wkld Hrs or [100% OEE Wkld Hrs]	Asnmnt FTE%
Instructor C	Biology 100	Lecture	3	RegLec/15	20%
	Biology 100	Laboratory	1	NotIncl/0	0
	Biology 105	Lecture (Internet)	3	Internet/6	50%
	Advise Pre-Med Club	N/A	9	Student Club Advisor/ 30	30%
					Total Term FTE% = 100%
Instructor D	Advise Math Club	N/A	15	Student Club Advisor/ 30	50%
	Advise Math Honor Society	N/A	15	Student Club Advisor/ 30	50%
					Total Term FTE% = 100%
Instructor E	Psych 210	OEE Lecture	[60]	[RegLec/225 (15 weeks)]	26.67%
	Psych 378	OEE Lecture	[90]	[RegLec/225 (15 weeks)]	40%
	Psych 378	Lecture	3	RegLec/15	26.67%

Instructor	Assign-ment	Com-ponent	Class Compnt Wrkld Hours/ [OEE Wkld Hrs]	Assign Type/ 100% Wkly Wkld Hrs or [100% OEE Wkld Hrs]	Asnmnt FTE%
	Advise Psych Club	N/A	1	Student Club Advisor/9	11.11%
					Total Term FTE% = 104.45%

Prerequisite

Before you can track instructor workload, PeopleSoft Student Records setup tables must be fully operational so that the faculty workload pages can retrieve complete and accurate data.

See Also

Chapter 1, "Getting Started With PeopleSoft Student Records ," page 1

Implementing Instructor Workload Setup Tables

Here's how to set up instructor workload:

1. Create assignment types.
2. Create instructor assignment classes.
3. Activate the Instructor Workload feature by selecting Calculate Workload check box and update required fields.
4. Update Academic Subject table with component multiplier percentage.
5. Update Course Catalog - Components page with workload hours as necessary.
6. Adjust workload hours on Class Components page as necessary.
7. (Optional) Update Term Workload page with instructor assignment class value and other data.

   This task is optional because assignments made on the Meetings page automatically create a Term Workload record for the individual if none exists for the term that you are assigning. However, this process uses default values to specify a full-time equivalency percentage for the individual.
8. Schedule a new course, assign instructor, and enter workload hours if needed.

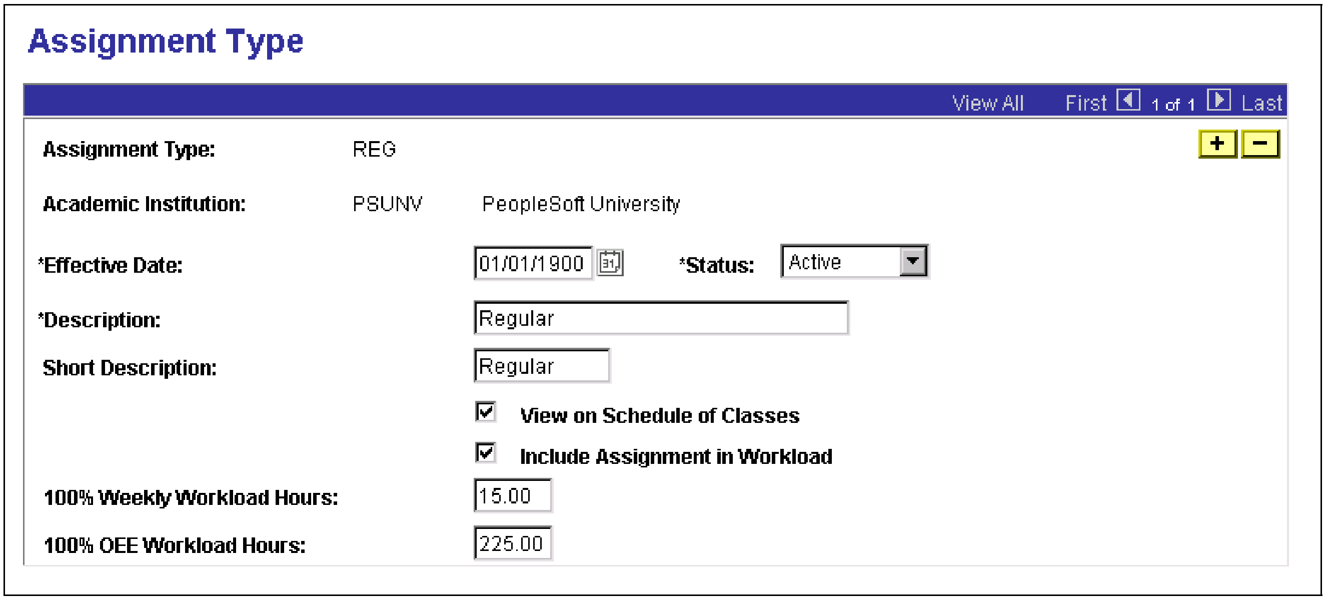
9. Update workload hours once you schedule a course, or manually create a noncourse assignment on the Term Workload page.
10. Return to Term Workload page so that you can view the instructor’s updated workload.

Pages Used to Set Up Instructor Workload Data

Page Name	Object Name	Navigation	Usage
Assignment Type	ASSIGNMENT_TYPE	Design Student Administration, Design Academic Structure, Setup, Assignment Type, Assignment Type	Establish new assignment type values that can be associated with course components or other noncourse-based instructor assignments.
Instructor Assignment Class	INSTRUCTOR_CLASS	Design Student Administration, Design Academic Structure, Setup, Instructor Assignment Class, Instructor Assign Class	Establish new instructor assignment class values and defaults that the system can reference on both the Term Workload page and the Academic Institution 4 page. Enter an alphanumeric code (one to six characters in length) for the instructor assignment class. Each instructor assignment class value is associated with only one academic institution.
Academic Institution 4	INSTITUTION_TABLE4	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 4	Activate the Instructor Workload feature and to establish high level limits, workload preferences, and default values for instructor workload at your institution. Before you access the Academic Institution page, create an assignment type and an instructor assignment class.
Subject Workload	SUBJ_WORKLD_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Subject Table, Subject Workload	Specify the weight of each component in each subject.
Components	CRSE_CATALOG_CMPNT	Manage Student Records, Establish Courses, Use, Course Catalog, Components	Enter workload hour data that serve as a default value that the system uses to populate the same components on the Class Components page when you schedule a class.
Class Components	CLASS_ASSOC_CMPNT	Manage Student Records, Establish Courses, Use, Class Associations, Class Components	Use the Workload Hours field to enter or update workload hours data for each scheduled class component of a course.

Creating Assignment Types

Access the Assignment Type page



Assignment Type page

The assignment type affects how the system calculates the assignment full-time equivalency percentage when you assign an instructor to a course component (on the Meetings page) or to any other type of manual assignment (on the Term Workload page).

Note. To use the Instructor Workload feature, an Assignment_Type with ASSIGN_TYPE = 'NON' must exist (hard-coded) for each academic institution in your database. This value is automatically created when activating the feature on the Academic Institution 4 page. You cannot delete or inactivate these values for any academic institution where you have activated the Instructor Workload feature.

Assignment types might include *standard lecture class, standard lecture Internet, standard lab, overload, unpaid, academic counseling, thesis supervision,* and so on. For example, a course taught on the internet might weigh differently than a course taught in a classroom. You can create different assignment types to represent this variation. In addition, some assignment types (such as academic counseling) might not be applicable for association with a course. In these instances, you can specify assignment type options that disable this value as a choice on the Meetings page.

Effective Date

Enter an effective date for the assignment type value that you establish on this page.

Note. You can use only those assignment types with effective dates that are earlier than or the equal to the Academic Institution table's effective date as academic institution defaults on the Academic Institution 4 page.

Assignment types with effective dates later than the Academic Institution table's effective date can still be used throughout the system; they simply cannot be set up as academic institution default values.

Status

Select a status for the assignment type value. Select *Active* when adding a new assignment type. Use the *Inactive* option only if your institution no longer uses the listed values. In particular, you cannot inactivate assignment type values (set on the Academic Institution 4 page) that the system references. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Short Description Enter the short description to associate with the assignment type value. This description appears in the grid on the Meetings page and on the Term Workload page. Be sure to use a short value that clearly describes the assignment type value. For example, you might want to describe an assignment type of Standard 15-Hour Assignment with a short description of *Stnd15.* In that case, the grid prompt value also appears as *Stnd15.* The short description is to the first ten characters of the description.

View on Schedule of Classes Select if you want the assignment type to be an available drop-down choice on the Meetings page. This check box does not control whether the assignment type appears on the Schedule of Classes report; it simply determines whether the assignment type can be associated with a course component. Leave this check box clear if you do not want the assignment type available for pairing with components. For example, an assignment type of *academic counseling* or *student club advisor* might not be something you want associated with a course component. It is an assignment type created specifically for use on the Term Workload page. In this case, do not select this check box. On the other hand, an assignment type of *In-person lecture* might be something you want available on the Meetings page. In this case, do select this check box.

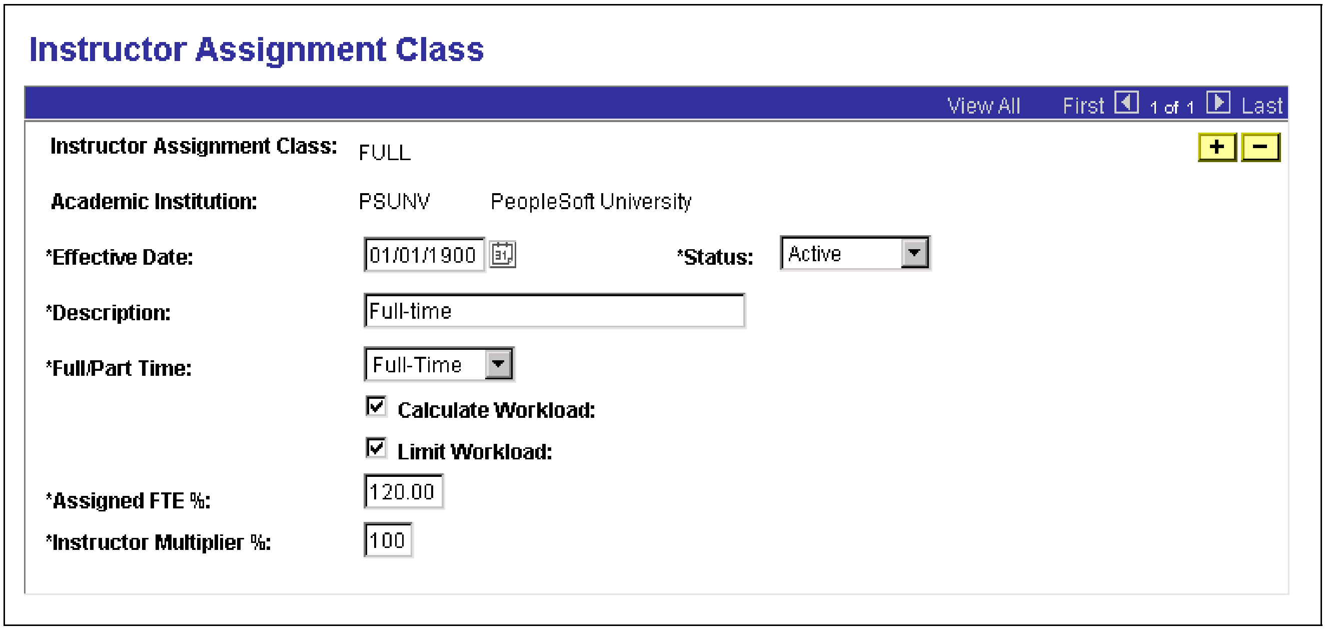
Include Assignment in Workload Select if you want components with this assignment type to be included in the instructor's total term full-time equivalency percentage.

100% Weekly Workload Hours Enter the 100 percent weekly workload hours value that specifies the normal weekly workload for this assignment type. This field enables you to assign different weekly full-time hours for different assignment types. For example, the standard class lecture full-time hours might be 15 per week, the standard internet lecture full-time hours might be 20 per week, and academic counseling full-time hours might be 35 per week.

100% OEE Workload Hours If this assignment type can be affiliated with classes that are offered in an open entry and exit format, enter a 100 percent OEE workload hours value that represents the full time load for an entire term. For example, if you have a 100 percent weekly workload hours value of *15* for this assignment type, you can multiply this by the umber of weeks in the term to which this assignment type belongs (100 percent weekly workload hours [*15*] x number of weeks in a term [*15*] = 100 percent OEE workload hours [*225*]).

Creating Instructor Assignment Classes

Access the Instructor Assignment Class page.



Instructor Assignment Class page

Instructor assignment class values cluster different types of individuals with similar workload requirements. Individuals in a particular instructor assignment class can have the default settings that you establish here modified on the Term Workload page.

Effective Date

Enter an effective date for the instructor assignment class that you establish on this page.

Note. Only those active instructor assignment classes with effective dates less than or equal to the Academic Institution table's effective date can be used as academic institution defaults on the Academic Institution 4 page.

Instructor assignment classes with effective dates greater than the Academic Institution table's effective date can still be used throughout the system but not set up as academic institution default values.

Status

Select a status for the instructor assignment class. Select *Active* when adding a new instructor assignment class. Use the *Inactive* option only if your institution no longer uses the value listed. In particular, you cannot inactivate an instructor assignment class that the system references on the Academic Institution 4 page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Description

Enter the description to associate with the instructor assignment class value. All alphanumeric characters are valid. This description appears in a related display on the Term Workload and Academic Institution 4 pages.

Full/Part-Time

Select a full-time or part-time value to indicate the traditional status of instructors assigned to this instructor assignment class. The default is *Full-Time.* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Calculate Workload

Select to apply the Instructor Workload feature to instructors in this assignment class by default. This selection determines if the system creates term detail records at all. This selection alone does *not* control whether the Instructor Workload feature produces a limit warning. You must select the Limit Workload check box in conjunction with this check box for warnings to appear. If you want to set up an instructor assignment class specifically for those instructors who never have load calculations performed, set up a separate instructor assignment class and do not select this check box. The value selected here populates the Calculate Workload check box on the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.

Limit Workload

Select to apply the limits to instructors in this instructor assignment class by default. This feature controls whether the system produces errors or warnings when assignments cause an individual's total term FTE percent to exceed either their assigned FTE percent or the academic institution warning limits, whichever comes first. If you select the Calculate Workload check box, this check box is available. The value selected here populates the Limit Workload check box on the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.

Assigned FTE % (assigned full-time equivalency percent)

Enter the assigned FTE percentage to indicate the traditional assignment of instructors assigned to this instructor assignment class. This value represents the percentage of the institution-wide standard to assign to instructors in this class. For example, a field value of *100.00* enables you to make assignments for instructors in this instructor assignment class up to a total term FTE percent of 100. If you want to hold instructors in this instructor assignment class to only 80 percent of the institution-wide standard, then you might set the value to *80.00.* Finally, if you often overbook full-time instructors in a particular instructor assignment class (perhaps to ultimately drop them from an assignment at the beginning of the term), then you might want to give the scheduling process some breathing room and set this value to *120.00.* This field's default value corresponds with the full-time and part-time value that you select. The value entered here populates the Term Workload page as a default value for individuals in this instructor assignment class.

You can change this setting on an individual and term-by-term basis on the Term Workload page.

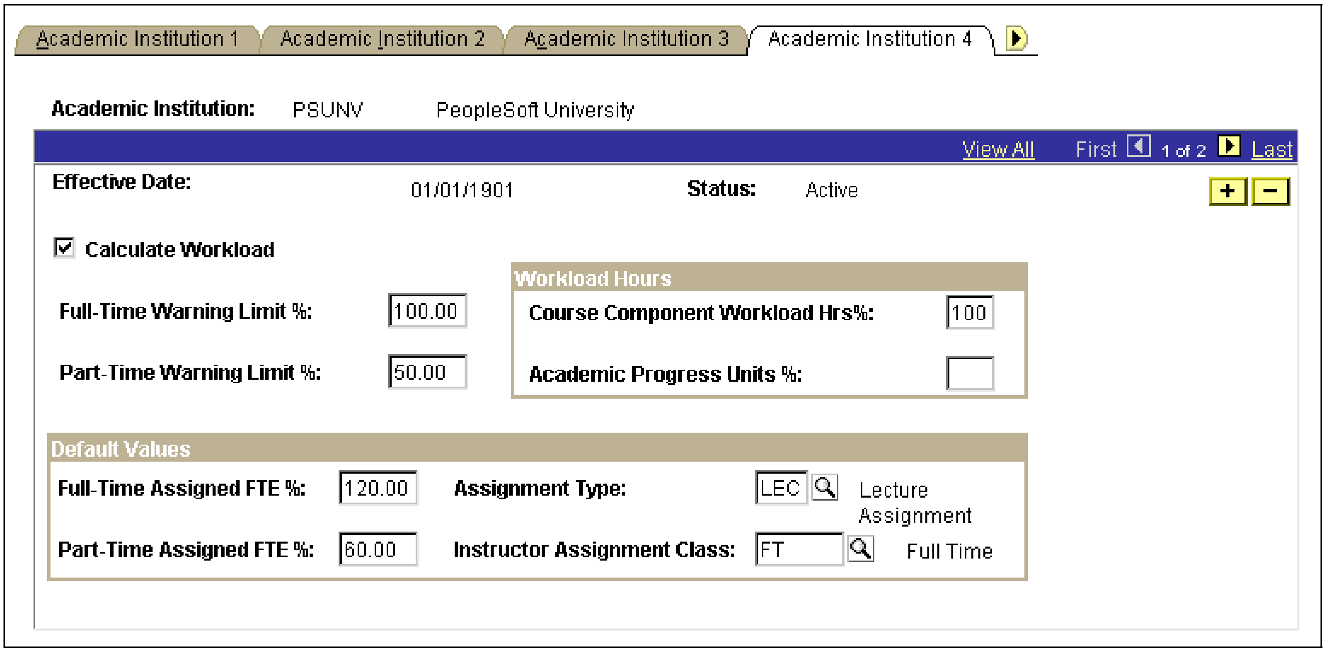
Instructor Multiplier %

Enter the instructor multiplier percent to associate with this instructor assignment class. This value contributes to the default workload hours formula for courses assigned on the Meetings page for individuals in this instructor assignment class. For example, if you want to give a certain group of instructors double credit for the course components to which they are assigned, set this value to *200.* On the other hand, if you want instructors to get only half credit for their course assignments, you might assign them to a different instructor assignment class with this field set to *50.* This multiplier does not apply to noncourse-based assignments made directly to the Term Workload page. By default, this field displays

100 when you are in Add mode. The value entered here populates the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.

Defining Instructor Workload Preferences for Your Institution

Access the Academic Institution page.



Academic Institution 4 page

Calculate Workload

Select to activate the workload feature for your institution and to display related fields. Before you select this check box, you may want to insert a new effective-dated row on the Academic Institution 1 page.

Full-Time Warning Limit %

Enter the full-time warning limit percent for the Instructor Workload feature to reference at all times across the institution. This value indicates the institution-wide setting for those individuals assigned to an instructor class that is *full-time.* If an assignment is made which causes a full-time individual's total term FTE percentage to exceed this value, the system produces a soft warning. The system only produces the soft warning if the individual's Limit Workload check box is selected on the Term Workload page.

Part-Time Warning Limit %

Enter the part-time warning limit percent for the Instructor Workload feature to reference at all times across the academic institution. This value indicates the institution-wide setting for those individuals assigned to an instructor class that is *part-time.* If an assignment is made which causes a part-time individual's total term FTE percentage to exceed this value, a soft warning is produced. The system produces the warning only if the individual's Limit Workload check box is selected on the Term Workload page.

Choosing How to Sum Workload Hours

Course Component Workload Hrs% (course component workload hours percent)

Enter a percentage to specify your institution standard for compiling course workload. For example, you might want to calculate workload hours based solely on the defined workload hours associated with the course component. In this instance, set the Course Component Workload Hrs% field to *100* and the Academic Progress Units % field to *0* (or leave this second field clear altogether). When these two fields are set this way, any time that you assign an instructor to teach a course component at the specified academic institution, the course component workload hours calculation uses only the course component workload hours value (and not the progress units) for the course. In addition, if you want to sum workload hours based on both fields, you can do this by setting each of the fields to the appropriate percentages. In this instance, ensure that the two values total 100.

Academic Progress Units %

Enter a percentage to specify your institution standard for compiling course workload. For example, you might want to calculate workload hours at your institution based solely on the academic progress units associated with the course component. In this instance, set the Course Component Workload Hrs% field to *0* (or leave this second field clear altogether) and the Academic Progress Units % field to *100.* When these two fields are set this way, any time that you assign an instructor to teach a course component at the specified academic institution, the course component workload hours calculation uses only the academic progress units for the overall course as set on the Class Associations page (and not the course component workload hours). This causes any component of the course (lecture, laboratory, and so on) to be calculated based on the academic progress units for the overall course as set on the Class Associations page. In addition, if you want to sum workload hours based on both fields, you can do this by setting each of the fields to the appropriate percentages. In this instance, ensure that the two values total 100.

Note. The field values above apply only to assignments made on the Meetings page. Although not required by the system, we suggest that these two fields total 100.

Note. Workload hours for assignments made directly to the Term Workload page (which are not course-based) do not reference either the Course Component Workload Hrs% or Academic Progress Units % fields. Instead, the user enters the assignment workload hours manually. For example, an assignment made directly to the Term Workload page for *advising the math club* might have a manually assigned workload entry of *3* to represent the number of hours per week that this assignment requires.

Assigning Workload Hours to Courses and Class Components

Workload for courses can comprise academic progress units and course component workload hours. If your Academic Institution 4 page setting specifies that some percentage (1-100) of workload comprises course component workload hours, specify course workload hours in the course catalog. In addition, you might want to specify or update these hours for each component on the Class Associations - Class Components page.

Specifying Default Values for Your Institution

Full-Time Assigned FTE % (full-time assigned full-time equivalency percent)
Enter the full-time assigned FTE percent to appear in the Assigned FTE % field on the Instructor Assignment Class page when a Full/Part Time field value of *Full-Time* is selected on that page. This is only a default value, and you can change it on the Instructor Assignment Class page.

Part-Time Assigned FTE % (part-time assigned full-time equivalency percent)
Enter the part-time assigned FTE percent to appear in the Assigned FTE % field on the Instructor Assignment Class page when a Full/Part Time value of *Part-Time* is selected on that page. This is only a default value, and you can change it on the Instructor Assignment Class page.

Assignment Type
Enter the assignment type to appear on the Meetings page each time that the system assigns a course component. This setting is only a default value, and you can change it on the Meetings page.

Instructor Assignment Class
Enter the instructor assignment class to appear on the Term Workload page. This setting is only a default value, and you can change it on a case-by-case basis on the Term Workload page.

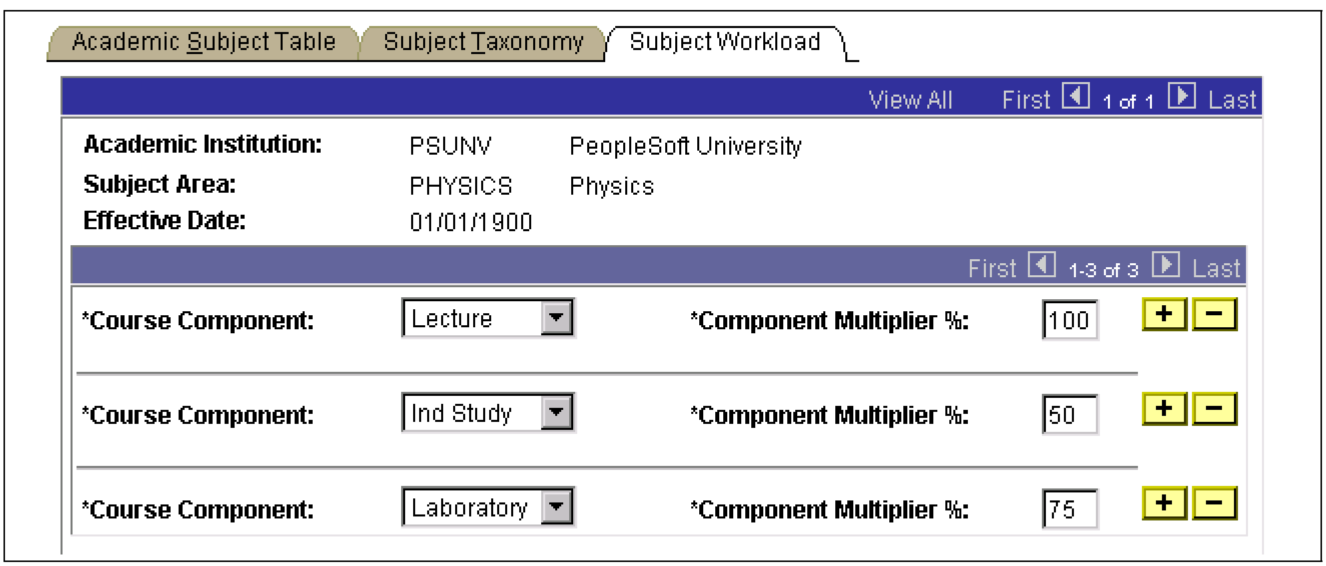
Note. You cannot inactivate or delete the assignment type and instructor assignment class referenced on the Academic Institution 4 page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Defining Academic Institutions

Defining Subject/Component Multipliers

Access the Subject Workload page.



Subject Workload page

The system uses these values as part of the course component workload hours formula to calculate the assignment FTE percentage on the Meetings page. You do not need to enter values for course components multiplied by 100 percent.

Course Component

Select a course component to associate with courses in the academic institution and subject area that you specify. Values for this field are delivered with your system as translate values. You can modify these values. The course component value indicates the parts of the course offering; for example,*Lecture, Laboratory, Ind Study* (independent study), and so on.

One subject area can have multiple components.

See Chapter 4, "Setting Up the Course Catalog," Defining Course Components, page 82.

Component Multiplier %

Enter a component multiplier percentage value that represents the weight of this type of component. By default, this field displays *100.* This system uses this value as part of the course component workload hours formula to calculate default workload hours on the Meetings page. You do not need to enter values for course components multiplied by 100 percent unless you prefer to store this data for documentation.

As noted in the workload hours formula, multiplier values are 100 percent by default if they are not found.

See Chapter 6, "Setting Up Instructor Workload," Course Component Workload Hours Formula, page 139.

Linking Workload Hours to Courses

You can use the Workload Hours field and the OEE Workload Hours (open entry and exit workload hours) field on the Course Catalog - Components page to enter workload hour data. The value that you specify in each of these fields serves as a default value that the system uses to populate the same components on the Class Components page when you schedule a class. In other words, if you set the lecture Workload Hours field to *3* on the Course Catalog - Component page, then whenever you schedule a lecture for this course, the lecture component Workload Hours field has a default value of 3 workload hours on the Class Components page for this component. Similarly, if you set the lecture OEE Workload Hours (open entry and exit workload hours) field to *45* on the Course Catalog - Component page, then whenever you schedule a lecture for this course in an open entry and open exit session, the lecture component OEE Workload Hours (open entry and exit workload hours) field has a default value of 45 workload hours on the Class Components page. You then need to modify the component values on the Class Components page if necessary.

See Also

Chapter 4, "Setting Up the Course Catalog," Defining Course Components, page 82

Linking Workload Hours to Class Components

Use the Workload Hours field on the Class Associations - Class Components page to enter or update workload hours data for each scheduled class component of a course.

See Also

Chapter 17, "Managing the Schedule of Classes," Modifying Class Components, page 388

CHAPTER 7

Setting Up Transfer Credit Processing

This chapter provides an overview of transfer credit and addresses all of the necessary setup to complete before processing transfer credit, explaining how to:

- Define external organizations.
- Set up external subjects.
- Set up external school subjects.
- Enter external subjects.
- Set up external terms.
- Set up test and component information.
- Set transcript and statistics defaults.
- Make overall statistics adjustments.
- Define study agreements.
- Create course transfer equivalency rules.
- Convert existing transfer components into component subject areas.
- Copy transfer components between component subject areas.
- Define course equivalencies for academic programs and plans.
- Create test transfer equivalency rules.
- Define test equivalencies for academic programs and plans.

Important! Much of this setup of organizations is shared with PeopleSoft Campus Community and PeopleSoft Recruiting and Admissions. It is important that you coordinate your efforts.

Understanding the Transfer Credit Business Process

This section lists prerequisites and discusses the transfer credit business process.

Prerequisites

Before you set up transfer credit rules and process transfer credit, complete all other setup in PeopleSoft Student Records. You must define academic careers, academic programs, academic plans, the course catalog, grading bases, terms, and sessions. It is helpful to first write out the rules for accepting transfer credit before entering them into the system.

Transfer Credit Business Process

While the setup for Transfer Credit feature is complicated, it saves you hours of time. The setup involves defining the external organizations from which you accept transfer credit and defining all of the subject areas and courses that the external organization can transfer. A key aid to completing the setup for the Transfer Credit feature is to point any external organization or internal institution to any other external organization's or internal institution's catalog of courses. It is thus possible to create one group of external courses that a number of external organizations share. Sharing course information saves time because you do not have to duplicate your data entry effort if one or more organizations have the same or similar courses. It is especially helpful when dealing with a large transfer population from schools where courses are virtually the same or catalogs are shared. For instance, if your academic institution receives many transfer students from a state college system, you can create one catalog of external courses for the state college system where all state colleges in that system can point for these courses.

The foundation of the Transfer Credit process is the transfer equivalency rules that you create. Once you define external organizations, you create equivalency rules for courses and tests, then attach these equivalency rules to specific academic programs and academic plans. You also attach an equivalency rule to an external organization or internal institution.

Once you complete the setup, you are ready to process transfer credit. Transfer credit processing is based on a concept of modeling various scenarios of transfer credit articulation. You set up model scenarios for an individual, dependent on the individual's chosen academic program and plan to demonstrate different options of transferring credit. Based on your setup, you have the ability to model as many scenarios of transferring credit as you want for prospects, applicants, and current students. You furthermore have the flexibility to articulate models based on your predefined rules or ones that you create manually.

Defining External Organizations

Before you can use transfer credit processing, use the Organization Table component to define external organizations. As you define external organizations, specify their location, contacts, departments, and characteristics. Also specify whether the organization is a vendor.

As part of the external organization setup within this component, transfer credit processing requires that you do the following:

- Select the Offers Courses field on the Organization Table page to identify the external organization as one that offers courses.

  This enables you to create external courses to be used in transfer credit articulation rules.

- Enter, on the School Data page, the data that applies to the external organizations that offer courses.

When forming transfer credit rules, the system uses the values that you define for the external organization in the Term Type and Unit Type fields and the Catalog Information group box as system default values. Furthermore, if you indicate that an external organization has a shared catalog with another external organization, the system uses the catalog organization that you specify as the default value on the course Transfer Rule page.

Defining external organizations is shared with PeopleSoft Campus Community and PeopleSoft Recruiting and Admissions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database"

Setting up External Subjects

Use the External Subject Table page to define subject categories found at external organizations. You then link these subjects to external organizations and the courses they offer. The subject area that you enter on the External Subject Table can be tied to specific external organizations on the School Subject Maintenance page. For every external organization from which you anticipate receiving academic work for transfer articulation, define all subject areas through this page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Organization Data," Entering Codes for External Organizations

Setting Up External School Subjects

This section discusses how to set up external school subjects.

Page Used to Set Up External School Subjects

Page Name	Object Name	Navigation	Usage
School Subject Maintenance	SCHOOL_SUBJECTS	• Build Community, Organization Data, Use, School Subject Maintenance • Manage Student Records, Process Transfer Credit, Setup, School Subject Maintenance	Link external subjects to specific external organizations, specifying the subject areas that your institution accepts as transfer credit from the external organization. You will use these subject areas to build external courses.

Linking External Subjects to External Organizations

Access the School Subject Maintenance page.

Important! One external organization's catalog of courses can be used by multiple institutions. Plan carefully before you use this page to enter every subject area for every institution from which you might receive transfer credit.

School Subject Select a school subject for the external organization from the prompt box, or manually enter a school subject into the field. This field contains no edits and thus enables you to enter any value. Only the values in the prompt box will show a description.

External Subject Area Select the external subject area that corresponds to the school subject. This field is useful when an external organization has a number of school subjects that are the same but have different names, such as *ENGL* and *English.* You can associate both school subjects with each other, for example, by tying each school subject to the external subject area of *ENGL.*

Entering External Courses

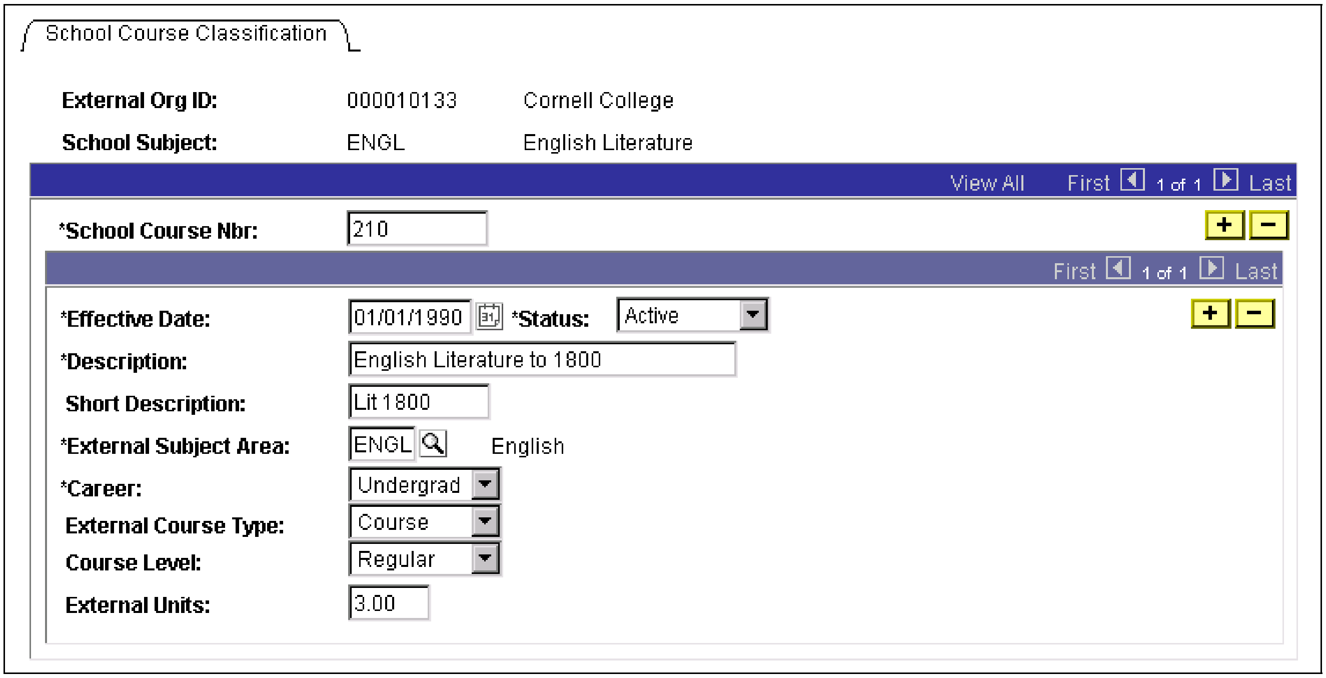
This section discusses how to record external courses.

Page Used to Enter External Courses

Page Name	Object Name	Navigation	Usage
School Course Classification	SCHOOL_COURSES	• Build Community, Organization Data, Use, School Course Classification • Manage Student Records, Process Transfer Credit, Setup, School Course Classification	Record the specific course offerings for each subject area of an external organization. You will use these course classifications when you create course transfer rules.

Recording External Courses

Access the School Course Classification page.


School Course Classification

External Org ID: 000010133 Cornell College

School Subject: ENGL English Literature

View All First 1 of 1 Last

*School Course Nbr: 210

First 1 of 1 Last

*Effective Date: 01/01/1990 *Status: Active

*Description: English Literature to 1800

Short Description: Lit 1800

*External Subject Area: ENGL English

*Career: Undergrad

External Course Type: Course

Course Level: Regular

External Units: 3.00

School Course Classification page

Note. If you want to inactivate an external course, you must not only select a status of inactive but also remove the external course from your course equivalency rules.

School Course Nbr (school course number)
: Enter the course number at the specified external organization for the course you are classifying. This is usually the catalog number of the external course.

External Subject Area
: Select the external subject area for this course at the specified external organization. This is where school subjects that are the same but have different names can both be represented by the single external subject area you select.

Career
: Select the career for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

External Course Type
: Select the external course type for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

Course Level
: Select the level for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

External Units
: Enter the number of external units that this course is worth at the specified external organization.

Note. External courses are converted to your academic institution's unit type, based on the rules on the External Term Table page.

Setting up External Terms

Use the External Term page to define external terms. When tracking information regarding external institutions for a prospect, applicant, or student, you may want to know the specific term to which that information is related. For example, if you are entering external transfer credit information, you want to record the term to which the transfer credit information pertains. Because external institutions use various term structures, use this table to define all external terms. You can also set up how you want external terms converted to your term structure.

Note. The system uses the conversion multipliers on the Unit Conversion Table page when calculating internal transfer credit (for instance, transferring between academic careers).

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Organization Data," Entering Codes for External Organizations

Setting Up Test and Component Information

To create test credit transfer rules, define your test components and test codes.

- Use the Test Component page to set up test components used in your rules for test credit equivalencies.

  Example test components include English Composition and Essay, German Language and Listening, and so forth.
- Use the Test Tables page to set up test codes and link test components to them.

Note. Minimum scores are also defined for test transfer equivalency rules.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Processing External Test Score Data"

Setting Transcript and Statistics Defaults

Use the Organization Affiliation page to enter details regarding your institution's affiliation with specific external organizations. The only relevant fields for transfer credit processing, containing the default values for printed transcripts, are in the Transfer Credit Transcript Print group box on this page. You can override the default values for specific transcript types on the Transfer/Test/Other Credits page of the Transcript Type component.

Level of Detail

Select from the following choices the transfer credit level of detail to print on transcripts for a student transferring credit from this external organization.

Summary: Select this option to print a student's total transferred units and grade point average (GPA) from this external organization on the student's transcript. Select this option if you use the Historical Course Enrollment page for your conversion process.

Detail: Select this option to print what you choose in the Details to Print field.

Details to Print If you select *Detail* in the Level of Detail field, use this field to select the details to print on the transcript: *None, External Courses, External and Internal* (courses), *Internal Equivalent Courses.*

Include Transfer Credit in GPA Select if you want the transfer credit from this organization to be included in the student's GPA. If you clear this check box, the system does not include transfer credit grade points in the student's GPA.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database," Entering Affiliations with Organizations

Making Overall Statistics Adjustments

Use the Terms in Residence page to modify a student's terms in residence or to adjust transfer credit values.

See Also

Chapter 22, "Maintaining Student Career Term Records," Maintaining a Student's Terms in Residence, page 487

Defining Study Agreements

You can attach study agreements to individual student records on the External Study page of the Term Activation component. Study agreement codes are normally used to represent study abroad, exchange, and visiting programs.

This section discusses how to create study agreements.

Page Used to Define Study Agreements

Page Name	Object Name	Navigation	Usage
Study Agreement Table	STUDY_AGREEMNT_TBL	Manage Student Records, Manage Academic Records, Setup, Study Agreement Table	Create study agreements for use with external organizations.

Creating Course Transfer Equivalency Rules

This section provides an overview of course transfer equivalency rules and discusses how to:

- Define component subject areas.
- Define subject area elements.
- Review and adjust incoming course information.
- Define course transfer rules.

Understanding Course Transfer Equivalency Rules

After you have set up all of the tables discussed previously in this chapter, you can begin to create your course transfer equivalency rules. The Transfer Credit process enables you to articulate course credit manually or with predefined course transfer equivalency rules. Most likely, you will create predefined rules for external organizations or internal academic institutions from which you receive the majority of your transfer students. You can create manual rules for those organizations from which you infrequently receive transfer students.

In this section, we review how to create the predefined course equivalency transfer rules for modeling transfer articulations for a prospect, applicant, or student. An equivalency rule is attached to an external organization or internal academic institution and can contain numerous transfer components. You might even decide to define more than one course transfer equivalency rule for an external organization or internal academic institution to account for academic program and academic plan differences in articulation rules.

The term *component* is used throughout this chapter and should be distinguished from the same term used in PeopleTools, which refers to a page or group of pages under a menu item. In the Transfer Credit feature, a component ties each incoming course and its internal equivalents together. Thus, for each incoming course and its matched equivalent there is a corresponding component. These data elements together represent a line or sequence within the overall course transfer rule. Thus, a course transfer rule is generally made up of hundreds, possibly thousands, of components, each of which contains a number of data elements, including the transfer priority number, the incoming courses, and the internal equivalents. For simplicity, we refer to components related to transfer credit as *transfer components.*

To manage this large volume of transfer components, group them into distinct component subject areas for each external organization or internal academic institution by using the Transfer Subject Area component. Because component subject areas are user-defined and not enforced by your academic institution's Subject table, you can define a component subject area with a value that can later be associated with a given course transfer equivalency rule. For example, you can create for an external organization a component subject area called Mathematics and define all of the incoming math and statistics courses and their internal equivalent courses within this component subject area. Or you can define one component subject area for math courses and one component subject area for statistics courses.

After you define component subject areas you will use the Course Transfer Rules component to assign component subject areas to the course transfer rules that you create for each external organization or internal academic institution.

The system stores the data for each component subject area in intermediary tables (TRNSFR_RULE and TRNSFR_RSUB) that are independent of the course-transfer equivalency rule tables (TRNSFR_SUBJ, TRNSFR_COMP, TRNSFR_FROM, TRNSFR_TO). All of these tables are associated with each other through parent-and-child relationships in the table structure.

Articulating Variable Unit Courses

To ease the articulation of variable unit courses, PeopleSoft can determine transfer unit values in one of three ways:

1. By the units of the internal equivalent course as they appear in the course catalog.
2. By a fixed value, determined by the institution.
3. By the units of the incoming course, whether a set or variable value, with the option of setting a maximum limit.

Rather than having the transfer model determine the transfer units for an incoming course based on the units of the internal equivalent course in the course catalog as they appeared at the time the transfer rule was set up, which can cause the system to get out of synchronization, you can determine the units by the internal equivalent course or by a fixed value. See the examples at the end of this section for more information.

Excess Credit Courses

You can award excess credit to a specified course. For example, if a student took MATH1A for 4 units, but the internal equivalent was only worth 3 units, you could set up an excess credit course and award the excess units to that course. See the examples at the end of this section for more information.

Note. The PeopleSoft Academic Advisement application will treat the excess credit course as simply another transfer course, bringing in the course ID, grade, and requirement designation as it does for the internal equivalent course. And just like the internal equivalent, the excess credit course will also be coded as “TR” on the degree audit. If your business practice is to use one particular course ID to collect excess credit for a variety of incoming courses, be aware that each instance of the course will appear on the advising report.

Note. The Creating Course Transfer Equivalency Rules section contains functionality that was part of Product Update Issue #110386, which was posted to Customer Connection in January 2003. This functionality is only available in your database if you downloaded this update.

See Also

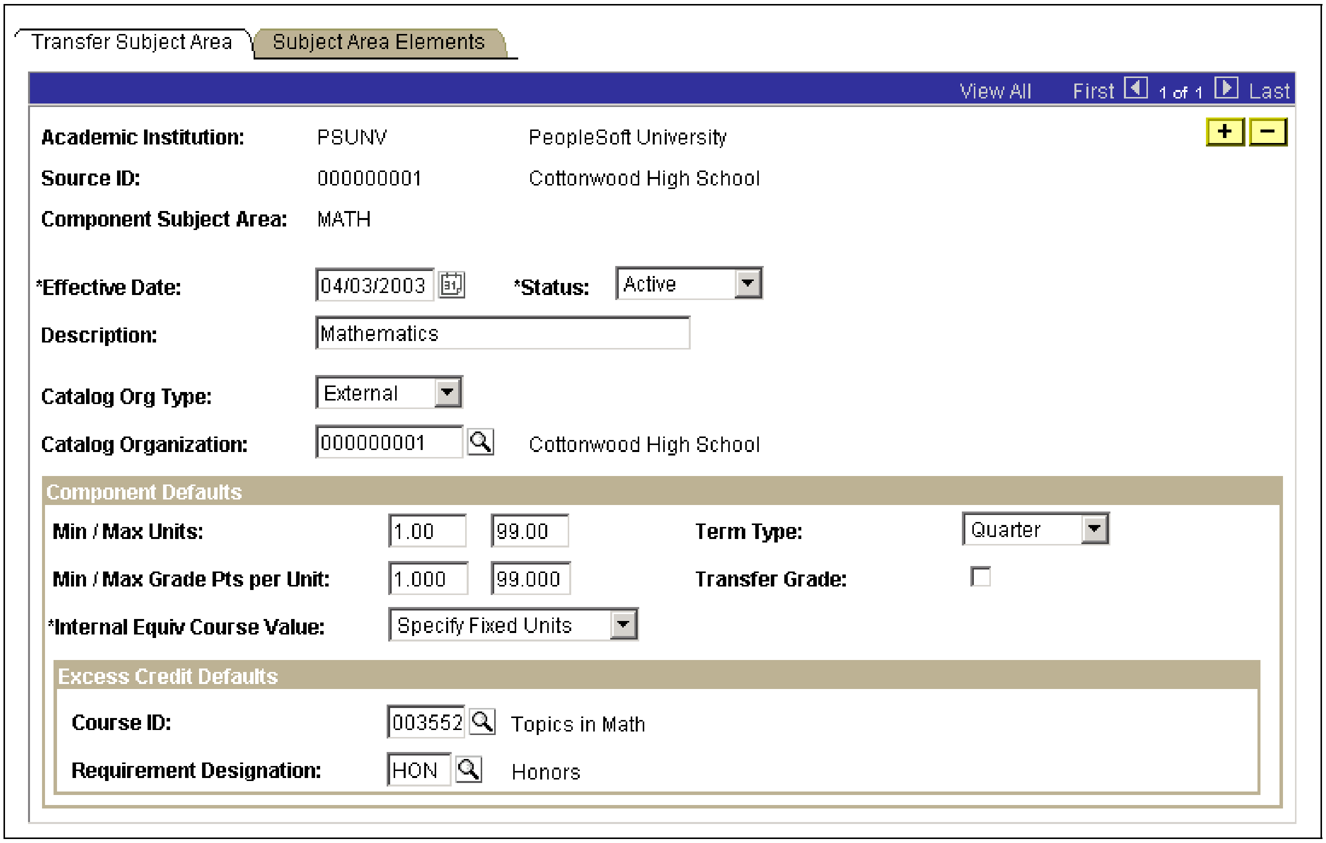
Chapter 29, “Processing Transfer Credit,” page 619

Pages Used to Create Course Transfer Equivalency Rules

Page Name	Object Name	Navigation	Usage
Transfer Subject Area	TRNSFR_SUBJECT	Manage Student Records, Process Transfer Credit, Setup, Transfer Subject Area, Transfer Subject Area	Describe component subject areas for a transfer credit source, otherwise known as an external organization or internal academic institution. Also use this page to set up incoming course default information for the transfer components that you will define within this component subject area. The system applies these defaults to each incoming course that you specify on the Subject Area Elements page of this component.
Subject Area Elements	TRNSFR_DETAIL	Manage Student Records, Process Transfer Credit, Setup, Transfer Subject Area, Subject Area Elements	Define the transfer components of the component subject area.
Incoming Course Information	TRNSFR_FR_SEC	Manage Student Records, Process Transfer Credit, Setup, Transfer Subject Area, Subject Area Elements, Incoming Course Information link	Adjust the default information for a particular incoming course within the component subject area. Default information for incoming courses of a particular component subject area is defined on the Transfer Subject Area page.
Course Transfer Rules	TRNSFR_RULE	Manage Student Records, Process Transfer Credit, Setup, Course Transfer Rules	Define course transfer equivalency rules for external organizations or internal academic institutions.

Defining Component Subject Areas

Access the Transfer Subject Area page.



Transfer Subject Area page

General Fields

Catalog Org Type (catalog organization type)

Designates the table from which you will be selecting a catalog organization for the component subject area of the specified source.

External: The system prompts you with external organizations in your system. Define external organizations on the Organization Table page.

Internal: The system prompts you with academic institutions in your system. Define academic institutions on the Academic Institution Table page.

Catalog Organization

Select the catalog organization for this component subject area of the specified source. By default, the system selects the specified source as the catalog organization, but you can override this value. The system prompts you with values based on your selection in the Catalog Org Type field. When defining course equivalencies for the component subject area of the specified source on the Subject Area Elements page, the system will prompt you with incoming courses based on the catalog organization that you select here.

You can use any external organization or internal academic institution as the catalog organization to define course equivalencies for this component subject area of the specified source. However, once you define a course equivalency on the Subject Area Elements page, the Catalog Org Type and Catalog Organization fields become unavailable.

Component Defaults

Use the fields in the Component Defaults group box to define default information for incoming courses that you select for this component subject area of specified source on the Subject Area Elements page. You can later override these default values for an individual incoming course by selecting the Incoming Course Information link for the incoming course to change on the Subject Area Elements page.

Min/Max Units (minimum and maximum units) — Enter the default minimum and maximum units for all incoming courses that you define for this component subject area of the specified source.

Term Type — Select the default term type for all incoming courses that you define for this component subject area of the specified source. By default the system displays the term type defined on the School Data page of the External Organization component. Values for this field are delivered with your system as translate values. You can modify these values.

Min/Max Grade Pts Per Unit (minimum and maximum grade points per unit) — Enter the default minimum and maximum grade points per unit for all incoming courses that you define for this component subject area of the specified source.

Transfer Grade — Select if you generally want to transfer the grade from the incoming course to the student's record at your academic institution.

If you select this check box, the Transfer Credit process copies the grade from the incoming course to the equivalent course as long as the grade is a valid value for the grading scheme and grading basis of the student's academic program.

If you clear this check box, the Transfer Credit process *always* uses the transfer grade value defined on the Academic Program Table component for the academic program specified on the transfer credit model.

Internal Equiv Course Value (internal equivalent course value) — Select a default for this component subject area. Choose from the following options:

Use Catalog Units: The system determines the number of units the student will get for the incoming course based on the unit setting for the internal equivalent course in the course catalog.

Specify Maximum Units: The system uses the units of the incoming course but will not exceed the maximum units that you enter in the Max Units to Transfer field.

Specify Fixed Units: The system awards the student the number of units that you enter in the Units field.

Excess Credit Defaults

Course ID — If you want to create excess credit courses, select a default for this component subject area. The system places excess units into this course when a student has taken more units for the incoming course than is allowed in the internal equivalent course. See the Course ID field description under the Subject Area Elements page.

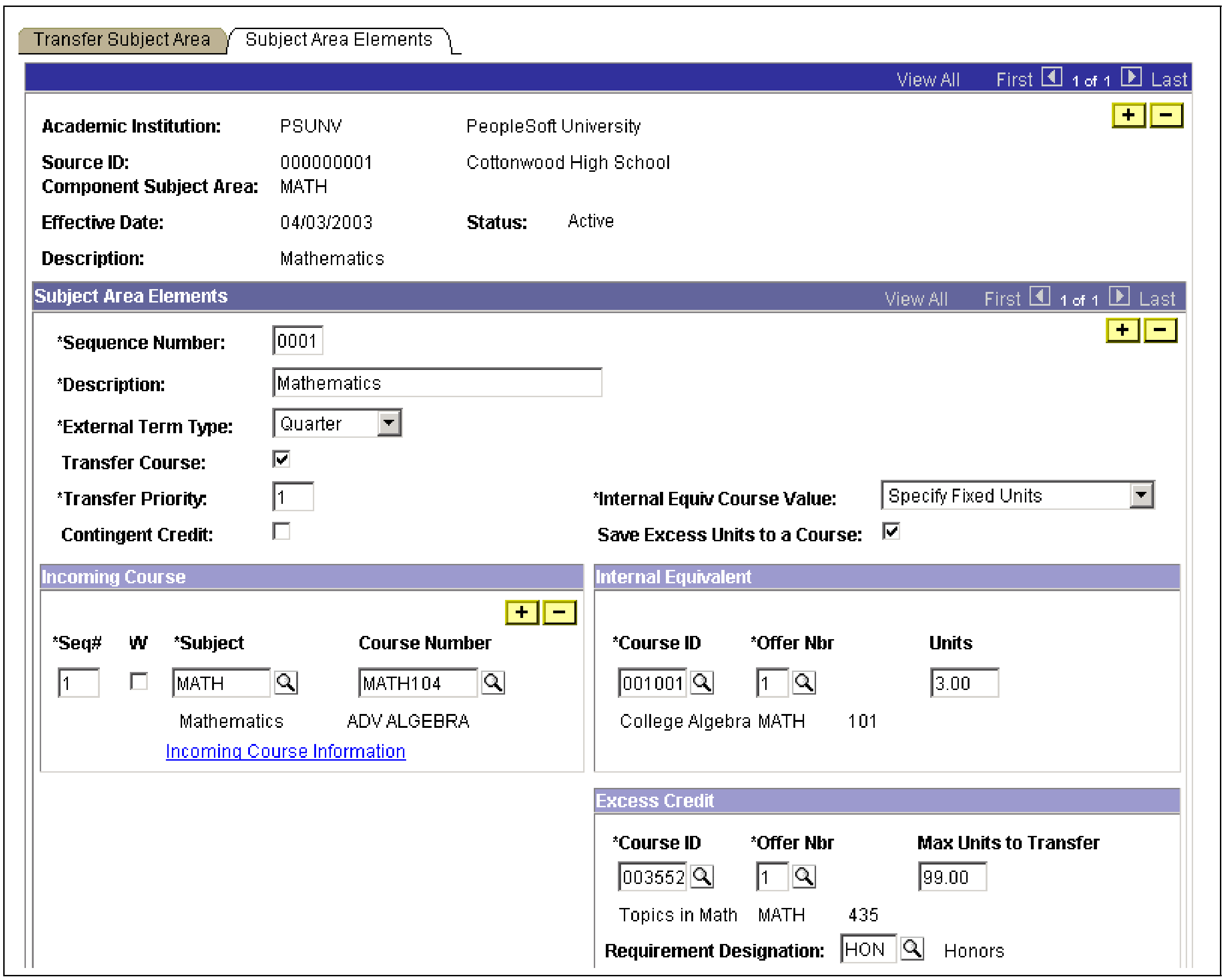
Requirement Designation If you want to assign a requirement designation to your excess credit courses, select a default for this component subject area. Requirement designations further define the type of transfer credit being received. Requirement designation values are defined on the Requirement Designation Table page.

See Also

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 22

Defining Subject Area Elements

Access the Subject Area Elements page.



Subject Area Elements page

Within each transfer component you define the incoming courses and internal equivalent courses. For each transfer component, you define the external term type of the incoming course, the transfer priority in relation to other transfer components within the component subject area, and some general information.

General Fields

Sequence Number

The sequence number is the numeric counter that distinguishes each transfer component of the component subject area apart from other transfer components. By default, the system populates the first sequence number of the component subject area as *0001* and increases the number by one as you add transfer components.

Description

This field describes the transfer component of the component subject area. By default, the system displays the description from the Transfer Subject Area page. You can override this default value.

External Term Type

Select the external term type for this transfer component of the component subject area. By default the system displays the external term type from the Transfer Subject Area page. Values for this field are delivered with your system as translate values. You can modify these values.

Transfer Course

Select to have the incoming courses on this transfer component of the component subject area transfer to your academic institution, provided that the student's incoming course meets all conditions of the course transfer rule.

Clear to have the Transfer Credit process reject the incoming courses that you enter on this row of the component subject area. A course evaluated in this way will have a status of *rejected* on the Transfer Course Details page of the Course Credits component.

Transfer Priority

Enter the transfer priority number for this transfer component. The Transfer Credit process evaluates the courses within the component subject area according to the transfer priority of each transfer component. The transfer component that has the highest priority takes precedence. If an individual's incoming course meets all conditions of the course transfer rule to which this component subject area is assigned, then the Transfer Credit process uses the equivalent course as defined on the transfer component that has the highest transfer priority. However, if the individual's incoming course does not meet the conditions of the course transfer rule to which this component subject area is assigned, the Transfer Credit process evaluates the incoming course against the transfer component with the next highest transfer priority.

For example, if you have a rule where a student can receive credit based on the grade or the number of units the student completes, you set up two separate components using a different transfer priority for each. If a student takes math 101 for 2 units or gets an A, the internal equivalent is Math 102; and if a student takes math 101 for 3 units or gets a C, the internal equivalent is Math 99.

Contingent Credit

Select to have the incoming courses transfer to your academic institution as contingent credit, provided that the individual's incoming course meets all conditions of the course transfer rule to which this component subject area is assigned. A course evaluated in this way will have a status of *contingent* on the Transfer Course Details page of the Course Credits component. You can manually change the status of the incoming course from *contingent* to *accepted* once the individual meets the contingency.

For example, Education 310 at UC Santa Cruz is equivalent to Education 312 at PSUNV, provided that the student also has submitted verification of an internship. Select the Contingent Credit check box for this incoming course. During the Transfer Credit process the course credit will transfer, but the incoming course will have a status of *contingent* on the Transfer Course Details page.

Internal Equiv Course Value (internal equivalent course value)

Select how you want the system to determine the number of units the student will receive from the incoming course. Choose from the following:

Use Catalog Unit: The system determines the number of units the student will get for the incoming course based on the unit setting for the internal equivalent course in the course catalog. To determine the units in the course catalog, the system compares the start date of the articulation term to the effective date in the course catalog.

Specify Maximum Units. The system uses the units of the incoming course but will not exceed the maximum units that you enter in the Max Units to Transfer field, which appears in the Internal Equivalent group box when you select this option. For instance, if the incoming course is a variable unit course, and you want to limit the number of units that will transfer, select this option and enter the maximum units that you want to transfer in the Max Units to Transfer field. If you don’t want to impose a maximum, but still want the system to use the units of the incoming course, you would simply accept the default of 99 in the Max Units to Transfer field.

Specify Fixed Units. The system uses the number of units that you enter in the Units field, which appears in the Internal Equivalent group box when you select this option. By default, the system populates the Units field with the course catalog unit value of the internal equivalent when the transfer rule is set up. You can change this value.

Note. If the unit value or effective date in the course catalog changes, the Units field on this page does not change.

Save Excess Units to a Course

Select if you want to save excess units from the incoming course to a specified internal course. For example, if the incoming course was taken for 4 units, and the internal equivalent course is worth only 3 units, the extra unit can be credited to a second internal course, most likely an elective course.

Note. Only one excess unit course can be assigned per transfer equivalency rule. Also, you cannot save excess units to a course when there is more than one internal equivalent.

Incoming Course

Use the Incoming Course group box to define the external course information for a specific transfer component. The incoming courses and internal equivalent courses that you define are the transfer components of the component subject area.

Seq# (sequence number) — The system automatically assigns a sequential number to each incoming course to identify unique transfer component records within the data table. These sequence numbers have no programming significance.

W (wildcard) — Select to use the # wildcard character at the end of the *Course Number* field value for the incoming course. Clear this check box and the system requires you to use a complete course number.

Subject — Select the subject area of the incoming course. For incoming courses from external organizations, define subject values on the School Subject Maintenance page. For incoming courses from internal academic institutions, subject areas are tied to courses in that academic institution's course catalog.

Course Number — Select the course number for the incoming course. If you are using an external organization for the catalog organization (as defined on the Transfer Subject Area page), the system prompts you with courses that you associated with the external organization on the School Course Classification page. If you are using an internal academic institution for the catalog organization, the system prompts you with courses defined for that academic institution in the Course Catalog component.

If you have selected the W check box, you can substitute the # wildcard character for the last character of the course number so that you can map a series of incoming courses to one internal equivalent course. For example, you can enter *1#* to map course numbers 10 through 19 to a specific internal equivalent course, you can enter *10#* to map course numbers 100 through 109 to specific internal equivalent course. Otherwise, the system prompts you with values from the School Course Classification Table page.

Incoming Course Information — Click to access the Incoming Course Information page, where you can enter detail information about this incoming course.

Internal Equivalent

Use the Internal Equivalent group box to define the internal course that is equivalent to the incoming course for this transfer component.

Course ID — Select the course that is equivalent to the incoming course for this transfer component. The system prompts you to select a course from your academic institution's course catalog.

Offer Nbr (offering number) — By default, the system displays the offering number of the course that you selected according to the definition of that course in your academic institution's course catalog. You can override this default value.

Max Units to Transfer — This field appears when you select Specify Maximum Units in the Internal Equiv Course Value field. Enter the maximum number of units a student can transfer for this incoming course. For example, if the incoming course is a variable unit course that can be taken for 1 to 5 units, and you want the system to use the incoming units to populate the internal equivalent units but you only want to accept up to 3 units for this course, you could enter 3 in this field. However, if you want the system to use the units of the incoming course but don't want to impose a maximum, simply accept the default of 99.

Units

This field appears when you select Specify Fixed Units in the Internal Equiv Course Value field. Enter the number of units that you want the internal equivalent to be worth, regardless of the number of units the incoming course is worth. For example, if you enter 3 in this field, a student could take the course for 1 unit, 2 units, or 7 units, but he would still receive 3 units for the internal equivalent. Although the system displays by default the units of the internal equivalent course as specified in the course catalog, you can change this value. This value does not change when the units are changed in the course catalog.

Excess Credit Group Box

This group box appears when you select the Save Excess Units to a Course check box.

Course ID field

Select an excess credit course for this transfer equivalency rule. If a student earns more units for an incoming course than the internal equivalency rule allows, the system awards the student units in the course you select here. The course should be an elective course for which repeat checking is not activated.

Note. Each time a student is awarded excess units in a course it is shown as a separate instance of the class. Therefore, you should select the Repeat for Credit check box on the Catalog Data page in the course catalog for the course you select. Also, you should set the Units Allowed for the course to 999 and the Total Completions Allowed to 99 on the Catalog Data page.

Offer Nbr (offer number)

By default, the system displays the offering number of the course that you selected according to the definition of that course in your academic institution's course catalog. You can override this value.

Max Units to Transfer (maximum units to transfer)

Enter the maximum number of excess units that you want to award students. If you don't want to set a maximum, simply accept the default value of 99.

Requirement Designation

Enter a requirement designation if you want to define the type of transfer credit being received. This value appears as a default from the course catalog.

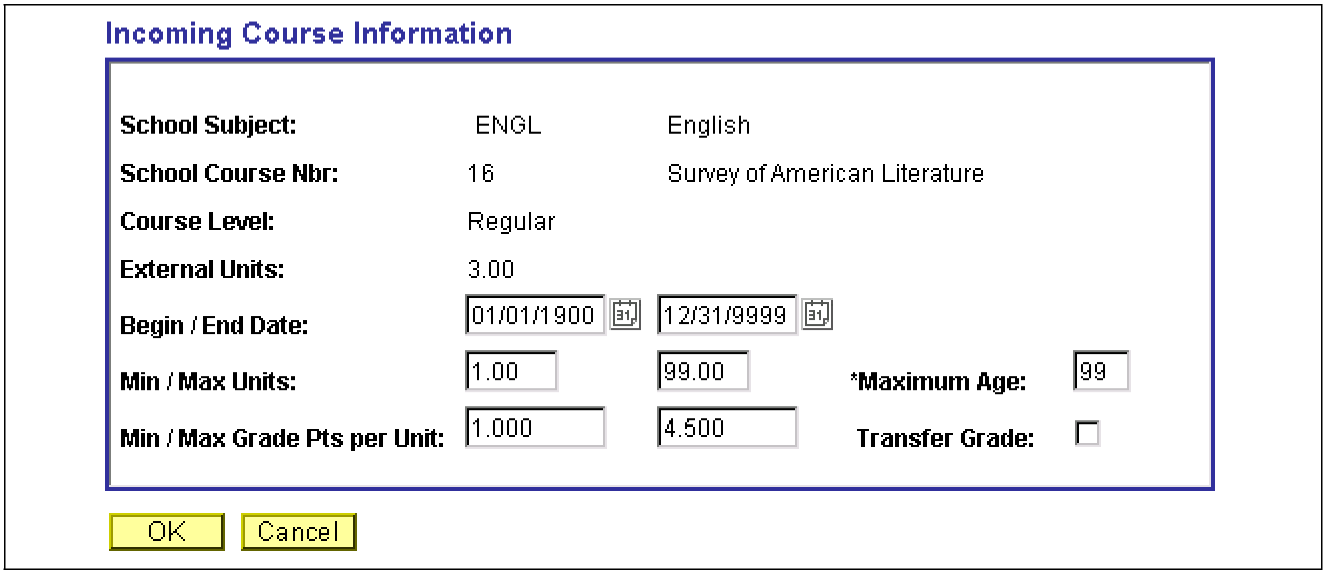
See Also

Chapter 4, "Setting Up the Course Catalog," Defining Course Catalog Data, page 67

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 22

Reviewing and Adjusting Incoming Course Information

Access the Incoming Course Information page.



Incoming Course Information page

Begin / End Date

By default, the system populates the begin and end date of the incoming course with *01/01/1900* and *12/31/9999.* You can override these default values. These dates inform the Transfer Credit process when this incoming course is valid for the course transfer equivalency rule to which you attach this component subject area.

Min / Max Units (minimum and maximum units)

The system displays the default minimum and maximum units for incoming courses within this component subject area. You can override these default values.

For instance, you might want to specify the same incoming course twice but differentiate each specification by how many units are earned. In that case, you would specify the same incoming course multiple times but with different minimum and maximum unit ranges.

Min/Max Grade Pts Per Unit (minimum and maximum grade points per unit)

The system displays the default minimum and maximum grade points per unit for incoming courses within this component subject area. You can override these default values.

Maximum Age

This field defines, in years, the maximum age of the incoming course. This prevents an individual from transferring credit for this course into your academic institution when the individual took the course more years ago than the number that you specify here. By default, the system sets the maximum age of an incoming course to *99* years, but you can override this default value. For instance, you might want restrict individuals from receiving transfer credit for a course when an individual has taken the course more than *4* years previous to the date your institution processes that individual's transfer credit.

Transfer Grade

The system displays the default value of this field according to your selection for the corresponding field on the Transfer Subject Area page. Select this check box if you want to transfer the grade from the incoming course to the student's record at your academic institution.

If you select this check box, the Transfer Credit process copies the grade from the incoming course to the equivalent course, provided that the grade is a valid value for the grading scheme and grading basis of the student's academic program. If the grade is not a valid value, then the Transfer Credit process uses the transfer grade value defined on the Basic Data page for the equivalency rule.

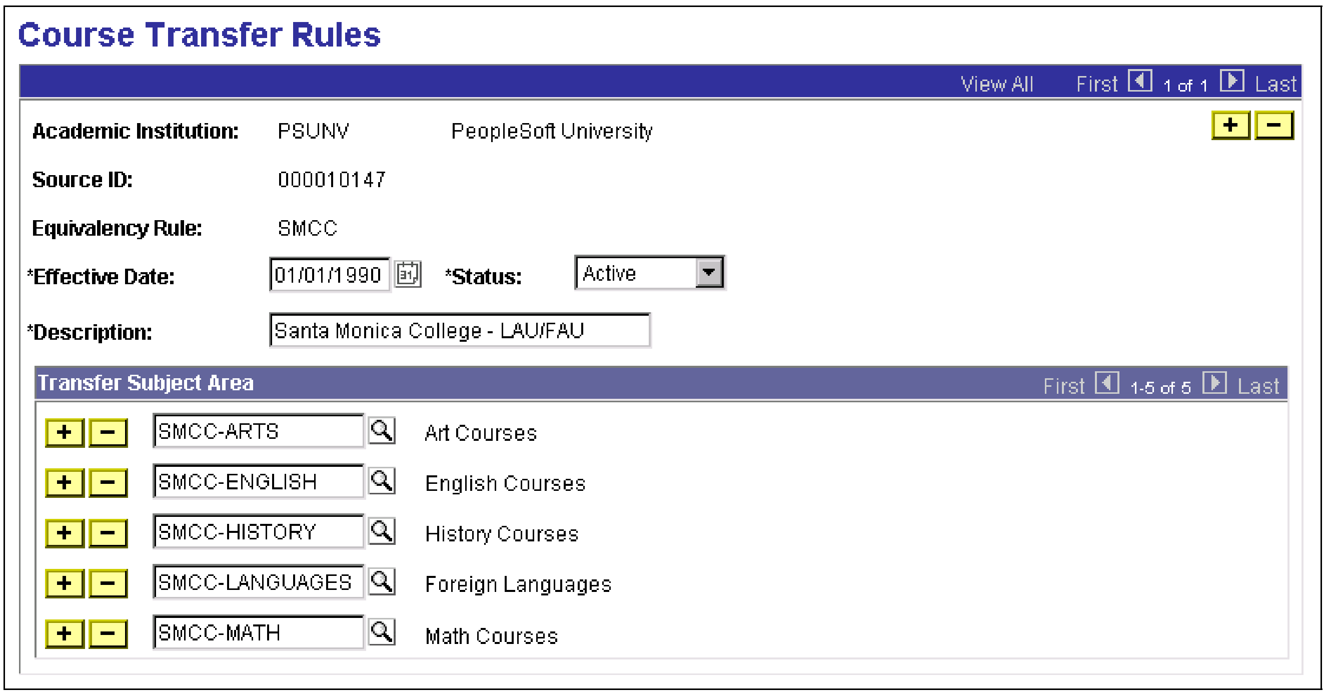
If you clear this check box, the Transfer Credit process *always* uses the transfer grade value defined on the Academic Program Table component for the equivalency rule.

OK Click to save changes and return to the Subject Area Elements page.

Cancel Click to cancel changes and return to the Subject Area Elements page.

Defining Course Transfer Rules

Access the Course Transfer Rules page.



Course Transfer Rules page

For each transfer equivalency rule, attach component subject areas that you have defined for the source in the Transfer Subject Area component. You can define multiple course transfer equivalency rules for a single source. For example, you might define multiple rules to account for academic program and academic plan differences in equivalency rules. The effective date functionality enables you to add and delete component subject areas that are no longer valid for the equivalency rule.

When adding a new transfer equivalency rule, you must also specify the credit source type of either *external organization* or internal academic *institution.* The credit source type instructs the system from which table you will be selecting your source ID. By selecting *external organization,* the system prompts you with the source IDs of external organizations in your system. By selecting *institution,* the system prompts you with source IDs of academic institutions in your system.

Transfer Subject Area Select the component subject areas to tie to the course transfer equivalency rule. Each component subject area defines the incoming courses, their internal equivalent courses, and detail about how the Transfer Credit process must function. The Transfer Credit process uses the transfer component data for component subject areas to determine an individual's transfer credit.

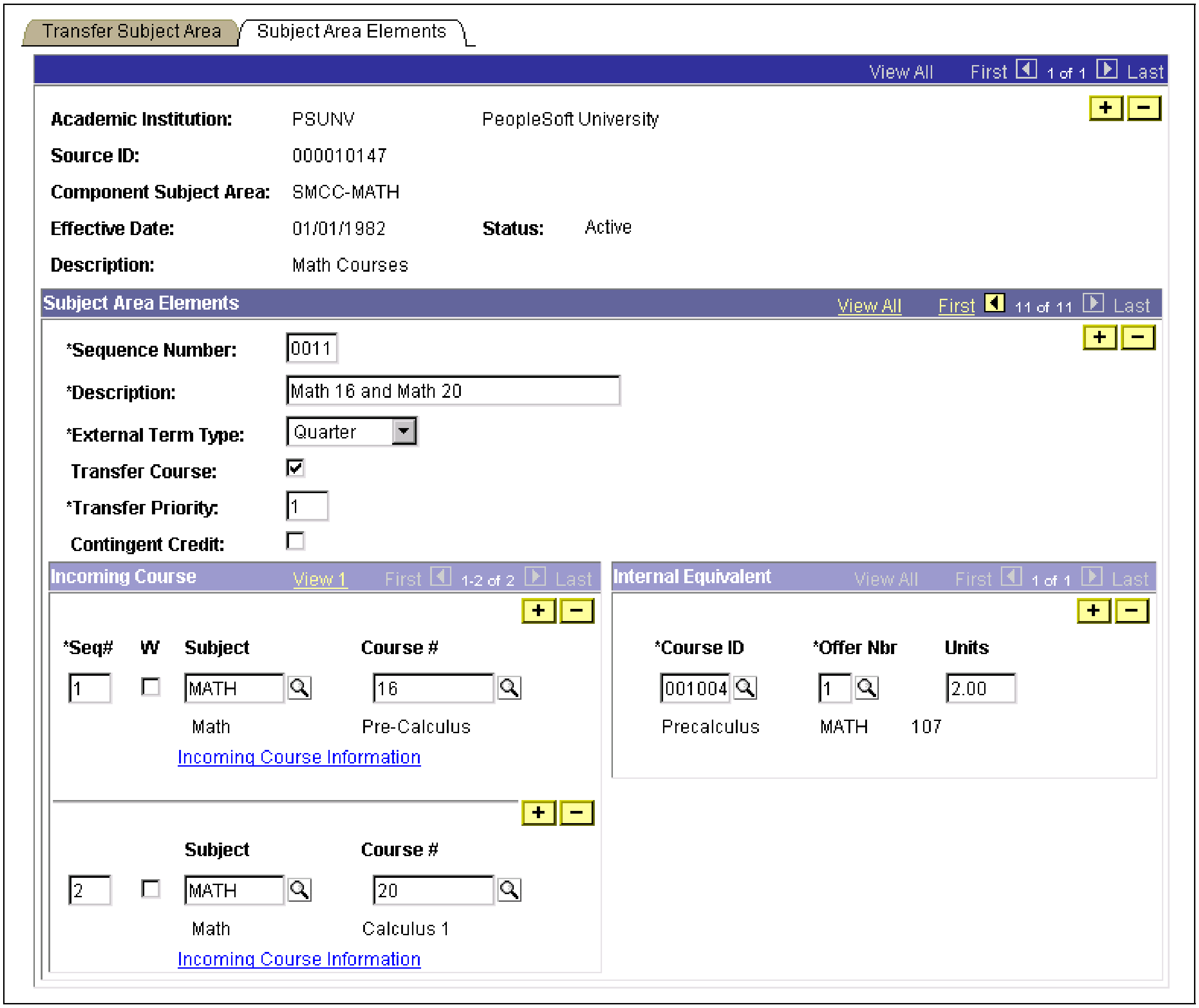
Reviewing Examples of Course Equivalencies

This section discusses examples of the following course equivalencies:

- Many-to-one.
- Many-to-many.
- Course Rejection.
- Multiple Equivalencies for the Same Course.
- Excess credit.
- Historical enrollment statistics.

Reviewing an Example of a Many-to-One Course Equivalency

To create a many-to-one course equivalency, set up your Subject Area Elements page as follows:

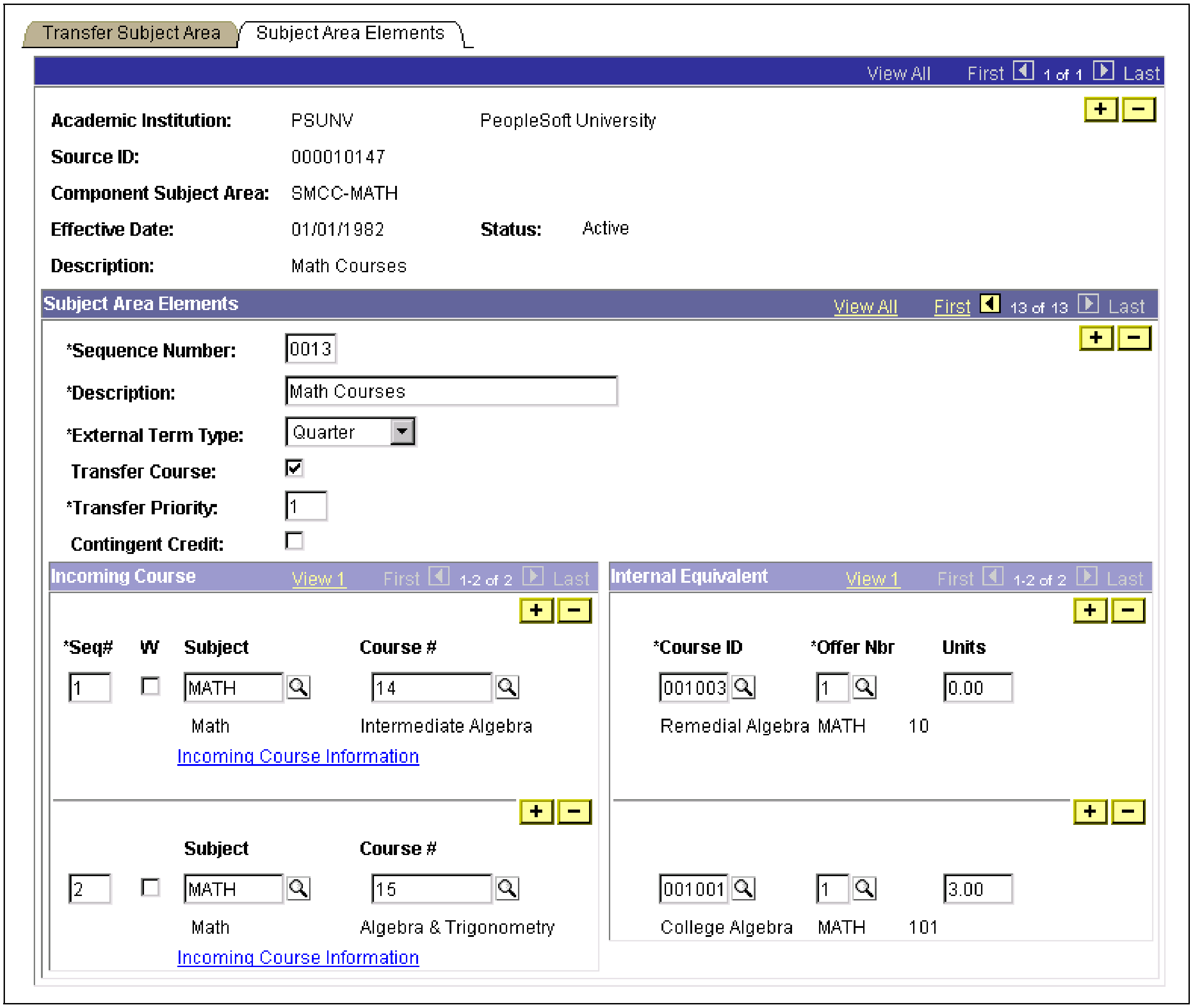


Example of many-to-one course equivalency

In this example, we created a component sequence for the Math Courses component subject area where two external courses are equivalent to one internal course. Notice that this is the eleventh component sequence number within this component subject area.

Reviewing an Example of a Many-to-Many Course Equivalency

To create a many-to-many course equivalency, set up the Subject Area Elements page in the following way:

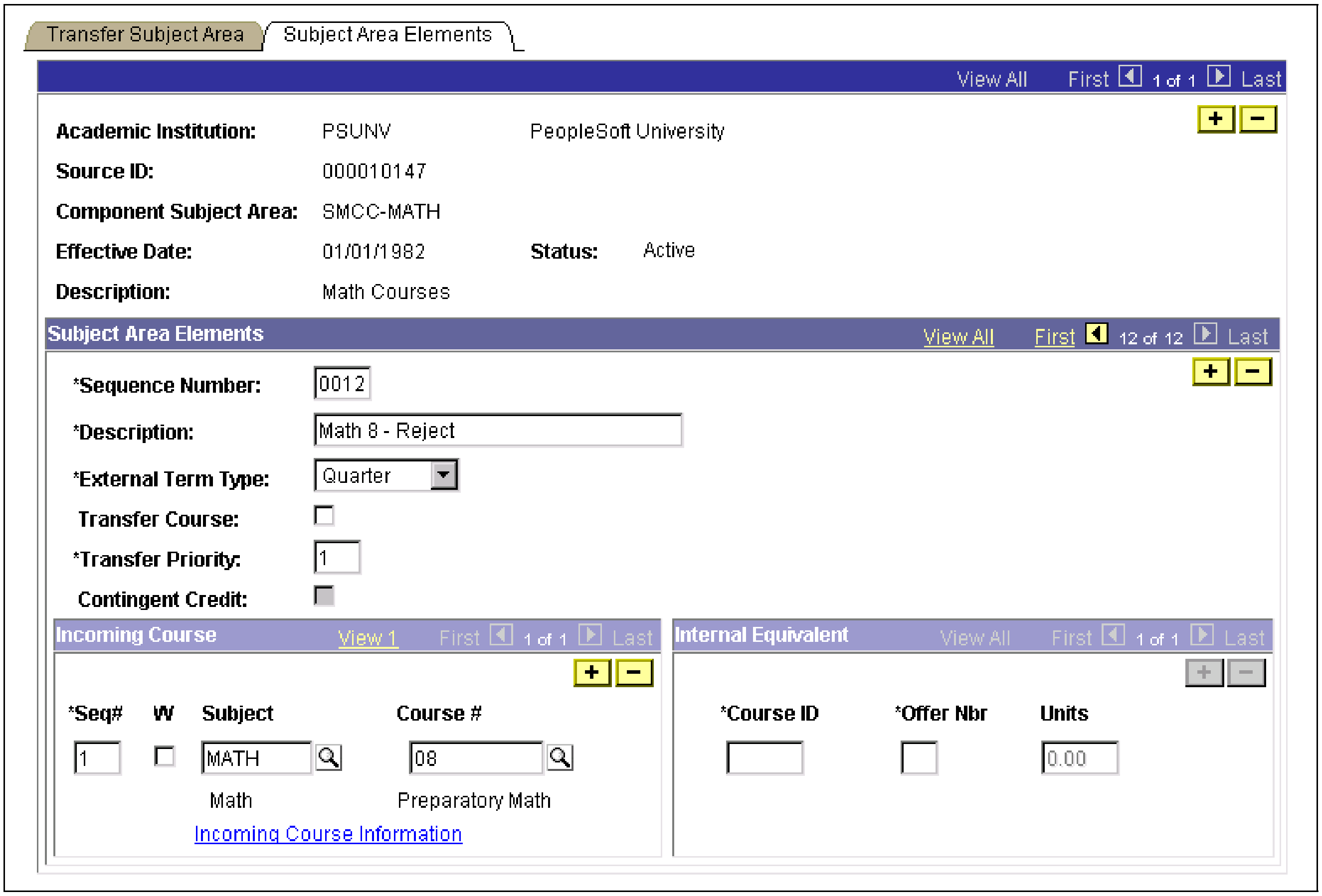


Example of many-to-many course equivalency

In this example, we created a component sequence for the Math Courses component subject area where two external courses are equivalent to two internal courses. This means that the individual must have both incoming courses and will be receive credit for both internal courses.

Reviewing an Example of a Course Rejection Equivalency

To reject a course, set up the Subject Area Elements page in the following way:



Example of rejecting an incoming course

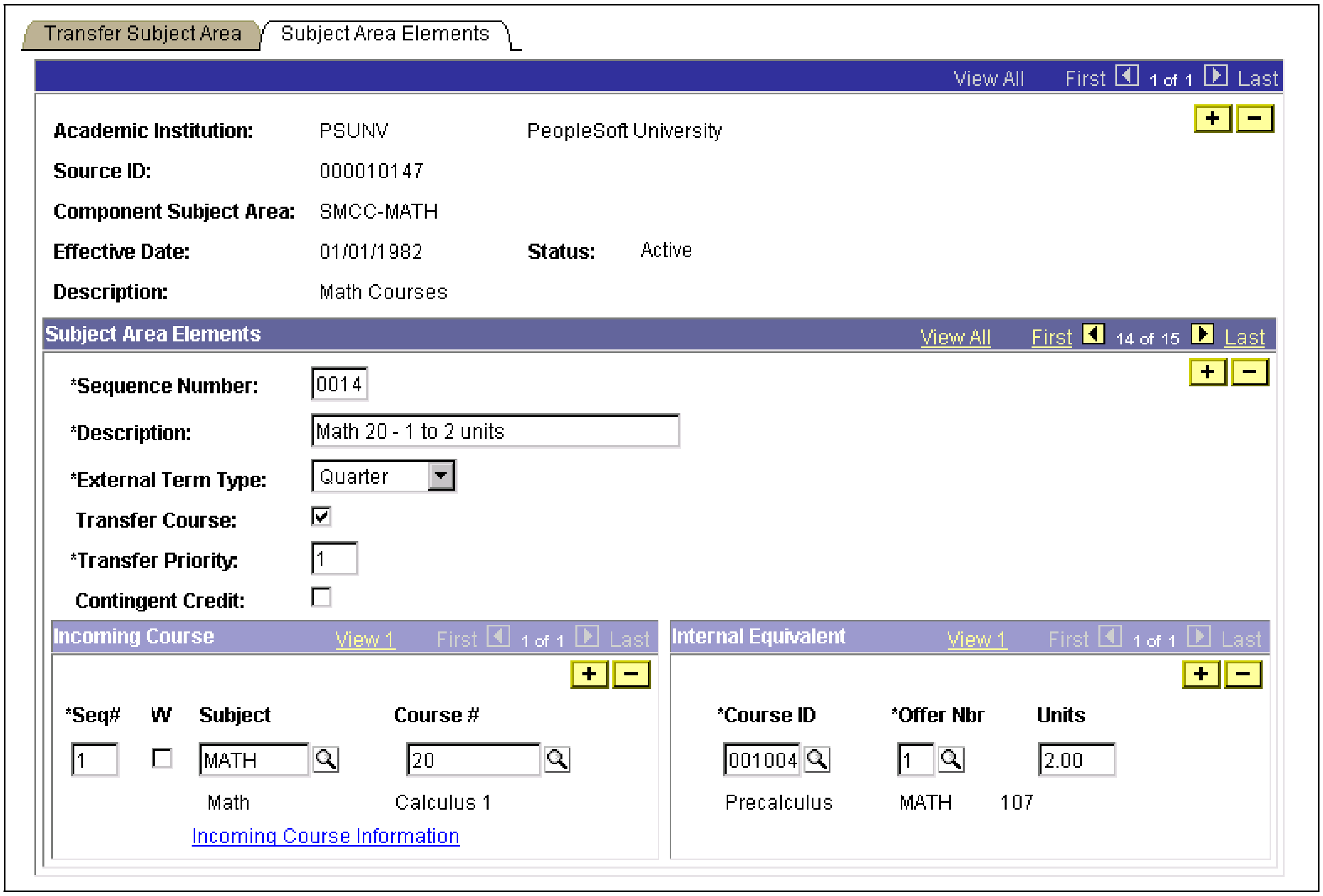
In the previous example, we cleared the Transfer Course check box. This makes the Internal Equivalent fields unavailable.

Reviewing an Example of Multiple Equivalencies for the Same Course

To define multiple equivalencies for the same incoming course, where each component is dependent on the credits earned (or another factor), set up the Subject Area Elements page in a manner similar to the following example.

For Santa Monica City College, the student's transfer course will articulate to different math courses at PSUNV depending on the number of units that a student takes for Math 20. We define two component rules—one for Math 20 taken between one and two units and another for Math 20 taken between three and four units.

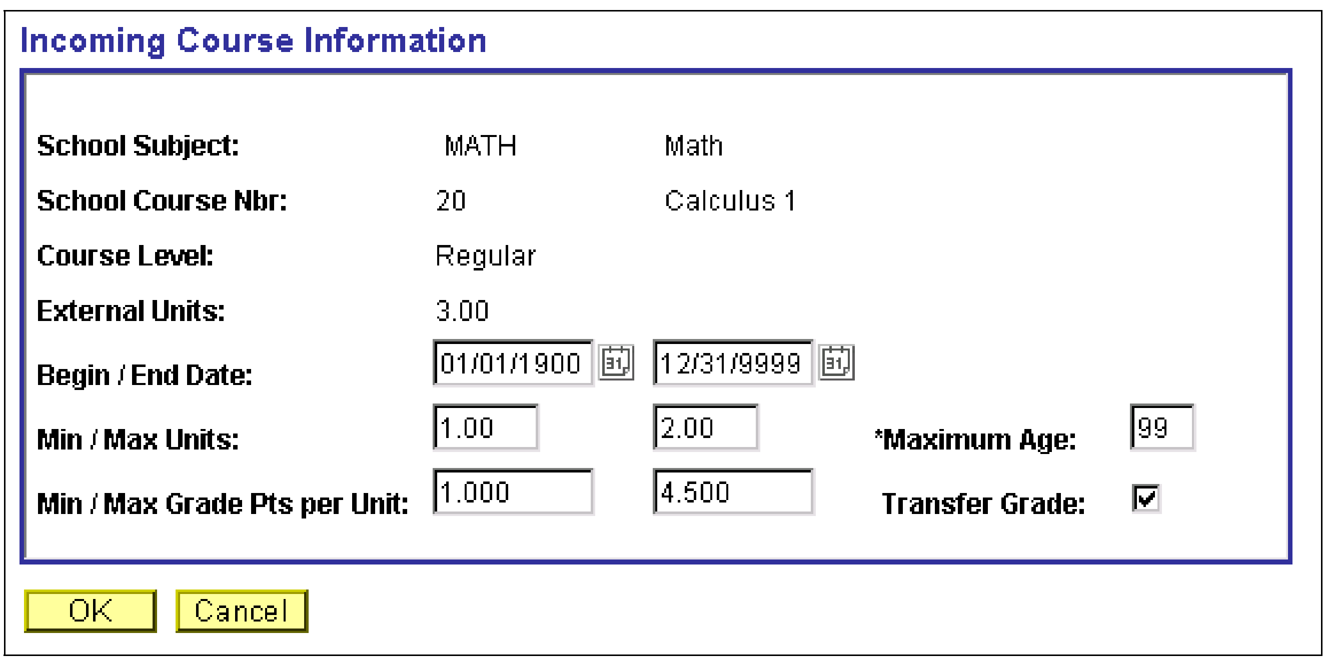
The Subject Area Elements page for the one to two unit equivalency looks as follows:



Example of multiple equivalencies for the same course (1 of 4)

Notice that the incoming course maps to *Pre-calculus.*

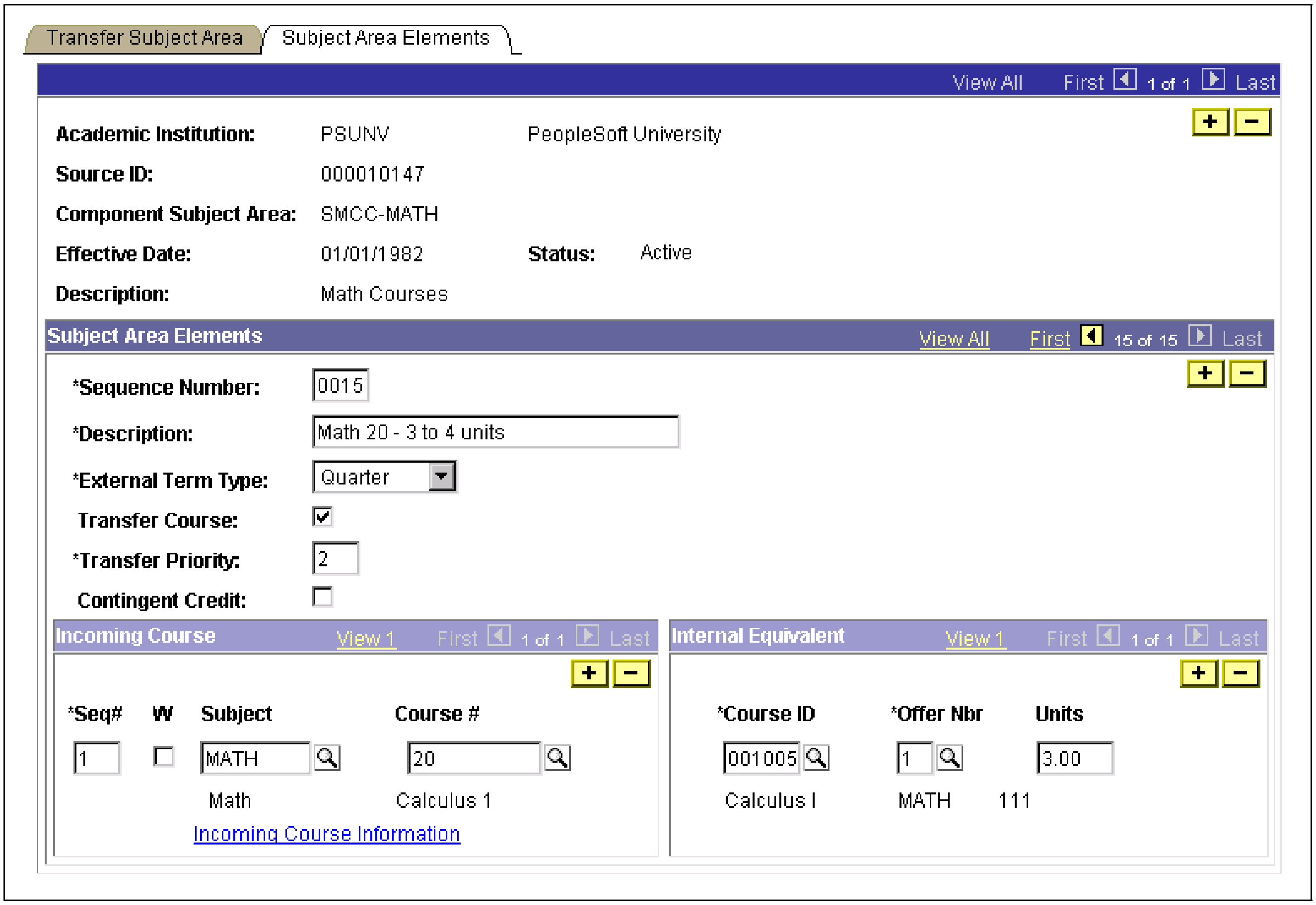
The Incoming Course Information page for the one to two unit equivalency looks as follows:



Example of multiple equivalencies for the same course (2 of 4)

Notice that the minimum and maximum units are *1.00* and *2.00,* respectively.

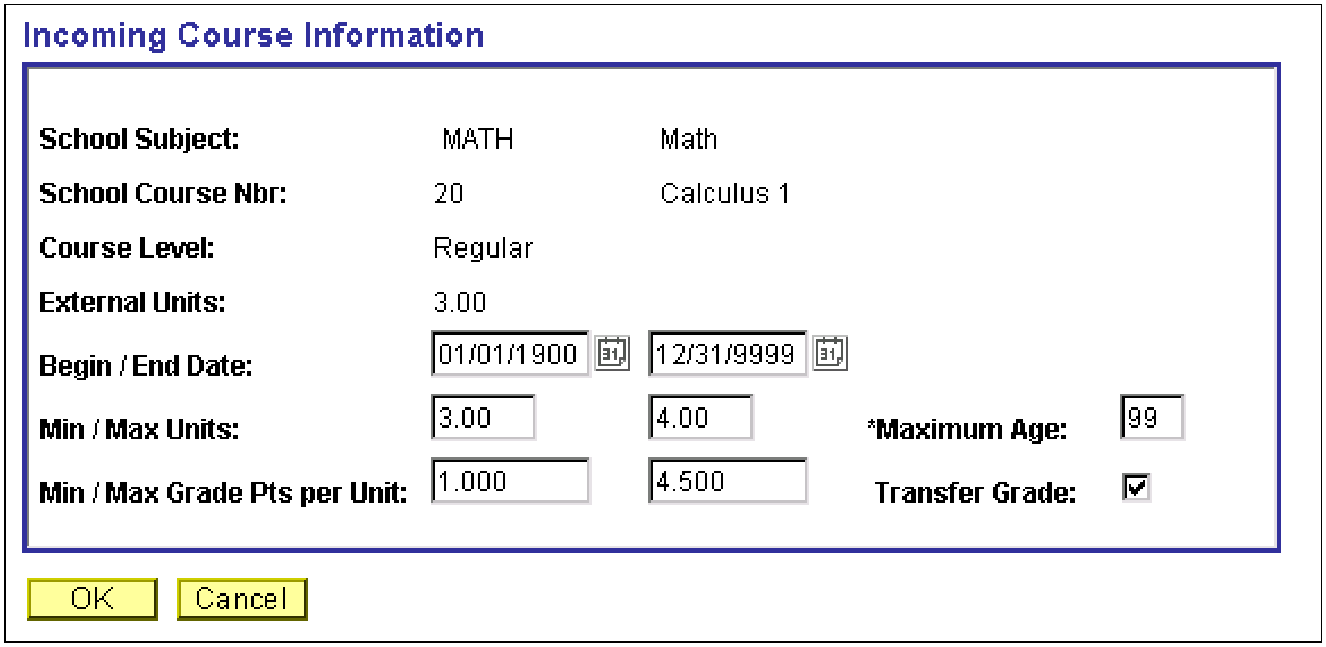
The subject Area Elements page for the three to four unit equivalency looks as follows:



Example of multiple equivalencies for the same course (3 of 4)

Notice that the incoming course maps to a *Calculus 1* instead of *Pre-calculus.*

The Incoming Course Information page for the three to four unit equivalency looks as follows:

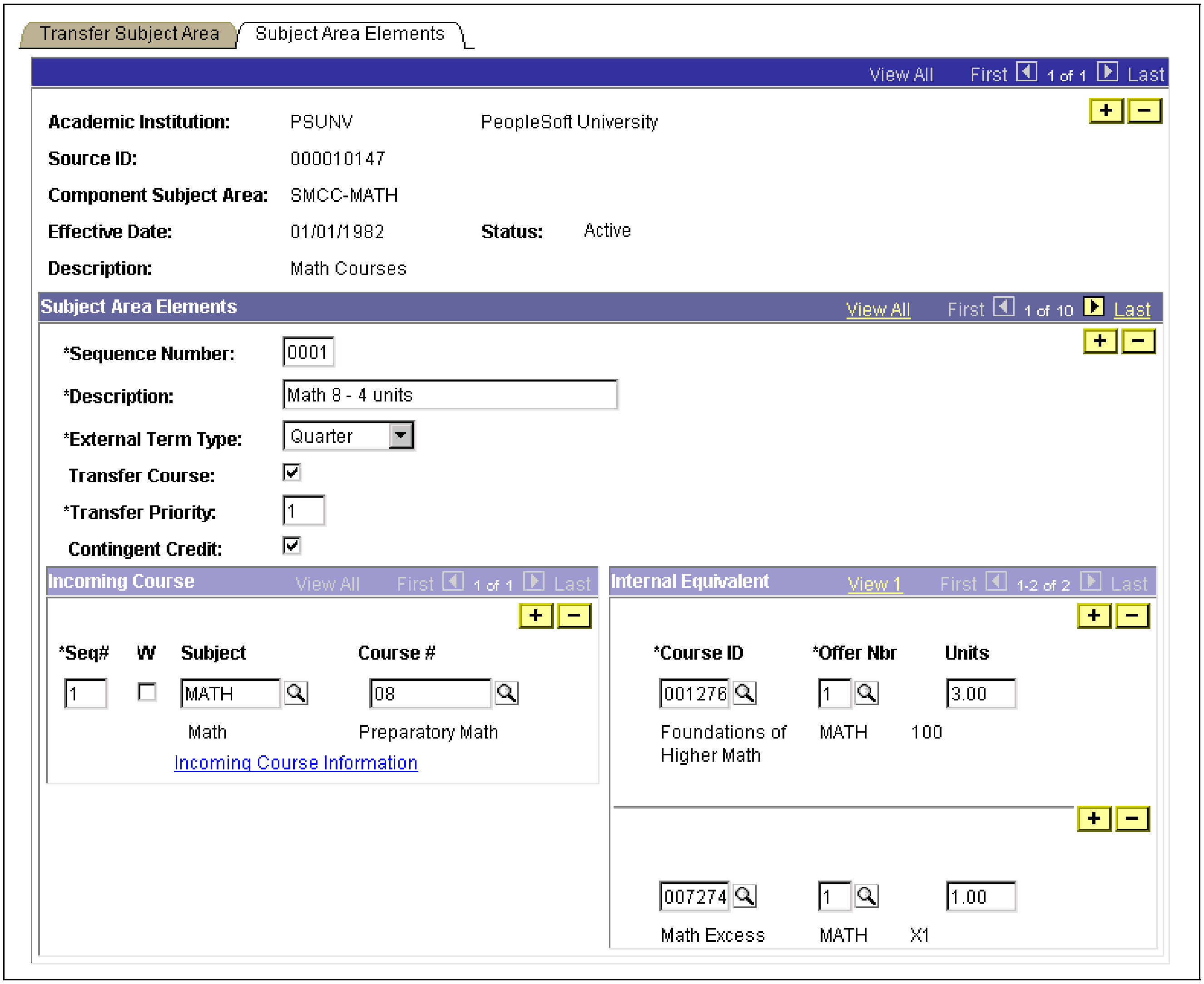


Example of multiple equivalencies for the same course (4 of 4)

Notice that the minimum and maximum units are *3.00* and *4.00,* respectively.

Reviewing an Example of an Excess Credit Course Equivalency

If an external course is worth more units than the internal equivalent course, you have excess credit. First create a special course in the course catalog to handle excess credit for the incoming course, then set up the Subject Area Elements page in the following way:



Example of excess credit

Special courses are also useful for historical conversion purposes when you use the Historical Course Enrollment page.

Reviewing an Example of a Historical Enrollment Statistics Course Equivalency

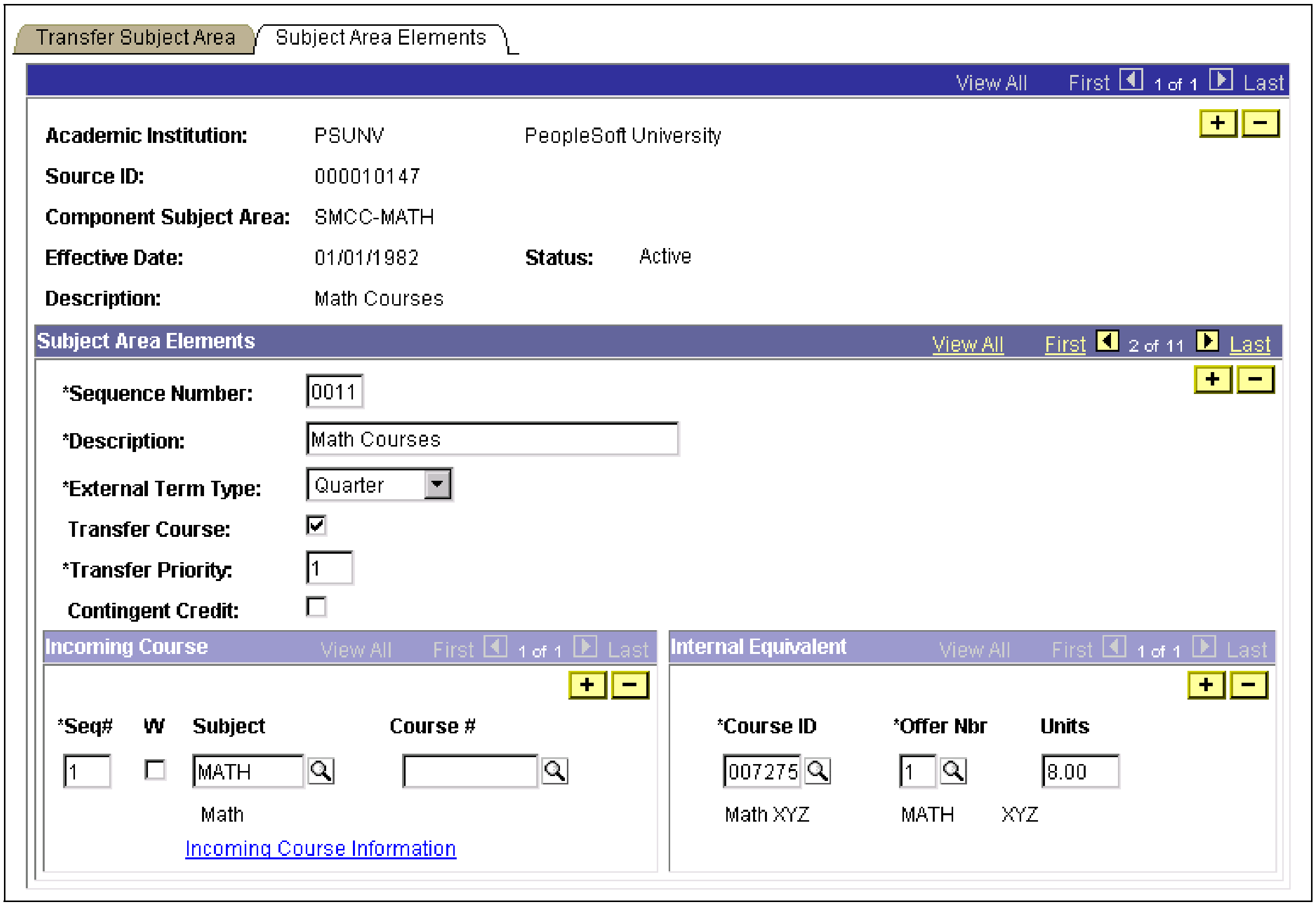
If you are using the Historical Enrollment page in your conversion to PeopleSoft Student Administration, and you want to also convert enrollment statistics for a student, you must use the Transfer Credit process to get statistics onto the student's record.

To transfer statistics using the transfer credit process:

1. Define a special external organization on the Organization Table page.
2. Set the level of detail as *summary* on the Organization Affiliation page's Transfer Credit Transcript Print group box.
3. Define special courses for summary statistics.

4. Define incoming courses and their internal equivalents in the Transfer Subject Area component using the special external organization and courses.
5. Process the transfer credit.

For example, you might decide to define special courses for each subject area, such as Math Courses, and English Courses. You can set up the Subject Area Elements page as follows:



Example of course equivalency for historical data conversion

In this example, the incoming course will be one special course defined on the School Course Classification page, while the internal equivalent is a special course in our course catalog.

Converting Existing Transfer Components Into Component Subject Areas

If you are upgrading your PeopleSoft Student Records system and you have existing transfer component data in your application tables, run the delivered upgrade script, UPG_SR. This upgrade script moves your existing transfer component data from the former application-data table structure into the current application-data table structure. It assigns all transfer components within an existing course transfer equivalency rule to a single component subject area that is named after the original rule in which the transfer component resides. After you run the upgrade script, you can, in the Transfer Subject Area component, access each of the component subject areas that the upgrade script creates, just as you would any other component subject area that you manually define. The data for all component subject areas, regardless of how they have been created, are stored in the same table (EXT_TRNSFR_SUBJECT).

Next, you must go to the Course Transfer Rules page and create your course transfer equivalency rules, attaching the component subject area to rules as appropriate. The system writes course transfer equivalency rule data to the EXT_TRNSFR_RULE_SUBJ table. You can continue course transfer credit processing using predefined rules as usual.

Copying Transfer Components Between Component Subject Areas

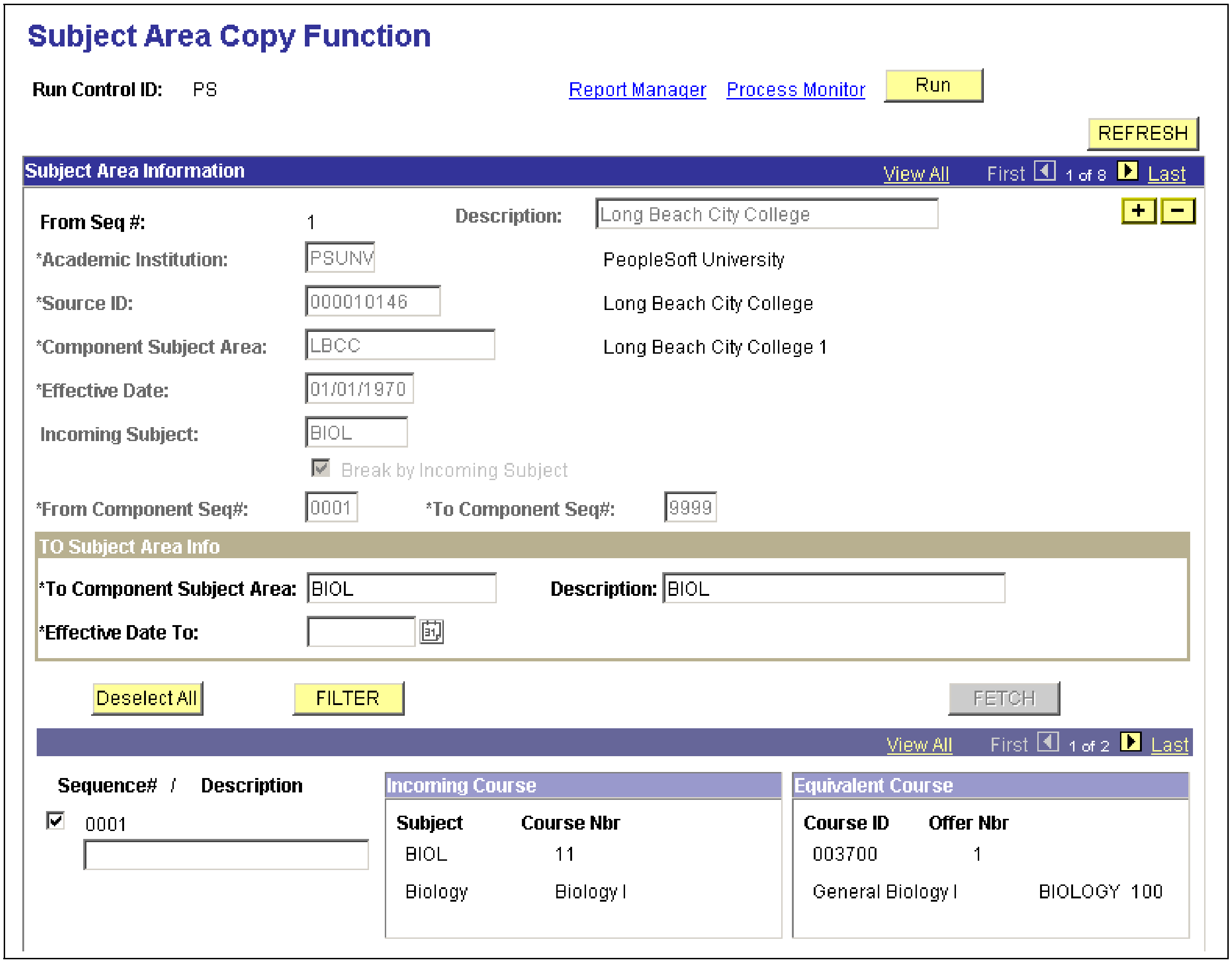
This section discusses how to copy transfer components between component subject areas.

Page Used to Copy Transfer Components Between Component Subject Areas

Page Name	Object Name	Navigation	Usage
Subject Area Copy Function	RUNCNTL_TRNSFR_CPY	Manage Student Records, Process Transfer Credit, Process, Subject Area Copy Function	As necessary and as time permits, copy transfer components from larger, more general component subject areas into new, smaller component subject areas.

Copying Transfer Components

Access the Subject Area Copy Function page.



Subject Area Copy Function page

The copying functionality is intended primarily for academic institutions that receive a large number of transfer credit courses from a single source. On this page, you select the component subject area from which you want to retrieve transfer components, define the basics of the new component subject area to create, then retrieve the transfer components from the existing component subject area, based on your parameters. Sort through the list of results to select the transfer components to include in the new transfer subject area, then run the Transfer Rule Subject Area Copy COBOL/SQL process (SRPCCARX) to create the new, smaller component subject area and copy the selected components into it. After you run the process, you can edit the newly created component subject area in the Transfer Subject Area component. Attach this new component subject area to course transfer equivalency rules in the Course Transfer Rules component and resume course transfer credit processing as usual.

Important! If you are copying a large component subject area, we recommend that you either use the Incoming Subject field or Break by Incoming Subject check box to separate the large component subject area into smaller ones based one incoming subject, or use the From Component Seq# and To Component Seq# fields to copy blocks of 500 transfer components at a time into smaller component subject areas based on transfer component sequence numbers. You are not required to copy transfer components by subject area—this is simply a logical breaking point for large component subject areas.

Refresh Click to refresh the page.

From Seq # (from sequence number) The sequence number is the numeric counter that distinguishes each row of the process request apart from other rows. By default, the system sets the first sequence number to *1* and increases the number by one as you add rows.

Description Enter a description for this row of the process request.

Academic Institution Select the academic institution that the component subject area to copy belongs to.

Source ID Select the identification code of the source that the component subject area to copy belongs to.

Component Subject Area Select the component subject area to copy. The system displays valid choices based on the academic institution and source that you specified for this process request.

Effective Date Select the effective date of the specified component subject area. The effective date indicates the row to copy within the specified component subject area.

Incoming Subject Select an incoming subject to filter by subject through all transfer components of the specified transfer component subject area. When you click the Fetch button the system retrieves only the transfer components with this incoming subject and automatically selects to copy them into the new, smaller component subject area during processing. This field prompts against the external subject table for the specified external organization. If you use this field, the Break by Incoming Subject check box becomes unavailable for entry. Note that you can assign the To Component Subject Area field and its related Description field the same name as the incoming subject because component subject areas are keyed by source ID. Or, you can assign these fields unique values. (Optional)

Break by Incoming Subject Select to break by incoming subject all transfer components of the specified component subject area. If you select this check box, the Incoming Subject field, To Component Subject Area field, and its related Description field become unavailable for entry.

When you click the Fetch button the system retrieves all transfer components, separates them by incoming subject into unique rows on the run control page, assigns each row a sequence number, and automatically selects to copy all transfer components into new, smaller component subject areas during processing. For example, LBCC has eight different incoming subjects in their component subject area, so the system creates eight rows for eight new component subject areas. In addition, the system automatically populates the Incoming Subject field, the To Incoming Subject Area field, and its related Description field for each row. The Incoming Subject field remains unavailable for edit, but you can edit the other two fields. (Optional)

From Component Seq# (from component sequence number) Indicate the first transfer component to retrieve from the specified component subject area. By default, the system sets the value of this field to *0001*. You can override this default value.

To Component Seq# (to component sequence number)	Indicate the last transfer component to retrieve from the specified component subject area. When you click the Fetch button to retrieve transfer components, the system displays all transfer components within the specified range. By default, the system sets the value of this field to *9999*. You can override this default value.
To Component Subject Area	Enter the identification code of the new component subject area to create based on the preexisting component subject area that you have specified.
Description	Enter a description of the new component subject area.
Effective Date To	Enter the effective date of the new component subject area to create based on the preexisting component subject area that you specified to copy.
Fetch	Click to retrieve the transfer components from the preexisting component subject area that you specified to copy.
Sequence # (sequence number)	The system displays the sequence number of the transfer component from the preexisting component subject area that you specified to copy.
Description	The system displays the description of the transfer component from the preexisting component subject area that you specified to copy.
Incoming Course	The system displays the subject, course number, and description for the incoming course of the transfer component.
Equivalent Course	The system displays the course ID, offering number, and description for the internal equivalent course of the transfer component.
Select All or **Deselect All**	Click to select or deselect all of the transfer components in the list at the bottom of the page. This functionality is useful when you are splitting a component subject area with a large amount of transfer components. For example, let's say that you have a math component subject area with 300 transfer components and you want to group 250 within a new, higher math component subject area and the remaining 50 within a new, lower math component subject area. To create the higher math component subject area, retrieve all of the transfer components from the math component subject area, click the Select All button, then clear the check boxes for the 50 excluded components. When you create the lower math component subject area, select all of the 50 included transfer components.
Filter	Click to filter the list of transfer components that appear at the bottom of this page. The system displays only the transfer components that you have checked. The checked transfer components are the only ones that the Subject Area Copy Function process uses when creating the new component subject area.
Unfilter	The system displays this button whenever you have filtered the list of transfer components that appear at the bottom of the page. Click this button to reset the list back to its original number of transfer components.

Defining Course Equivalencies for Academic Programs and Plans

After you have set up your course transfer equivalency rules, you must use the Program/Source Equivalency component to select the academic programs and plans within your academic institution to which you want to assign these rules.

If you have multiple equivalency rules for a given external organization or internal academic institution, you can attach these rules to various academic program and academic plan combinations. For instance, if we create two course transfer equivalency rules for an external organization, then we can link one rule to the Liberal Arts program and the other rule to the Liberal Arts program and English plan. The English equivalency rule includes English course-specific equivalencies that are different from the liberal arts equivalencies.

Note. The Basic page enables you to attach course transfer equivalency rules to a specific academic program or academic plan. The system requires that you attach the rule to an academic program, but it is optional whether you attach the rule to an academic plan.

This section discusses how to:

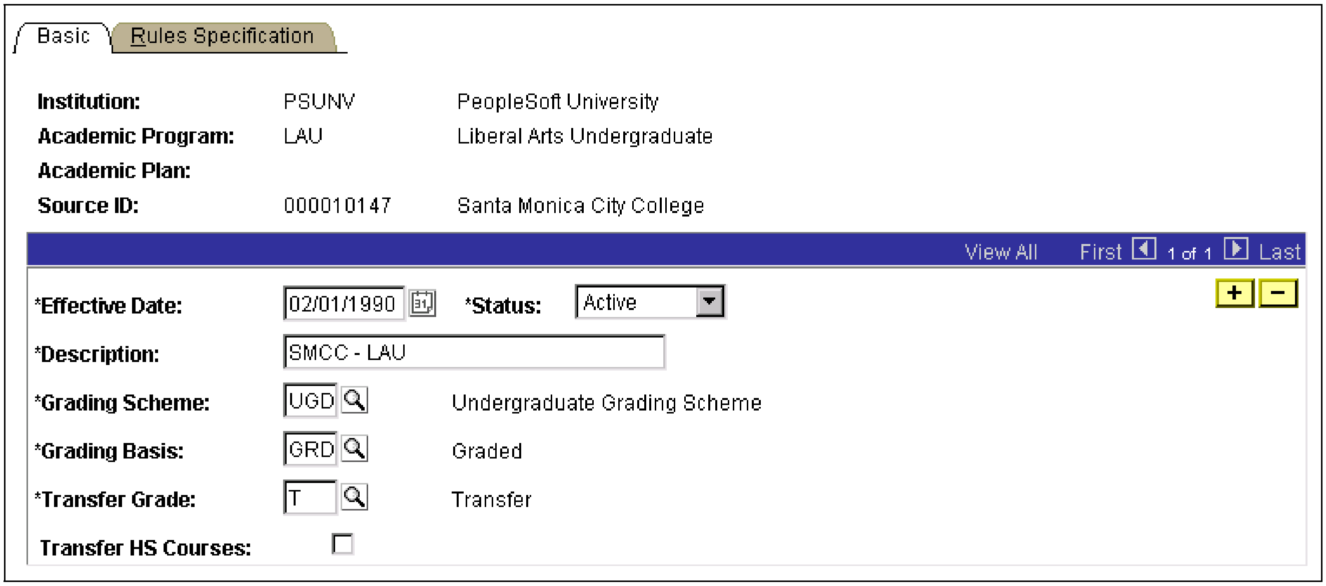
- Set up basic academic program and plan data.
- Set equivalency rules.

Pages Used to Define Course Equivalencies for Academic Programs and Plans

Page Name	Object Name	Navigation	Usage
Program/Source Equivalency - Basic	EXT_TRNSFR	Manage Student Records, Process Transfer Credit, Setup, Program/Source Equivalency, Basic	Set up some basic parameters (such as grading basis and transfer grade) for processing transfer credit within a specified academic program or plan.
Rules Specification	EXT_TRNSFR_EQUIV	Manage Student Records, Process Transfer Credit, Setup, Program/Source Equivalency, Rules Specification	Set the course equivalency rules for academic programs or academic plans, which the system will use to evaluate transfer credit from the specified institution. On this page, like the external course catalog, you have the flexibility to point to any organization's ID to use as the source ID for course equivalency rules.

Setting Up Basic Academic Program/Plan Data

Access the Program/Source Equivalency - Basic page.



Program/Source Equivalency - Basic page

When accessing this page in Add mode, select the credit source type from which you will be selecting your source ID. By selecting *external organization,* the system prompts you with the source IDs of external organizations in your system. You define external organizations on the Organization Table page. By selecting *institution,* the system prompts you with source IDs of academic institutions in your system. You define institutions on the Academic Institution Table page.

Effective Date In addition to the common definition of this element, the system uses the effective date in conjunction with the articulation term on the Transfer Course Detail page to determine the validity of equivalency rules.

Grading Scheme By default, the system displays the grading scheme of the specified academic program. Define grading schemes for academic programs on the Program 1 page of the Academic Program Table component. Define grading schemes for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer courses that you process. This grading scheme defines all of the valid grading bases from which you can select a default transfer grade for this academic program/plan and source combination.

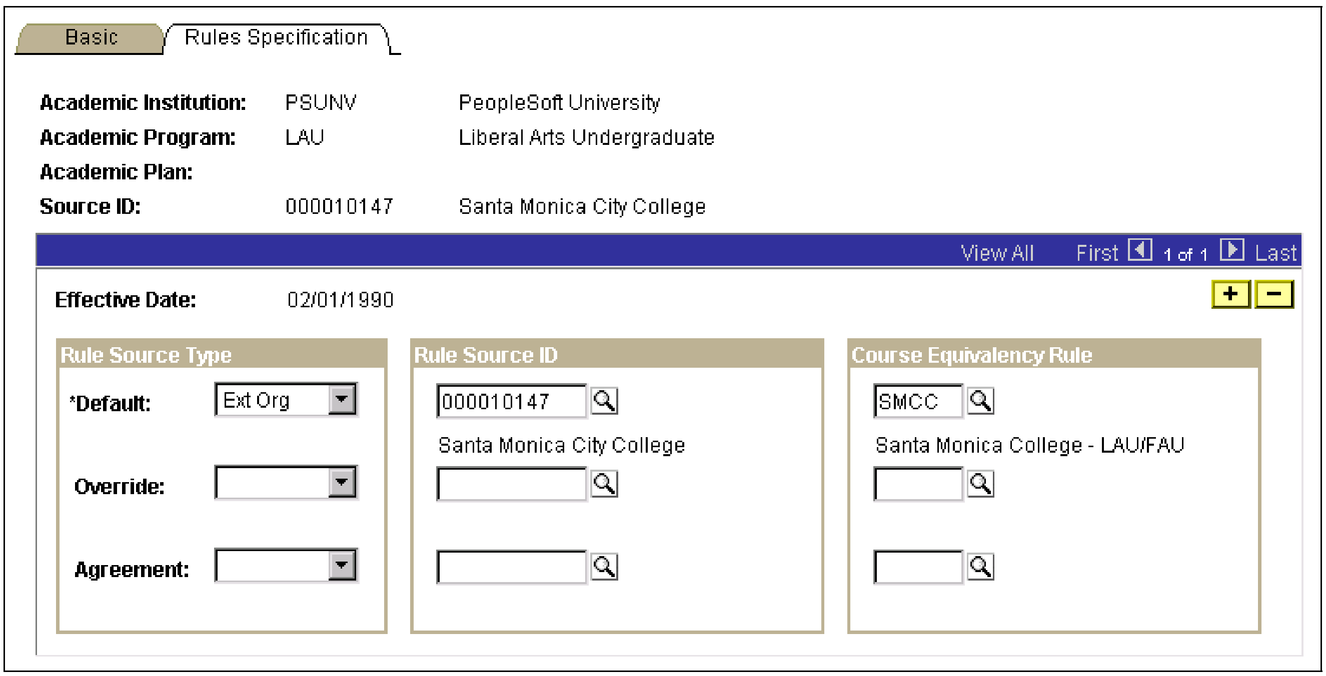
Grading Basis By default, the system displays the grading basis default for transfer credit according to the specified academic program. Define grading-basis defaults for transfer-credit values on the Program 1 page of the Academic Program Table component for academic programs. Define grading-basis defaults for transfer-credit values on the Academic Career Table page for academic careers. You can override this default value now, and you can later override this value for individual transfer courses that you process. This grading basis defines all of the valid grades from which you can select a default transfer grade for this academic program, academic plan, and source combination.

Transfer Grade By default, the system displays the default transfer grade of the specified academic program. Define default transfer grades for academic programs on the Program 1 page of the Academic Program Table component. Define default transfer grades for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer courses that you process. This transfer grade defines the grade that an individual receives for courses that articulate into the specified academic program or academic plan.

Transfer HS Courses (transfer high school courses) — To include any course taken during high school in an individual's transfer credit for this academic program, academic plan, and source combination, select this check box. Clear this check box to exclude courses taken during high school.

Setting Equivalency Rules

Access the Rules Specification page.



Rules Specification page

You must specify the credit source type from which you will be selecting your source ID. By selecting *external organization,* the system prompts you with the source IDs of external organizations in your system. By selecting *institution,* the system prompts you with source IDs of academic institutions you have defined in your system.

The following three group boxes all have the Agreement, Override, and Default fields. Each identically named field functions as a row of data to define a course equivalency rule. Each of these fields is documented once, following the group box definitions. As the Transfer Credit process evaluates courses, it will use the rules in the following order: agreement, override, default.

Rule Source Type

Use the fields in this group box to select the table from which you will be choosing each of your course equivalency rules for this academic program/plan and source combination. Select from the following choices.

External Org (external organization): — The system will prompt you with the external organization source IDs in your system. Because external organizations and internal academic institutions can share the same course catalog, you might want to point to a different source ID for the course catalog.

Institution The system will prompt you with institution source IDs in your system.

Rule Source ID

Use the fields in this group box to select the source ID for the course transfer equivalency rule for this academic program/plan and source combination. You can point to any sources rules.

Course Equivalency Rule

Use the fields in this group box to select the specific course transfer equivalency rules for this academic program, academic plan, and source combination.

Common Course Equivalency Rule Fields

Agreement The Transfer Credit process uses the course equivalency rule that you specify on this row first. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you have not specified a rule for this row, or if the transfer course does not meet the criteria of the rule, the process then evaluates the course equivalency rule that you specify on the Override row.

Override The Transfer Credit process uses the course equivalency rule that you specify on this row second. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you have not specified a rule for this row, or if the transfer course does not meet the criteria of the rule, the process then evaluates the course equivalency rule that you specify on the Default row.

Default The Transfer Credit process uses the course equivalency rule that you specify on this row last. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you have not specified a rule for this row, or if the transfer course does not meet the criteria of the rule, the process will not articulate the course. In this case, the transfer course appears on the Transfer Course Details page with a status of *no rule.*

Note. If you only have one rule for this source, you must enter it in Course Equivalency Rule field on the Default row. The Default row is the only row on the page that requires a course equivalency rule.

Creating Test Transfer Equivalency Rules

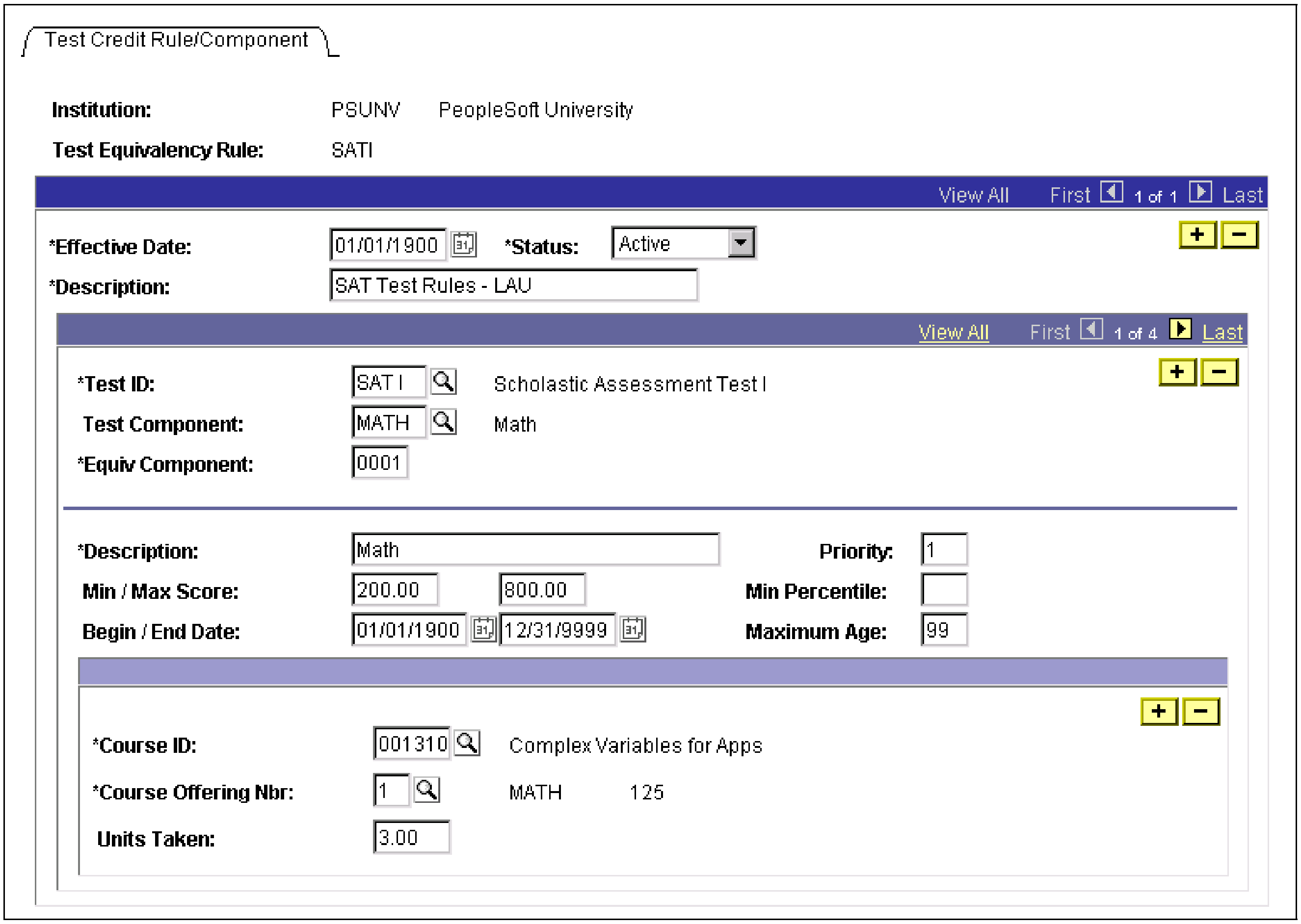
This section discusses how to define test transfer equivalency rules.

Page Used to Create Test Transfer Equivalency Rules

Page Name	Object Name	Navigation	Usage
Test Credit Rule/Component	TEST_CREDIT_COMP	Manage Student Records, Process Transfer Credit, Setup, Test Transfer Rules, Test Credit Rule/Component	Define sets of test transfer equivalency rules.

Defining Test Transfer Equivalency Rules

Access the Test Credit Rule/Component page.



Test Credit Rule/Component page

Setting up your test transfer equivalency rules is similar to setting up your course credit transfer equivalency rules. For each test equivalency rule that you define, describe the rule, select the test and test component for the rule, and specify course equivalencies for the test component.

Test ID

Select the identification number of the test for which you are defining this test equivalency rule.

Test Component

Select the component of the test for which you are defining this test equivalency rule.

Equiv. Component (equivalent component)	The equivalency component number is the numeric counter that distinguishes each row of the test equivalency rule apart from other rows. By default, the system displays the first equivalency component of the test equivalency rule to *0001* and increases the number by one as you add rows.
Description (lower)	This field describes the row of the equivalency test rule. By default, the system displays the description of the test component according to the description on the Test Component Table page. You can override this default value.
Transfer Priority	Enter the transfer priority number for this row of the test equivalency rule. The Transfer Credit process evaluates the rows within the test equivalency rule according to the transfer priority of each row. The test component within the row that has the highest value takes priority. If an individual's transfer test meets all conditions of the test equivalency rule, then the Transfer Credit process uses the equivalent course as defined on the row with the highest transfer priority. However, if the individual's transfer test does not meet the conditions of the test equivalency rule, then the Transfer Credit process evaluates the row with the next highest transfer priority.
Min/Max Score (minimum and maximum score)	Enter the minimum and maximum score of applicable transfer tests for this row of the test equivalency rule, or enter the minimum percentile.
Minimum Percentile	Enter the minimum percentile of the applicable transfer tests for this row of the test equivalency rule, or enter the minimum and maximum score.
Begin/End Date	By default, the system sets the begin and end date of the transfer test to *01/01/1900* and *12/31/9999.* You can override these default values. These dates inform the Transfer Credit process when the applicable transfer test must be taken for this row of the test equivalency rule.
Maximum Age	This field defines, in years, the maximum age of the transfer tests for this row of the test equivalency rule. This prevents an individual from transferring test credit into your academic institution if the individual took the test more years ago than the number of years that you specify here. By default, the system sets the maximum age of a transfer test to *99,* but you can override this default value. For instance, you might want restrict an individual from receiving transfer credit for a test if the individual took the test more than *4* years prior to the date that your institution processes the individual's transfer credit.
Course ID	Select the course to which the given test component is equivalent. The system prompts you with courses from your academic institution's course catalog. You can add rows to create a one-to-many test equivalency rule. You're prompted from your course catalog. The system automatically populates the Course Offering Number and Units Taken fields with values from the course catalog definition. You can select a different offering number and enter different units.
Course Offering Number	By default, the system displays the course offering number of the specified course according to the value in your academic institution's course catalog. You can override this default value.

Units Taken By default, the system displays the units taken value of the specified course according to the value in your academic institution's course catalog. You can override this default value.

See Also

Chapter 4, "Setting Up the Course Catalog," page 65

Defining Test Equivalencies for Academic Programs and Plans

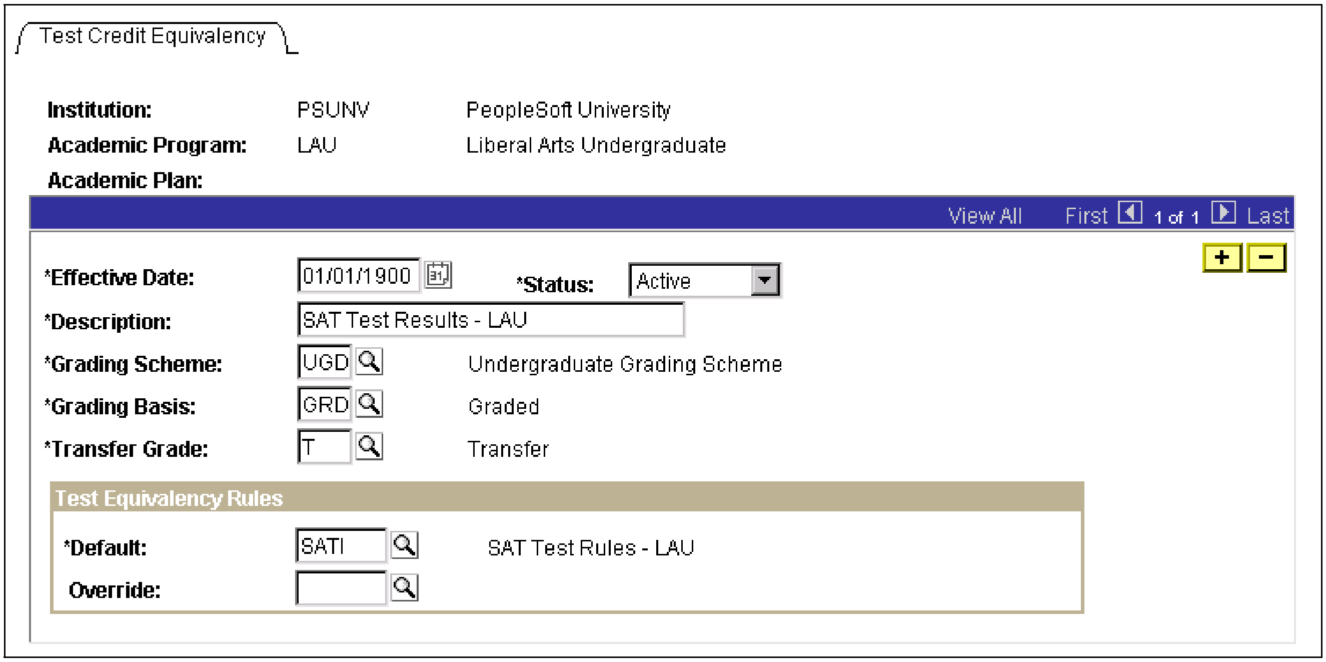
This section discusses how to set test equivalencies for academic programs and plans.

Page Used to Define Test Equivalencies for Academic Programs and Plans

Page Name	Object Name	Navigation	Usage
Test Credit Equivalency	TEST_CREDIT_EQUIV	Manage Student Records, Process Transfer Credit, Setup, Program/Test Equivalency, Test Credit Equivalency	Set the test transfer equivalency rules that the Transfer Credit process uses to evaluate transfer test credit for specific academic programs and academic plans.

Setting Test Equivalencies for Academic Programs and Plans

Access the Test Credit Equivalency page.



Test Credit Equivalency page

General Fields

Grading Scheme

By default, the system displays the grading scheme of the specified academic program. Define grading schemes for academic programs on the Program 1 page of the Academic Program Table component. Define grading schemes for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer tests that you process. This grading scheme defines all of the valid grading bases from which you can select a default transfer grade for this academic program or academic plan.

Grading Basis

By default, the system displays the grading basis default for transfer credit according to the specified academic program. Define grading-basis default for transfer-credit values for academic programs on the Program 1 page of the Academic Program Table component. Define grading-basis default for transfer-credit values for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer tests that you process. This grading basis defines all of the valid grades from which you can select a default transfer grade for this academic program or academic plan.

Transfer Grade

By default, the system displays the default transfer grade of the specified academic program. Define default transfer grades for academic programs on the Program 1 page of the Academic Program Table component. Define default transfer grades for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer tests that you process. This transfer grade defines the grade an individual will receive for tests that articulate into the specified academic program or academic plan.

Test Equivalency Rule

Use the fields in this group box to select the specific test transfer equivalency rules for this academic program or academic plan. As the Transfer Credit process evaluates test credit, it will use the rules in the following order: Override, Default.

Default

The Transfer Credit process uses the test equivalency rule that you specify on this row last. If the transfer test meets the criteria of the rule specified on this row, the process applies the rule to the transfer test and evaluates the test no further. If you have not specified a rule for this row, or if the transfer test does not meet the criteria of the rule, the process will not articulate the test. In this case, the transfer test appears on the on the Test Credit Details page with a status of *no rule.*

Note. If you only have one rule for this academic program or academic plan, you must enter it in the Default field. The Default field is the only required field on the page.

Override

The Transfer Credit process uses the test equivalency rule that you specify on this row first. If the transfer test meets the criteria of the rule specified on this row, the process applies the rule to the transfer test and evaluates the test no further. If you have not specified a rule for this row, or if the transfer test does not meet the criteria of the rule, the process then evaluates the test equivalency rule that you specify on the Default row.

For instance, you might have a general test equivalency rule for the Undergraduate Liberal Arts program but have a different rule for the English plan within this academic program. You would create two test transfer equivalency rules, then enter the Liberal Arts program equivalency rule in the Default field, and the English plan equivalency rule in the Override field.

CHAPTER 8

Setting Up Attendance Tracking

This chapter lists prerequisites and discusses how to set up attendance tracking data.

See Also

Chapter 30, “Tracking Attendance,” page 673

Prerequisites

Before you can generate class attendance rosters, or record student attendance, you must:

1. Define attendance type translate values in PeopleSoft Application Designer.
2. Set a default attendance type for each academic institution in your system.
3. Define courses in the course catalog.
4. Define all possible instruction modes, attendance types, and attendance type data for each course component in the course catalog.
5. (Optional) Set the attendance tracking generation flag for each class in the schedule of classes.

Setting Up Attendance Tracking Data

This section discusses how to:

- Define attendance type translate values.
- Select a default class meeting attendance type.
- Define attendance tracking options for course components.
- Indicate attendance roster generation for a class.

Pages Used to Set Up Attendance Tracking

Page Name	Object Name	Navigation	Usage
Academic Institution Table 3	INSTITUTION_TABLE3	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 3	Specify a default class meeting attendance type for each institution.
Course Catalog - Components	CRSE_CATALOG_CMPNT	Manage Student Records, Establish Courses, Use, Course Catalog, Components	Set catalog-level defaults for both batch attendance roster generation and instruction mode
Schedule of Classes - Basic Data	CLASS_ENTRY	• Manage Student Records, Establish Courses, Use, Schedule New Course, Basic Data • Manage Student Records, Establish Courses, Use, Schedule of Classes, Basic Data	Modify the Generate Class Mtg Attendance check box and instruction mode values that default from the Course Catalog - Components page.

Defining Attendance Type Translate Values

PeopleSoft delivers the following attendance type translate values: Conference, Instructor Consultation, Field Trip, Class Meeting, and Study Group. Use PeopleSoft Application Designer to modify or add to these values. The field name is CLASS_ATTEND_TYP. However, be careful to not delete a value that is in use.

Selecting a Default Class Meeting Attendance Type

Use the Academic Institution Table 3 page to specify a default class meeting attendance type for each institution. In batch mode, the system generates only one roster per class (even if you have specified multiple attendance types are on the Components page), so the value that you specify applies to all classes. The system uses the default attendance type value that you specify to determine the correct attendance type row and related attendance type detail for each class. Each class should have at least one row on the Course Catalog - Components page, with the same attendance type as the default attendance type.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Setting Additional Institution Defaults and Options

Defining Attendance Tracking Options for Course Components

Use the Course Catalog - Components page to set catalog-level defaults for both batch attendance roster generation and instruction mode and to define all possible attendance types and attendance type detail data.

See Also

Chapter 4, “Setting Up the Course Catalog,” Defining Course Components, page 82

Indicating Attendance Roster Generation for a Class

Use the Schedule of Classes - Basic Data page to modify the Generate Class Mtg Attendance check box and instruction mode values that default from the Course Catalog - Components page. You can set this flag at the catalog level and the schedule of classes level. This check box enables you to select the exact course components and classes for which your institution generates attendance rosters.

See Also

Chapter 17, “Managing the Schedule of Classes,” Defining Basic Data for Class Sections, page 353

CHAPTER 9

Preparing to Track Student Data

Using PeopleSoft Student Records, you can set up, track, and view non-course related student data.

This chapter provides discusses how to set up the following items:

- Academic standing
- Honors and awards
- Special grade point averages
- Committees and committee members
- Milestones
- Extracurricular activities
- Student groups
- Student attributes

Common Elements in This Chapter

Transcript Level Select the transcript level on which you want the given data to print. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Degr Prog* (degree progress), *Not Print, Official, Stdnt Life* (student life), and *Unofficial.*

See Also

Chapter 13, "Setting Up Transcripts," Understanding Transcript Levels, page 255

Setting Up Academic Standing

With academic standing action codes and rules, you can create sets of guidelines for every academic career within your institution. You can then use these codes and rules to assign academic standing to students, either by running the Acad Standing/Honors Awards process (SRPCEASD) through the Academic Standing/Honors and Awards page to evaluate students' academic standing, or, by entering academic standing codes directly onto a student's term history record through the Academic Standing page.

This section discusses how to:

- Define academic standing action codes on the Academic Standing Table page.
- Create academic standing rules on the Academic Standing Rule page.
- Link academic standing rules to academic programs on the Standing page.

See Also

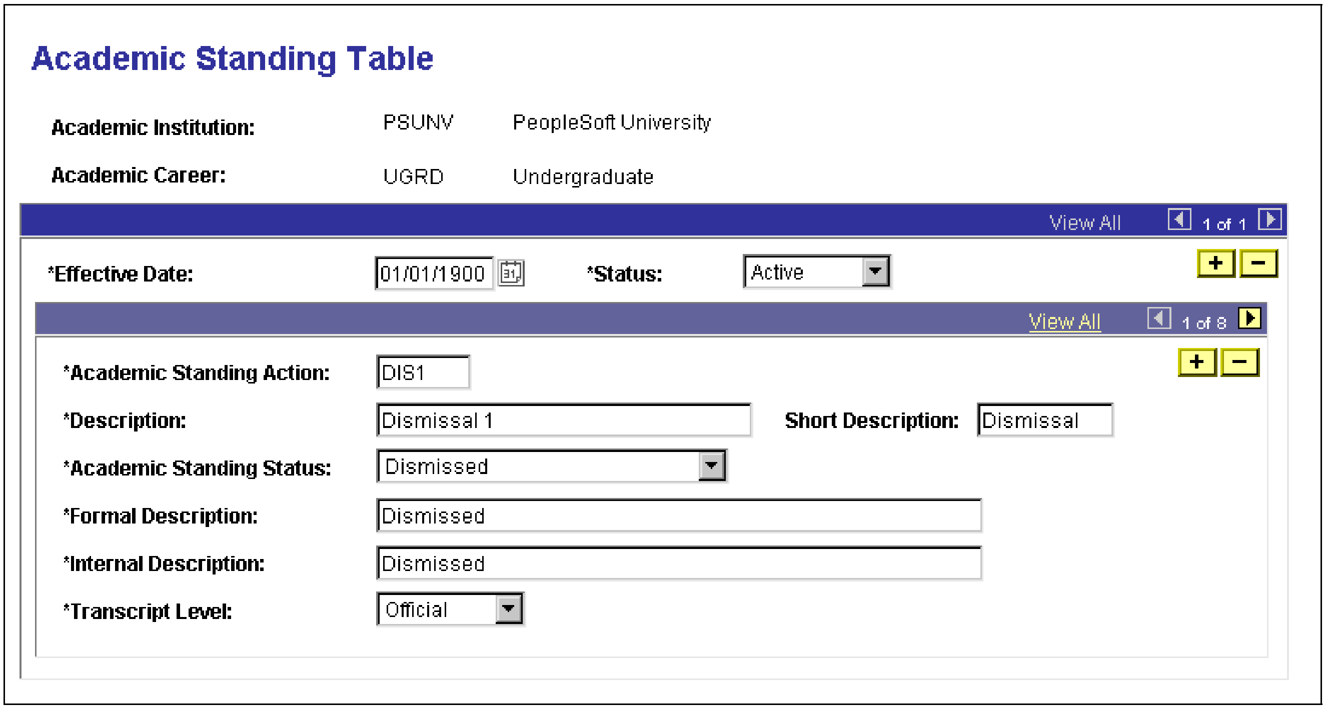
Chapter 31, "Tracking Student Data," page 695

Pages Used to Set Up Academic Standing

Page Name	Object Name	Navigation	Usage
Academic Standing Table	ACAD_STDNG_TBL	• Design Student Administration, Define Student Records, Setup, Academic Standing Table • Manage Student Records, Manage Academic Records, Setup, Academic Standing Table	Define academic standing action codes for every academic career within your institution.
Academic Standing Rule	ACAD_STDNG_RULE	• Design Student Administration, Define Student Records, Setup, Academic Standing Rule • Manage Student Records, Manage Academic Records, Setup, Academic Standing Rule	Create academic standing rules. Academic standing rules are keyed by academic career, so define a broad description for an academic standing rule (such as *Undergraduate Rules* or *Graduate Rules).* Within each rule, you create detail lines that correspond with academic standing action codes that you define.
Standing	ACAD_PROG_STDG_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Standing	Link academic standing rules to academic programs.

Defining Academic Standing Action Codes

Access the Academic Standing page.



Academic Standing Table page

Creating academic standing action codes is a precursor to defining academic standing rules. Therefore, to define academic standing action codes, you'll have to think about how they can be used in the rule sets for the academic standing process.

For example, suppose that students at your institution receive two warnings before being placed on probation, and the warnings are of different degrees. That is, if students receive a second warning it is more severe. In this case you would define two different academic standing action codes for warnings since you want to distinguish them. Later, you define rule details for these codes, and for all other academic standing action codes defined on this page.

Note. If you want to inactivate an academic standing action code that is attached to an academic standing rule, delete the code where it is attached to the rule on the Academic Standing Rule page and enter a status of *Inactive* on the Academic Standing Table page.

Academic Standing Action Enter an academic standing action code.

Academic Standing Status Select an academic standing status. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Dismissed, Good Standing, Probation,* and *Subject to Dismissal.*

You can have many academic standing action codes that contain the same academic standing status. For example, *DIS1, DIS2,* and *DIS3* can all contain a status of *Dismissed.*

Formal Description Enter a formal description. If you choose to have the academic standing action appear on a student's transcript, the system displays the formal description.

Internal Description Enter a description to be used for internal purposes only.

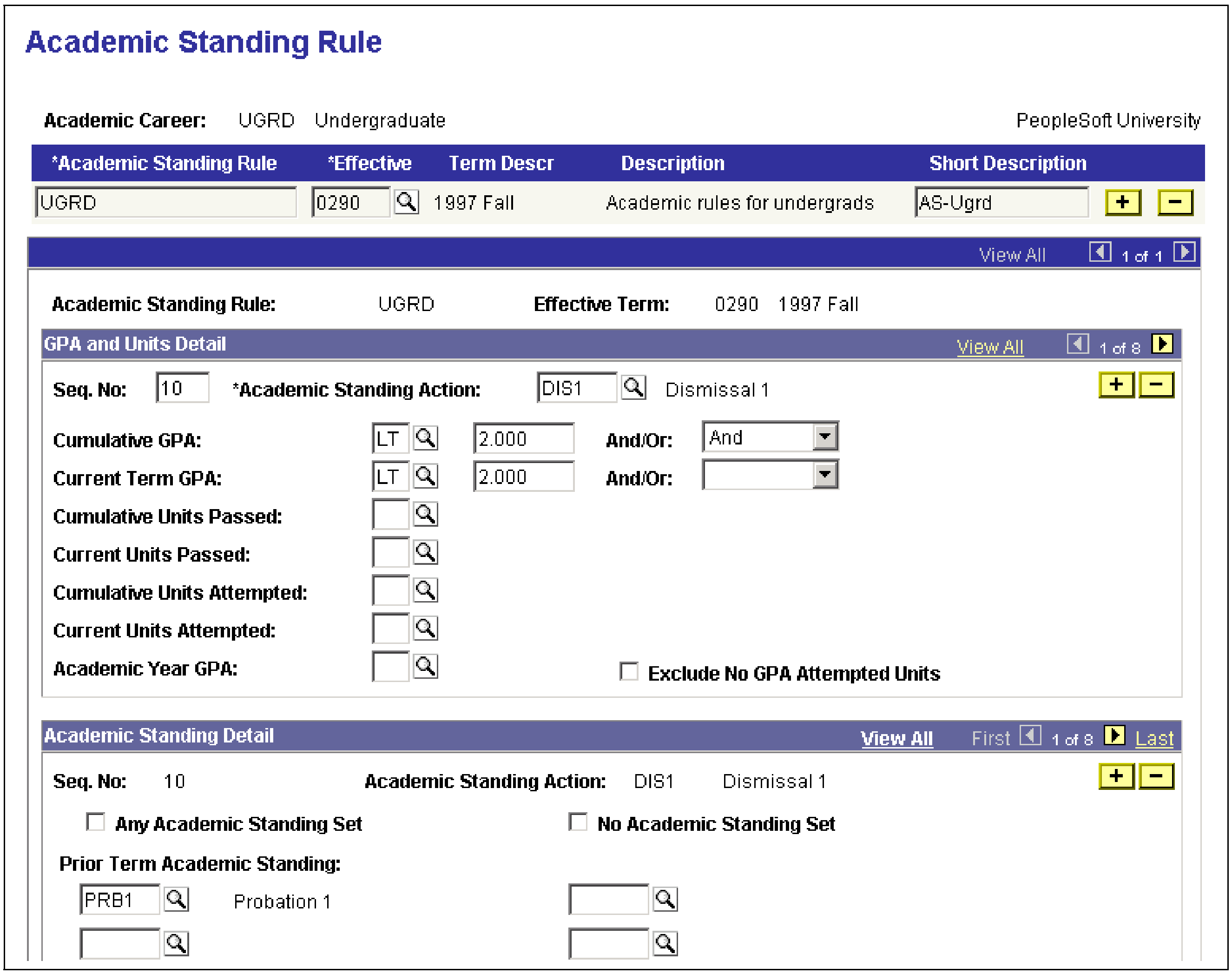
Transcript Level Select the transcript level on which you want the academic standing to print. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Degr Prog* (degree progress), *Not Print, Official, Stdnt Life* (student life), and *Unofficial.*

See Also

Chapter 13, "Setting Up Transcripts," Understanding Transcript Levels, page 255

Creating Academic Standing Rules

Access the Academic Standing Rule page.



Academic Standing Rule page

Academic Standing Rule Enter an alphanumeric code that identifies this academic standing rule code.

Effective Select the effective term of the rule. When the system uses the rules that you define here in the Academic Standing process, it verifies that the rule is effective within the term for which the process is running.

Seq No (sequence number)	Enter the sequence number order in which the system evaluates the rule. Sequence your rules from the most severe academic standing action to the least severe. Once a student's academic standing matches one academic standing rule, the Academic Standing process applies the academic standing action code to the student's record and moves on to the next student.
Academic Standing Action	Enter the academic standing action code that you want the system to post to students' records if the rule is satisfied. The system populates the Academic Standing page with the appropriate code once you run the academic standing process.
Cumulative GPA, Current Term GPA, Cumulative Units Passed, Current Units Passed, Cumulative Units Attempted, Current Units Attempted, and **Academic Year GPA**	These criteria form your rules. For each criterion that you choose to use in this rule, select a qualifier: Greater Than, Greater Than or Equal To, Less Than, or Less Than Equal or To. Do not modify these values. Then, enter the numeric value for each criterion. In the preceding example, the cumulative grade point average must be less than 2.000 *and* the current grade point average must be less than 2.000. Use the last prompt box to add the connector for the rule: And, Or and blank for none. You can skip any criteria and only enter information in the criteria pertinent for your rule. See the examples to understand the sequencing of rules. **Note.** For the Academic Year GPA field, the system looks at the term for which academic standing is being processed, determines which academic year on which the term falls based on the value in the Term/Session Table component, determines the student's statistics from all terms in that academic year, calculates the student's grade point average, then compares the student's grade point average against the value you enter on this page.
Exclude No GPA Attempted Units	Select this check box in order to exclude from reporting all classes that were attempted, but are not included in the student's GPA (for example, Pass/No Pass courses, W grades, and so on). The grade's corresponding Include in GPA check box on the Grading Scheme Table page must be cleared (not selected) in order for the system to exclude it from processing. Clear this check box in order to include in your report all attempted coursework, regardless of the assigned grade.
Any Academic Standing Set	Select if it does not matter what academic standing action codes students can have on their records prior to this rule evaluation. The other fields on the page become unavailable for input.
No Academic Standing Set	Select if the student's record should possess no academic standing action code.
Prior Term Academic Standing	Select any academic standing code that the student must posses in a prior term to satisfy the rule. For example, in the preceding page shot, the student must possess the *PRB1* (probation 1) code in addition to meeting the grade point average requirements.

Note. By selecting the No Academic Standing Set check box and selecting prior academic standing values, the academic standing rule reads as an 'or' statement. For this rule to apply, the student's record must either possess the academic standing values for the prior term that you select, possess no academic standing action code, or have no prior term for comparison.

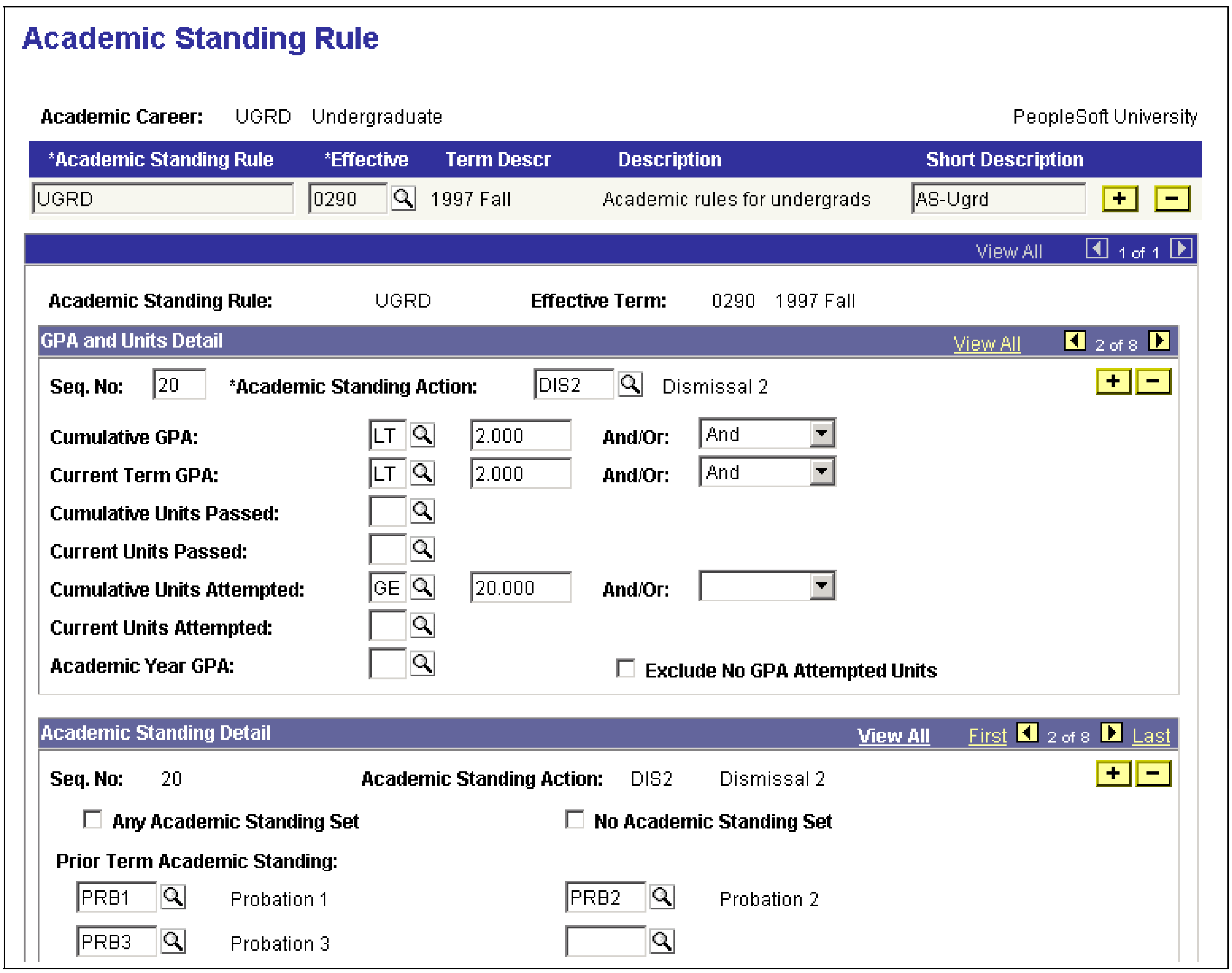
Reviewing an Example Academic Standing Rule

Suppose that you defined seven different academic standing action codes for undergraduates. Because you want to use all of these codes in the Academic Standing process, you have eight rule detail lines in your academic standing rule, each line numbered from sequence number *10* (being the most severe academic standing action code) to sequence number *90* (being the least severe academic standing action code).

The following examples demonstrate some ways to set up academic standing rules.

The Sequencing of Rule Details

The Academic Standing Rule page looks like the following for the *Dismissal 2* action:

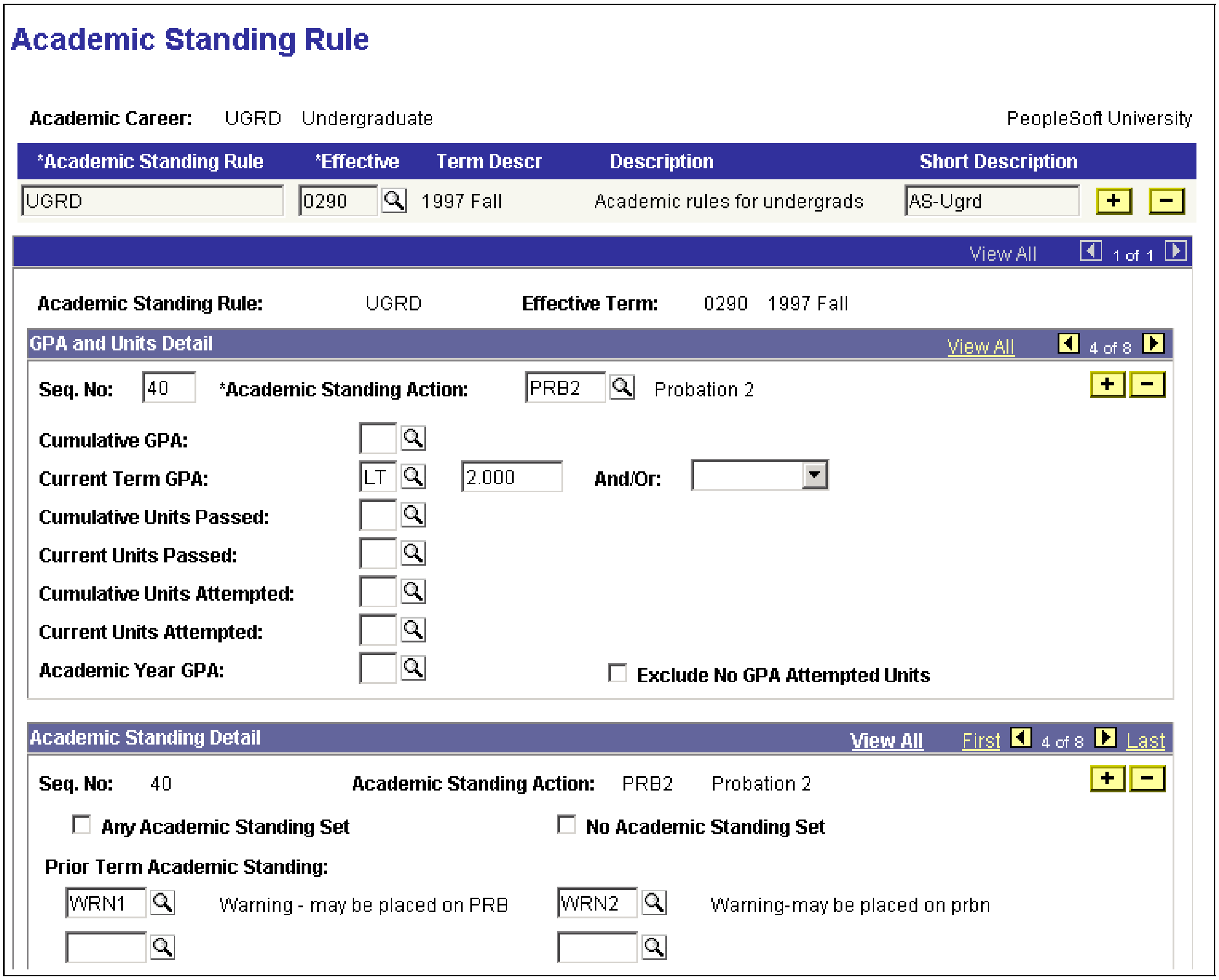


Using Academic Standing Rules: 1 of 4

In this page:

- The system evaluates this rule second since the sequence number is *20,* and one other rule detail line with a lower sequence number exists.
- The cumulative grade point average and current grade point average requirements are higher than that of the sequence number *10* rule, but can be the same or less than that of subsequent rules. You can have the same grade point average requirement, for instance, for probation and dismissal. Differentiate these actions by the prior academic standing codes students must possess.
- Students must possess one of the academic standing action codes listed in the Prior Term Academic Standing Value field in addition to satisfying the grade point average rules, to satisfy the *Dismissal 2* rule detail.

The Academic Standing Rule page looks like the following for the *Probation 2* academic standing action code:



Using Academic Standing Rules: 2 of 4

In this page:

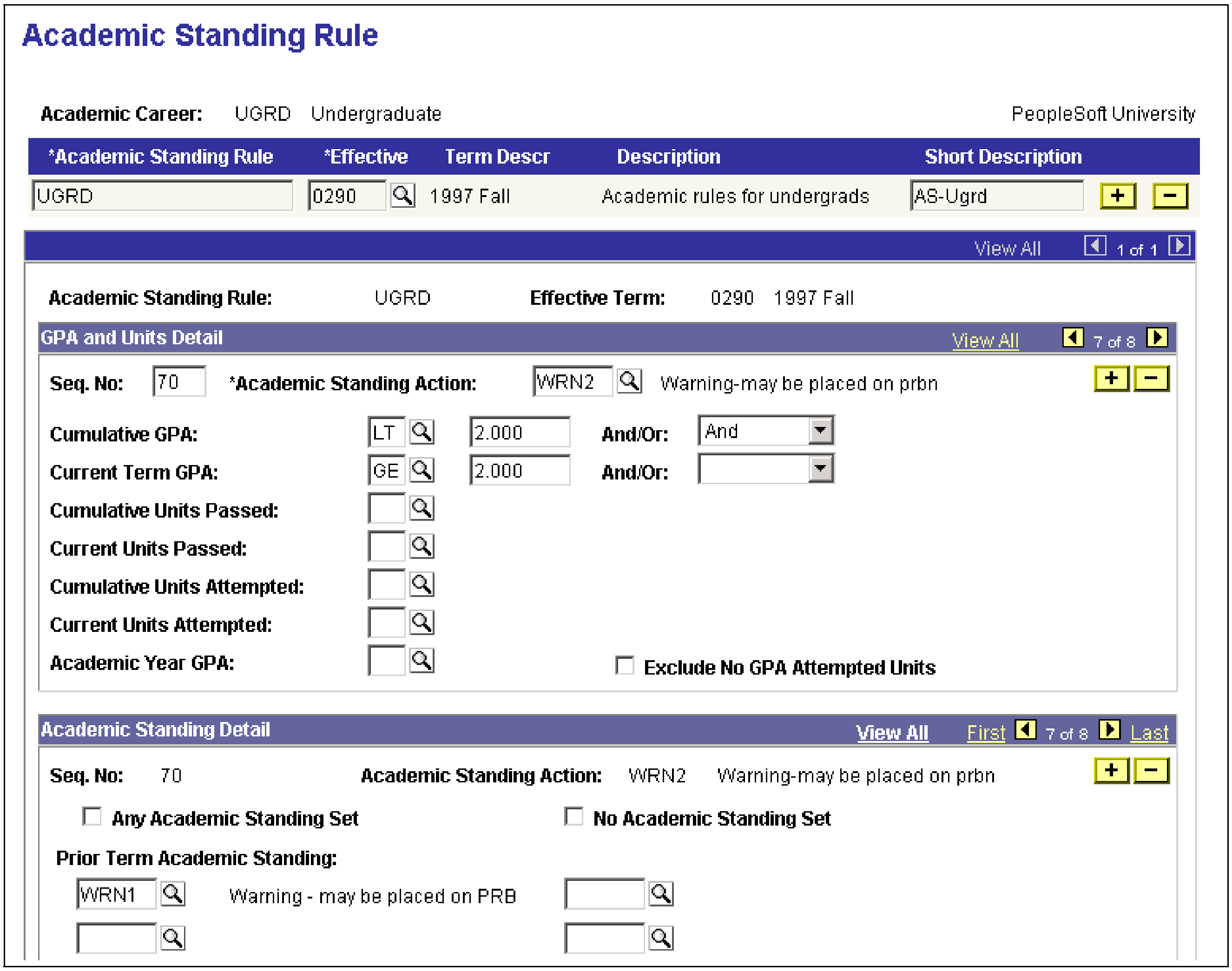
- The rule detail line will be evaluated fourth by the system since the sequence number is *40,* and there are three other detail lines with lower sequence numbers preceding it.
- The system will post the *Probation 2* academic standing action code on student records when they possess a current term grade point average less than *2.000* in conjunction with one of the academic standing action codes selected.

- Students must possess one of the academic standing action codes listed in the Prior Term Academic Standing Value field in addition to satisfying the grade point average rules, to satisfy the *Probation 2* rule detail.

Least Severe Rule Detail

In your rules, the least severe rule detail line is one for *Warning-may be placed on prbn* (warning-may be placed on probation).

The Academic Standing Rule page looks like the following for this rule:



Using Academic Standing Rules: 3 of 4

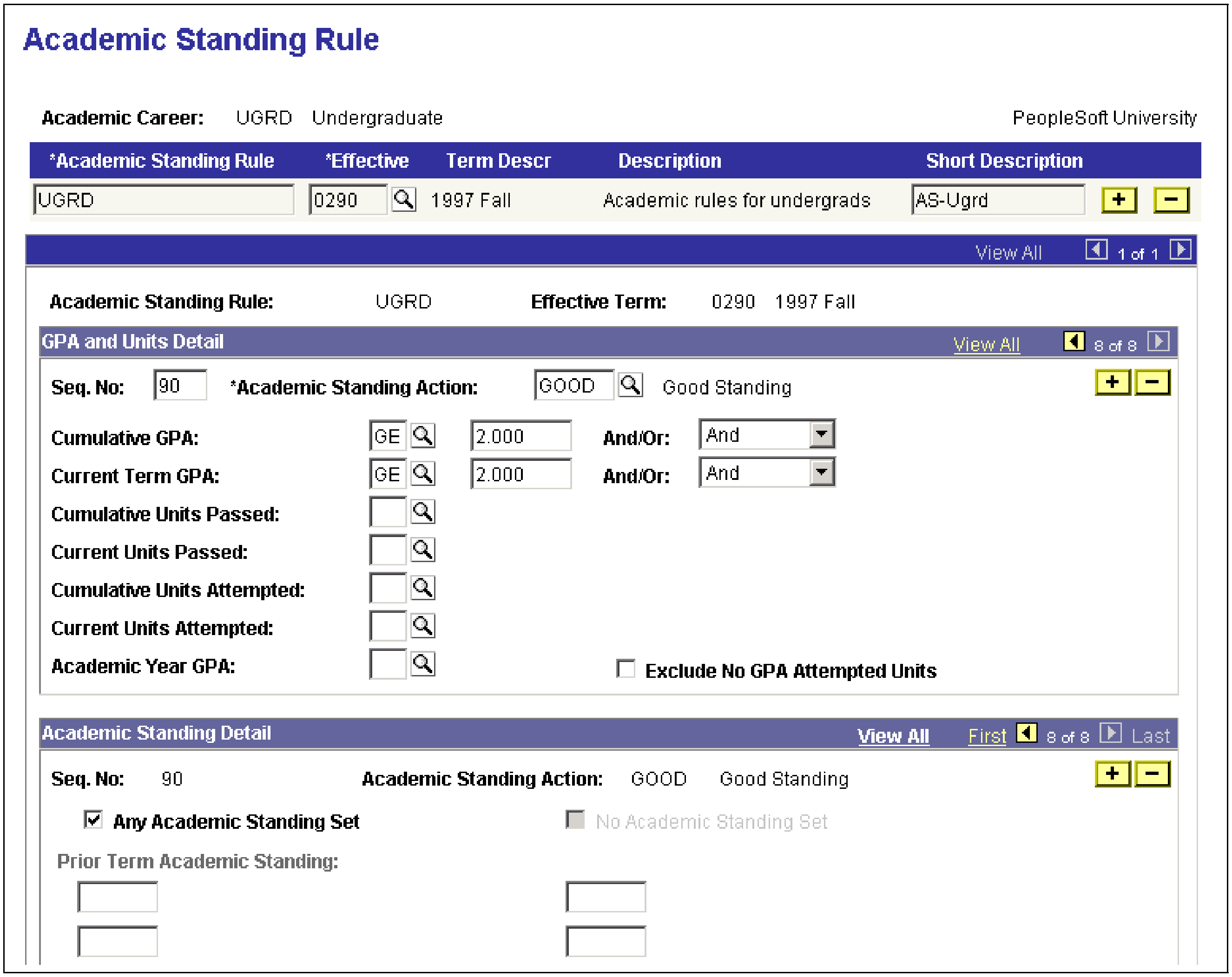
In this page:

- The rule detail line will be evaluated last by the system since the sequence number is *80,* and there are seven other detail lines with lower sequence numbers preceding it.
- Students must possess a cumulative grade point average and a current term grade point average that is greater than or equal to *2.000.* In addition, the student must possess one of the following academic-standing action codes stipulated on the Academic Standing Rule page.
- Students must possess at least one of the academic standing action codes on their record, in addition to the rules set on the Academic Standing Rule page to satisfy the *Warning-may be placed on prbn* rule detail.

Good Standing Rule Detail

In your rules, the last rule detail line is one for *Good Standing.*

The Academic Standing Rule page looks like the following for this rule:



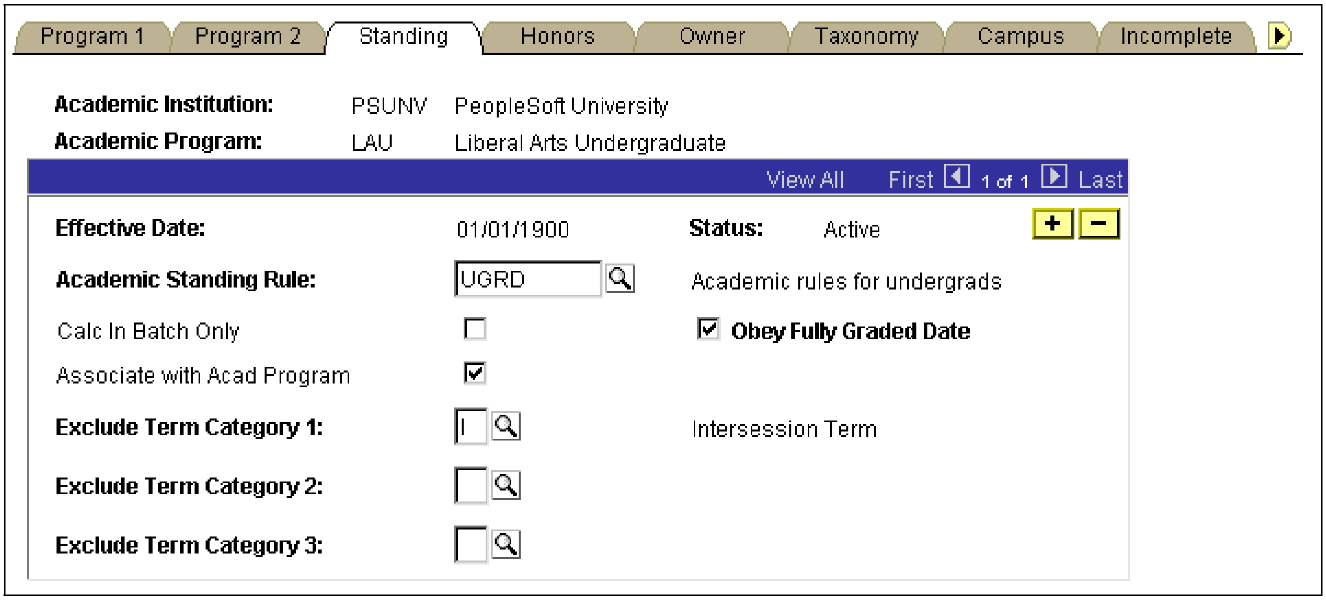
Using Academic Standing Rules: 4 of 4

In this page:

- This detail line will be evaluated last because the sequence number is *90,* and all other rule detail lines precede it possessing lower sequence numbers.
- Students must possess a cumulative grade point average and a current-term grade point average that is greater than or equal to *2.000.* In addition, the student must possess no academic standing action codes stipulated on the Academic Standing Rule page.

Linking Academic Standing Rules to Academic Programs

Access the Standing page.



Standing page

Academic Standing Rule

Select the academic standing rule for this academic program.

Calc in Batch Only (calculate in batch only)

Select to calculate academic standing through a background process using the Academic Standing/Honors Awards page. If you select this check box, the system does not calculate academic standing dynamically, such as when you post grades.

Clear to have the system call the academic standing process when posting or changing a grade on the Quick Enrollment or Enrollment Request pages, and when posting a grade on the Grade Roster page. The academic standing process inserts an updated academic standing row, viewable on the Academic Standing page of the Term History component, except when a student's class is graded with a grade that count towards GPA and then later changed to a non-GPA grade. In such a scenario, you must manually update the student's academic standing the Academic Standing page.

Obey Fully Graded Date

Select to calculate academic standing only when grades are posted on or later than the fully graded date. The system does not calculate academic standing if this check box is selected and grades are posted before the student's fully graded date. You define the default fully graded date on the Academic Term Calendar 3 page in the Academic Calendar component and an individual student's fully graded date on Term Control Dates page in the Term Activation component.

Associate with Acad Program

Select to associate the academic standing rule only with students in this academic program. This is especially useful for students who might be in multiple academic programs; you might want to apply different academic standing rules with different academic programs. If you do not select this check box, the system associates the academic standing rule with the student's academic career.

Exclude Term Category 1, 2, and **3**	Select the terms in which the system does not calculate academic standing. Values for this field are delivered with your system as translate values. You can modify these values.

Setting Up Honors and Awards

Honors and awards include internal and external awards that you want to record for students. With honor and award codes and rules, you can create sets of guidelines for every academic career within your institution. You can then use these codes and rules to assign honors and awards to students, either by running the Acad Standing/Honors Awards process (SRPCEASD) through the Academic Standing/Honors and Awards page to evaluate students' honors and awards, or, by entering honor/award codes directly onto a student's record through the Honors and Awards page.

This section discusses how to:

- Define honor/award codes on the Honors/Awards Table page.
- Create honor award rules on the Honors and Awards Rule page.
- Link honor award rules to academic programs on the Honors page.

See Also

Chapter 31, "Tracking Student Data," Tracking Honors and Awards, page 699

Pages Used to Set Up Honors and Awards

Page Name	Object Name	Navigation	Usage
Honors/Awards Table	SA_HON_AWRD_TABLE	• Design Student Administration, Define Campus Community, Setup, Honors and Awards Table • Design Student Administration, Define Student Records, Setup, Honors/Awards Table • Manage Student Records, Manage Academic Records, Setup, Honors/Awards Table • Manage Student Records, Track Student Careers, Setup, Honors/Awards Table	Define honor and award codes for internal and external awards.
Honors and Awards Rule	HONOR_AWRD_RULE	• Design Student Administration, Define Student Records, Setup, Honors/Awards Rule • Manage Student Records, Manage Academic Records, Setup, Honors/Awards Rule	Create honor and award rules.
Honors	ACAD_PROG_HNRS_ TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Honors	Select honor/award rule and parameters for this academic program.

Defining Honor/Award Codes

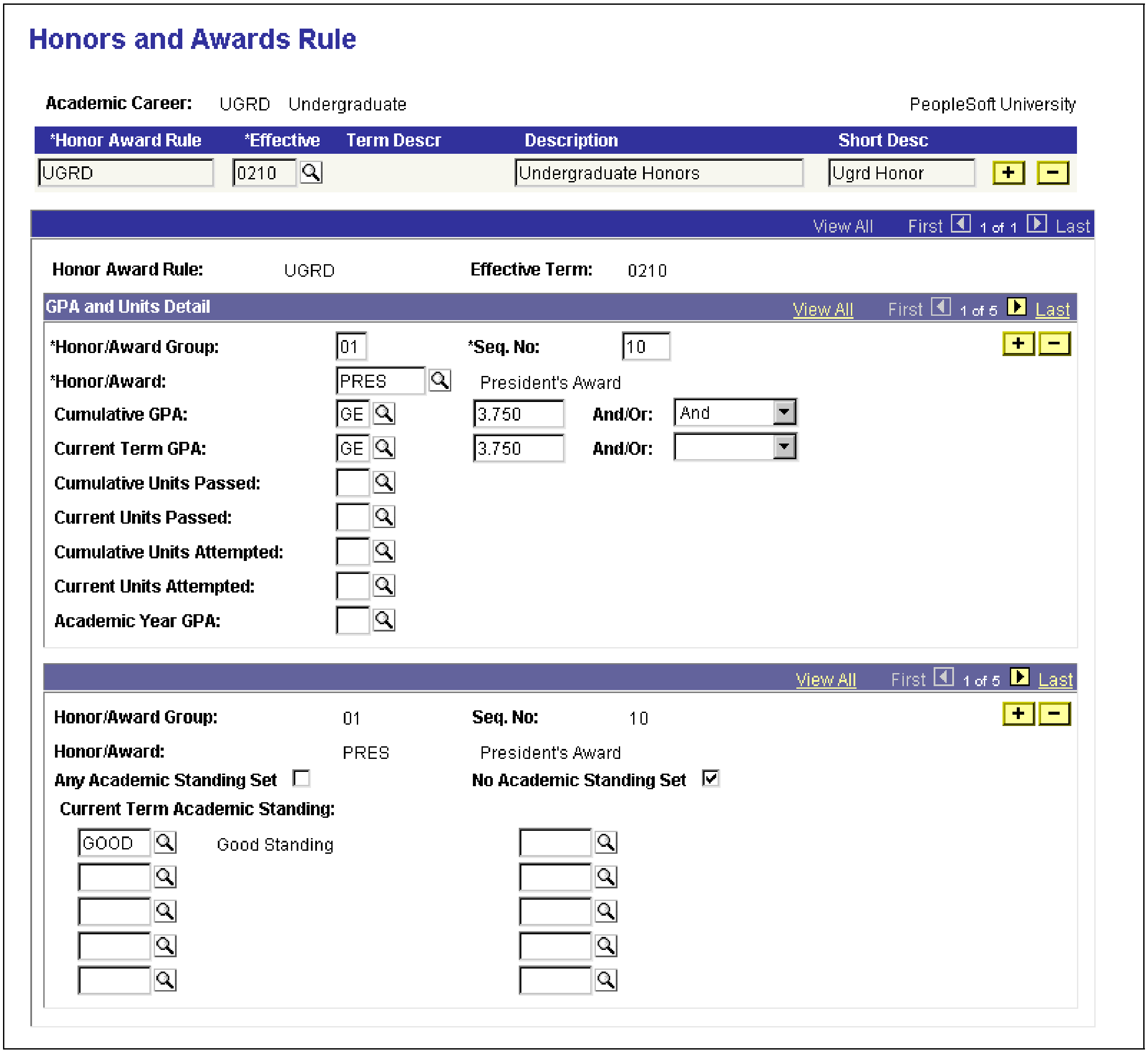
Access the Honors/Awards Table page.

Internal/External Indicate whether the honor or award relates to an external organization or your internal institution.

Grantor Enter the grantor of the honor or award.

Creating Honor Award Rules

Access the Honors and Awards Rule page.



Honors and Awards Rule page

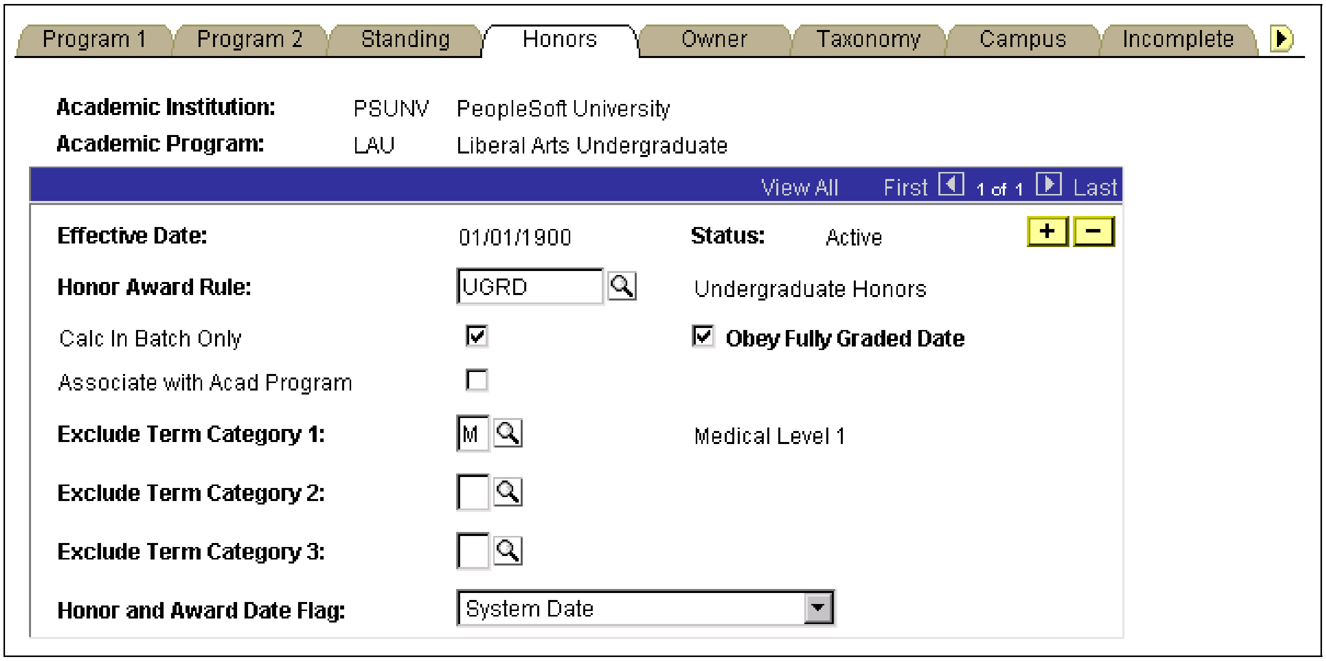
Define rules for every honor and award code that you want to use in the Honors/Awards process. Honor and award rules are keyed by academic career, therefore, create a broad description for your honor and award rules (such as *Undergraduate Rules* or *Graduate Rules).* To define honor and award rules, name the rule, define parameters for the rule, and select the academic standing codes that a student must currently possess in order for the rule detail line to be satisfied. Every rule detail line can have current academic-standing code requirements. For instance, you can require that in addition to other criteria you defined, the student possesses the academic standing code of *GOOD* to meet the requirements for the *Highest Freshman GPA Award.*

Honor Award Rule	Enter an alphanumeric code that identifies this honor and award rule code.
Effective	Select the effective term for the rule. When the system uses the rules in the Honor/Award process, it verifies that the rule is effective within the term for which the process is run.

Honor/Award Group	The default honor and award group number is 01. Group awards together that are mutually exclusive, because the system processes honors and awards by group, and within a group by sequence number. In our example, the President's Award and the Dean's List honors are mutually exclusive. If students are granted one award they will not be granted the other. By grouping the awards together, you prevent the system from granting a student both awards.
Seq No (sequence number)	Enter the sequence in which the system evaluates the rule. Sequence your rules from the most restrictive to the least restrictive. In our example, the President's Award has a sequence number of 10 and the Dean's List honor has a sequence number of 20. The President's Award is more restrictive than the Dean's List honor, so it is sequenced first. The Dean's List honor is slightly less selective, so it is sequenced second.
Honor/Award	Select the honor and award code that the system will post to students' records if they satisfy the rule. Define honor and award codes on the Honors/Awards Table page. The system populates the student Honors and Awards page with the appropriate code when you run the Honors/Awards process.
Cumulative GPA, Current Term GPA, Cumulative Units Passed, Current Units Passed, Cumulative Units Attempted, Current Units Attempted, and **Academic Year GPA**	These criteria form your rules. For each criterion that you choose to use in this rule, select a qualifier: Greater Than, Greater Than or Equal To, Less Than, or Less Than Equal or To. Do not modify these values. Then, enter the numeric value for each criterion. In the preceding example, the cumulative grade point average must be greater than or equal to 3.750 *and* the current grade point average must be greater than or equal to 3.750. Use the last prompt box to add the connector for the rule: And, Or and blank for none. You can skip any criteria and only enter information in the criteria pertinent for your rule. **Note.** For the Academic Year GPA field, the system looks at the term for which academic standing is being processed, determines which academic year the term falls on based on the value in the Term/Session Table component, determines the student's statistics from all terms in that academic year, calculates the student's grade point average, then compares the student's grade point average against the value you enter in the page.
Any Academic Standing Set	Select if the student would be eligible for this honor or award no matter what his or her academic standing.
No Academic Standing Set	Select if the student would be eligible for this honor or award only if he or she was not assigned an academic standing code.
Current Academic Standing Values	Select the academic standing values a student must possess to satisfy this rule. Define academic standing values on the Academic Standing Table page. In the preceding example, the student must possess the academic standing code of GOOD to satisfy the rule. Define academic standing values on the Academic Standing Table page.

Linking Honor Award Rules to Academic Programs

Access the Honors page.



Honors page

Honor Award Rule
Select the honor award rule for this academic program.

Calc in Batch Option Only
Select to calculate the honors and awards in batch through the Academic Standing/Honors Awards page. If you select this check box, the system does not calculate honors and awards dynamically, such as when you post grades.

Obey Fully Graded Date
Select to calculate honors and awards only when grades are posted on or later than the fully graded date. The system does not calculate honors and awards if the Obey Fully Graded Date check box is selected and grades are posted before the student's fully graded date. You define the default fully graded date on the Academic Term Calendar 3 page in the Academic Calendar component and an individual student's fully graded date on Term Control Dates page in the Term Activation component.

Associate with Acad Program
Select to associate the honor/award rule only with students in this academic program. This is especially useful for students who might be in multiple academic programs; you might want to apply different honor/award rules with different academic programs. If you do not select this check box, the system associates the honor/award rule with the student's academic career.

Exclude Term Category 1, 2, and **3**
Select the terms in which the system does not calculate honors/awards. Values for this field are delivered with your system as translate values. You can modify these values.

Honor and Award Date Flag
Select the date type that the system posts to students' records for their honors and awards. Values for this field are delivered with your system as translate values. You can modify these values with some programming effort. Your choices are *System Date* and *Fully Graded Date.*

Setting Up Special Grade Point Averages

Every institution has its own unique way of calculating grade point averages. Special grade point averages are averages that you define for your institution that differ from the cumulative grade point average. You can enter special grade point averages for a student's academic program, academic plan, or academic sub-plan. You can then use these special grade point averages to meet your institution's analysis and reporting needs.

This section discusses how to define grade point average (GPA) types.

See Also

Chapter 31, "Tracking Student Data," Tracking Special Grade Point Averages, page 701

Page Used to Set Up Special Grade Point Averages

Page Name	Object Name	Navigation	Usage
Student Special GPA	SPCGPA_TYPE_TBL	Design Student Administration, Define Student Records, Setup, Student Special GPA	Define the types of grade point averages (GPAs) that your institution tracks by entering an effective date, status, and description for each GPA type.

Reviewing Committees and Committee Members

Use committees to indicate advisory roles. Committees can be faculty standing committees, dissertation committees, thesis committees, and so on. Because committees are discussed in more detail in the *PeopleSoft Campus Community PeopleBook,* we will only review them briefly here.

To use committees and committee members:

1. Define committee types and the roles of committee members through the Committee Table page.
2. Assign specific committees to the committee types that you have already defined through Committee Table page.
3. Assign committee members to specific committees through the Committee Members page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Committee Data"

Setting Up Milestones

Milestones are non-course related but vital requirements a student must complete toward degree progress to graduate. You might be able to relate milestones most easily to graduate student progress, but your institution might also use milestones for undergraduates as well. After you define milestones, you can assign milestones and advisors to a student, as well as record the student's completions of milestones and attempts to fulfill them, through the Student Milestones component.

This section discusses how to:

- Define milestones and the levels within them on the Milestone Table page.
- Create milestone templates on the Milestone Template page.

See Also

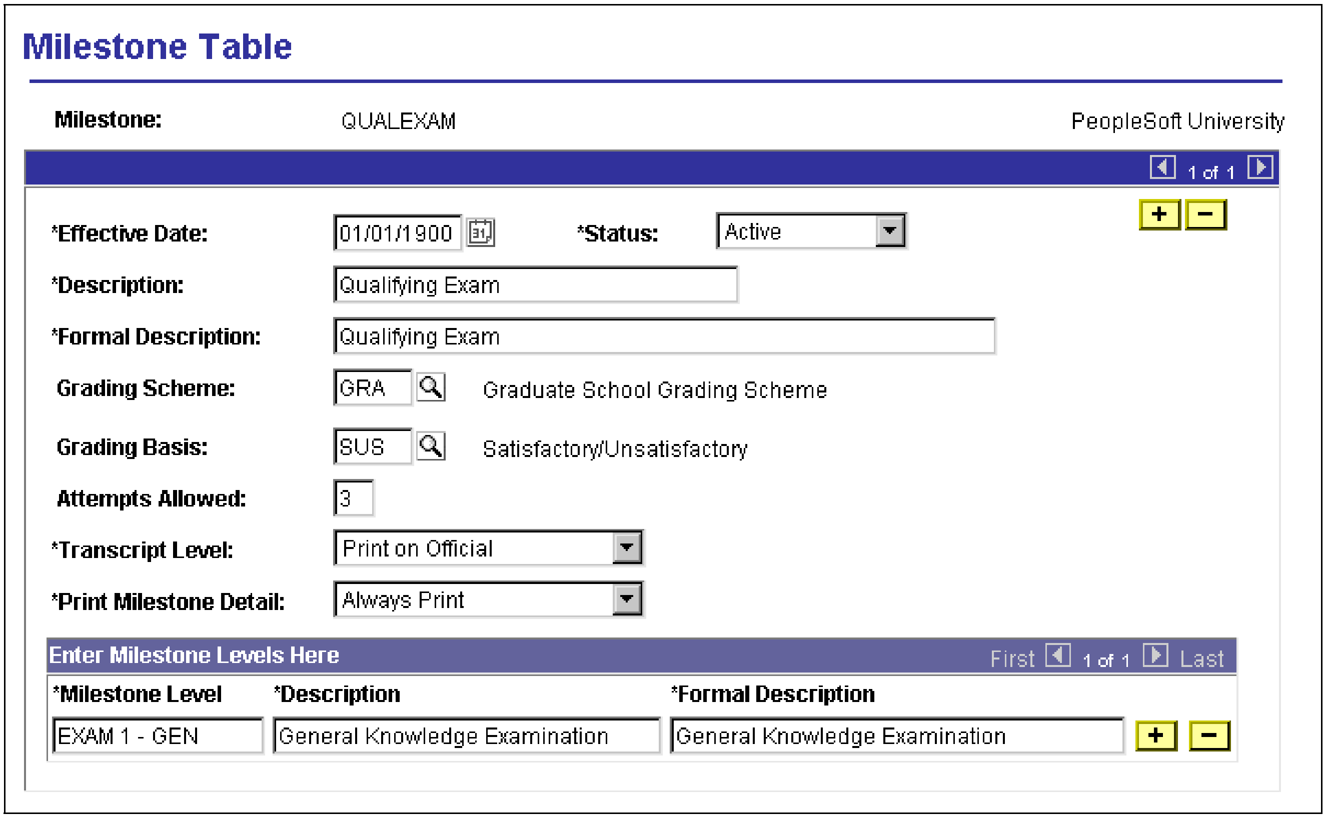
Chapter 31, "Tracking Student Data," Tracking Milestones, page 703

Pages Used to Set Up Milestones

Page Name	Object Name	Navigation	Usage
Milestone Table	MILESTONE_TBL	• Design Student Administration, Define Student Records, Setup, Milestone Table • Manage Student Records, Manage Academic Records, Setup, Milestone Table	Define milestone codes and their grading bases, and define the levels of the milestone.
Milestone Templates	MILESTONE_TMPL	• Design Student Administration, Define Student Records, Setup, Milestone Templates • Manage Student Records, Manage Academic Records, Setup, Milestone Templates	Create milestone templates to reduce data entry later on.

Defining Milestone Codes

Access the Milestone Table page.



Milestone Table page

Note. To inactivate a milestone code, remove that code from every milestone template in addition to entering a status of Inactive on this page.

Grading Scheme

Select a grading scheme for the milestone. When you enter the milestone on a student's record, you can override the grading scheme.

Grading Basis

Select a grading basis for the milestone. Link grading bases to grading schemes on the Grading Scheme Table page. You can override this value on individual student records.

Attempts Allowed

Enter the number of attempts students can make at completing the milestone. This field is a default data entry and tracking aid. You can override the attempts allowed on individual student records.

Print Milestone Detail

Select a print milestone detail to indicate if the milestone detail information will be displayed on the transcript. Milestone detail information includes the details on the Student Milestones page.

Milestone Level

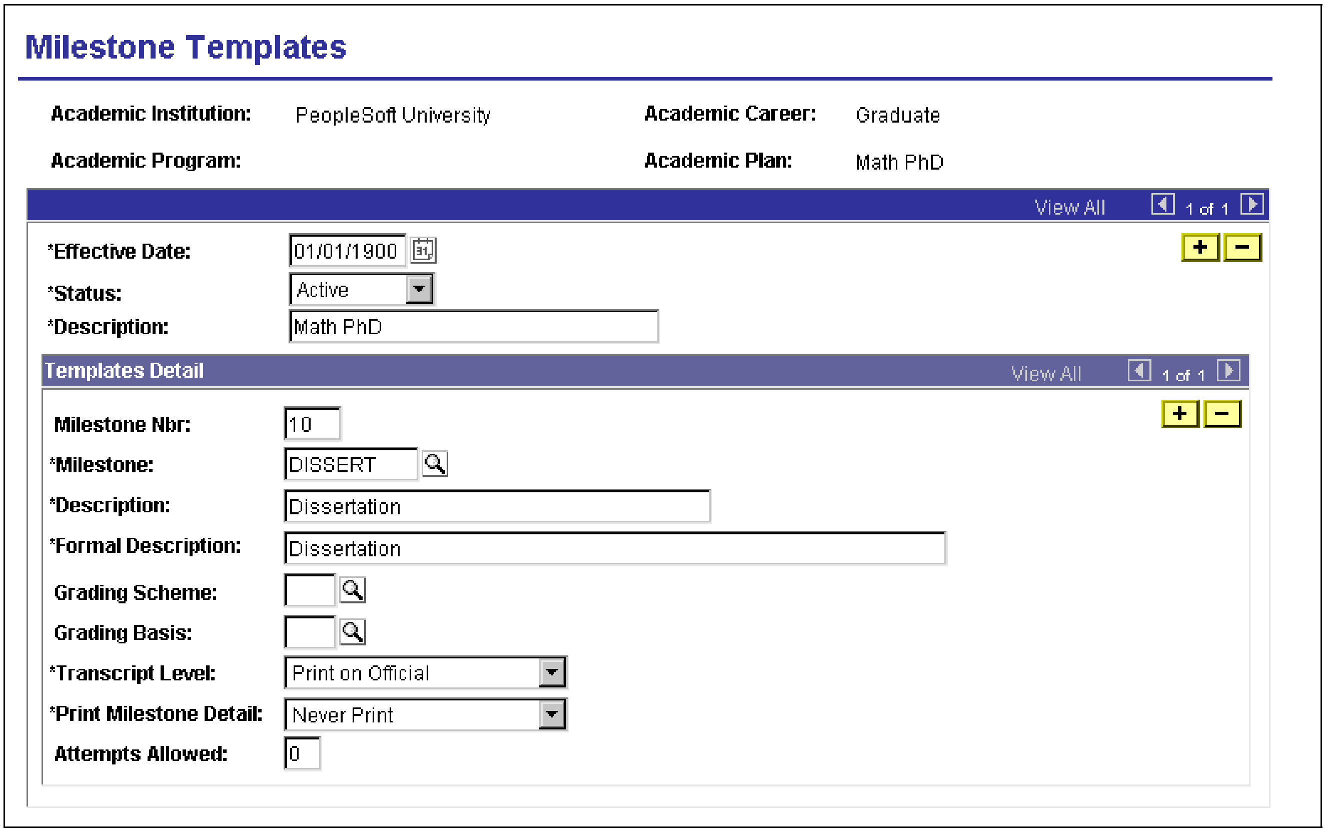
Enter an alphanumeric code that identifies this milestone level code. You use milestone levels for detailing the progress of a milestone and for informational purposes. For example, you might define a milestone of *Written Comprehensive Exams* for doctoral students and have four levels within that milestone to designate the four sets of comprehensives required.

See Also

Chapter 13, "Setting Up Transcripts," page 255

Creating Milestone Templates

Access the Milestone Templates page.



Milestone Templates page

If you link a milestone template to only an academic institution and academic career, it can be used as a template for any academic program or plan. If you want a milestone template to be restricted to a specific academic program or plan, enter the program and plan in the search dialog box. When you link milestones to academic programs you are making a template, not a permanent link. This information appears in the Student Milestones component when you copy the template to the student's record.

Milestone Nbr (milestone number)	Enter a milestone number to define the sequence of multiple milestones within a template. The sequence number is for your information only. In our example, sequence numbers for each milestone increase by ten. You can sequence these however you want.
Milestone	Select a milestone code.
Grading Scheme	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.
Grading Basis	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.

Print Milestone Detail The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.

Attempts Allowed The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.

Setting Up Extracurricular Activities

You can track both internal and external extracurricular activities for individuals.

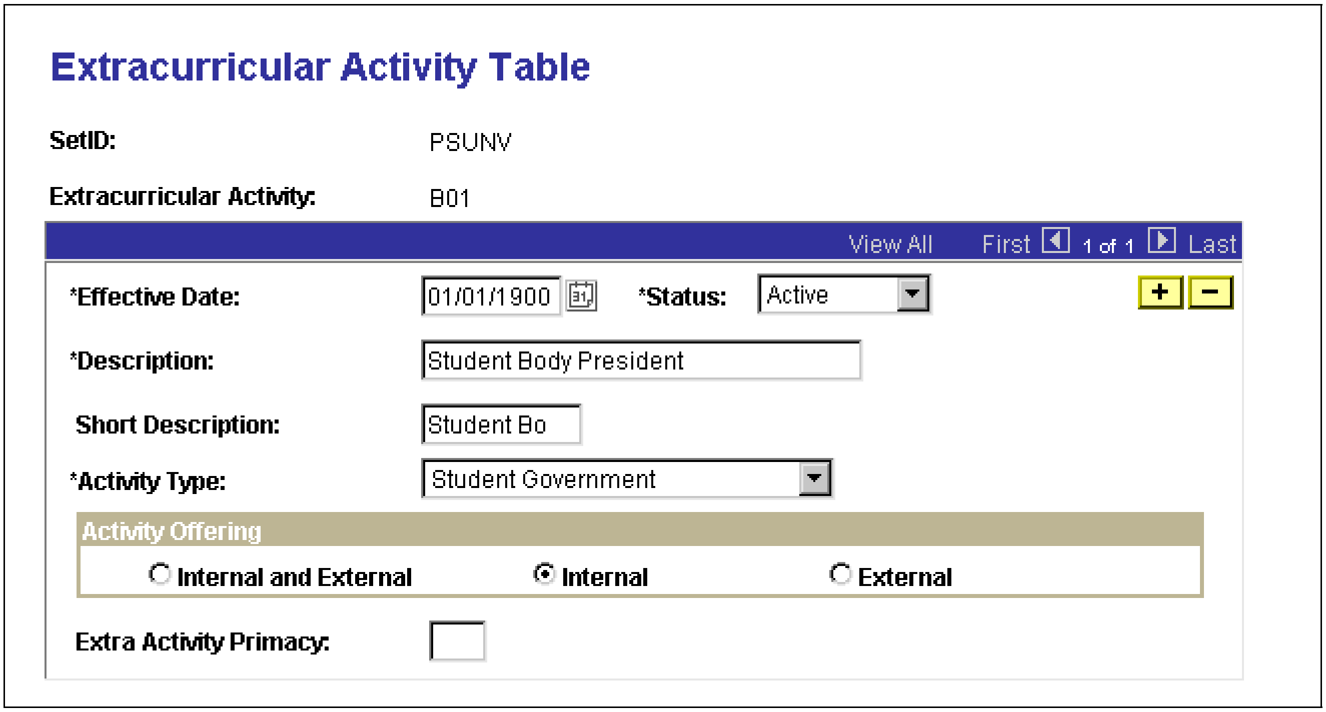
This section discusses how to set up extracurricular activity codes for this purpose. You will later use the Extracurricular Activity page to link these codes to students.

Page Used to Set Up Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	• Design Student Administration, Define Campus Community, Setup, Extracurricular Activity Tbl • Manage Student Records, Track Student Careers, Setup, Extracurricular Activity Tbl	Set up extracurricular activity codes, and define the primacy of the extracurricular activities for your setID.

Setting up Extracurricular Activity Codes

Access the Extracurricular Activity Table page.



Extracurricular Activity Table page

Activity Type

Select the type of activity that you are entering. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Athletics, Club, Employment, Music, Other, Publications, Student Government, Theater,* and *Volunteer.*

Internal and External

Select this option to indicate that this extracurricular activity exists at your institution as well as at external institutions.

Internal

Select this option to indicate that this extracurricular activity exists at your institution only.

External

Select this option to indicate that this extracurricular activity exists at external institutions only.

Extra Activity Primacy

Enter the primacy number for this extracurricular activity. When you run the Consolidate Academic Statistics process it searches students' extracurricular activity records for only the *athlete* extracurricular activity. The *athlete* extracurricular activity is delivered with your system. It should not be modified in any way because it has code attached to it. If the Consolidate Academic Statistics process finds multiple *athlete* records for a student, it writes the one with the lowest primacy number to the student's consolidated statistics record.

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," page 821

Managing Student Groups

Student groups enable you to set up groups (such as *Athlete* or *Freshman)* and assign these groups to individuals. Then you can perform actions (such as run reports and processes) on a group, which affects all of the individuals in the group.

This section discusses how to set up student groups. You will later use the Student Groups page to assign student groups to students.

Page Used to Manage Student Groups

Page Name	Object Name	Navigation	Usage
Student Group Table	STDNT_GROUP_TABLE	• Design Student Administration, Define Student Administration, Setup, Student Group Table • Design Student Administration, Define Student Records, Setup, Student Group Table	Set up student groups (such as *Athletes* and *Resident Assistants*) by entering the effective date, status, and description of each student group.

Setting Up Student Attributes

This section provides an overview of student attributes and discusses how to:

- Define student attribute codes on the Student Attribute Table page.
- Define student attribute values on the Student Attribute Value Table page.

See Also

Chapter 31, "Tracking Student Data," Tracking Student Attributes, page 710

Understanding Student Attributes

Although student groups let you track attributes such as participation in clubs, sports, and student government, you might need an additional, more flexible structure that lets you track the attributes of your students based on their career and program. To meet this need, use the Student Attributes feature.

The Student Attributes feature lets you assign all sorts of attributes to a student within an academic career or program and group together the students with similar student attributes. You can then track and report on the student attribute data. For instance, you can track students that begin their education at the same time as a single cohort by creating a student attribute for undergraduate incoming freshmen and attaching the attribute to the records of these students. You can then use the data for federal reporting and also for institutional research purposes to gain information about the type of students that you have in a particular cohort, such as a student's typical course load or how long it takes a student to complete his or her program and graduate.

You can create multiple attributes and multiple attribute values within a single attribute. Then when you assign these attributes to students, you can attach to their records multiple attributes and multiple values within each student attribute. With this flexibility, your students can belong to as many cohorts as necessary to meet your tracking and reporting needs. You can assign these attributes to students at any time, even during the recruiting and admissions processes because the attributes roll from PeopleSoft Recruiting and Admissions to PeopleSoft Student Records as part of the student's academic career and academic program.

Use the Student Attribute Table component to define different student attributes and student attribute values. You can create broad student attributes for entire academic careers, then attach single student attribute values to each of those careers. For example, you can create a student attribute for undergraduate students called *Student Cohort,* you can then create different values for *Student Cohort* on the Student Attribute Value Table page (such as *Fall 1998 Entry Class, Fall 1999 Entry Class,* and *Fall 2000 Entry Class*). In addition, you can create smaller student attributes for individual academic programs. You can also define student attribute values for plans and sub-plans and group them under a specific academic program.

Once you have defined all your student attributes and student attribute values, use the Student Attributes page to attach these attributes and attribute values to individual students, and build reports on the data so you can track statistics such as how many students in a particular cohort graduated in three years, four years, and five years, and how heavy their course load was. The system also reports a primary student attribute as part of the Consolidate Academic Statistics process.

Pages Used to Set Up Student Attributes

Page Name	Object Name	Navigation	Usage
Student Attribute Table	STDNT_ATTR_TBL	Design Student Administration, Define Student Records, Setup, Student Attribute Table, Student Attributes Table	Define the various student attributes your institution uses for tracking and reporting on different cohorts.
Student Attribute Value Table	STDNT_ATTR_TBL	Design Student Administration, Define Student Records, Setup, Student Attribute Table, Student Attributes Table	Define the values associated with a particular student attribute.

Defining Student Attribute Codes

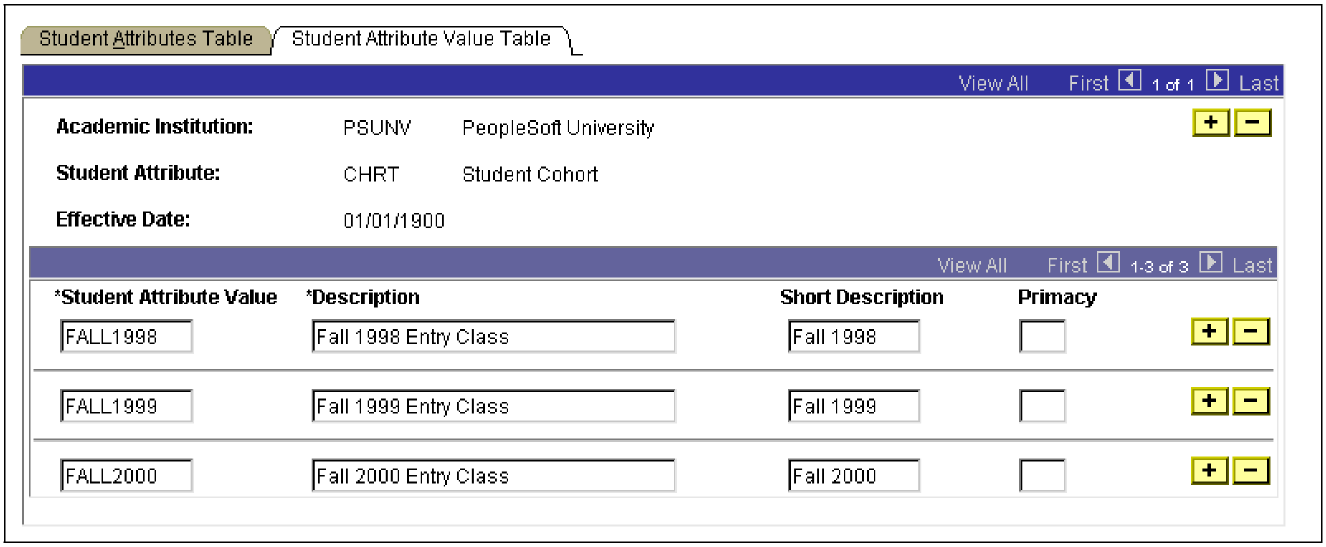
Access the Student Attribute Table page.

Academic Career Select the academic career to which the student attribute is linked. (Optional)

Academic Program Select the academic program to which the student attribute is linked. (Optional)

Defining Student Attribute Values

Access the Student Attribute Value Table page.



Student Attribute Value Table page

Student Attribute Value Enter an alphanumeric code that identifies this student attribute value.

Primacy Enter the primacy number for the student attribute. The system uses the number to determine the primary student attribute value it uses when you extract data to report on cohorts. This primacy value has no relation to Financial Aid primacy. The lowest number takes precedence.

Note. Always assign the lowest primacy number to the student attribute value that you want to use for federal reporting of this student attribute.

CHAPTER 10

Setting Up Interoperability for Learning Management Systems

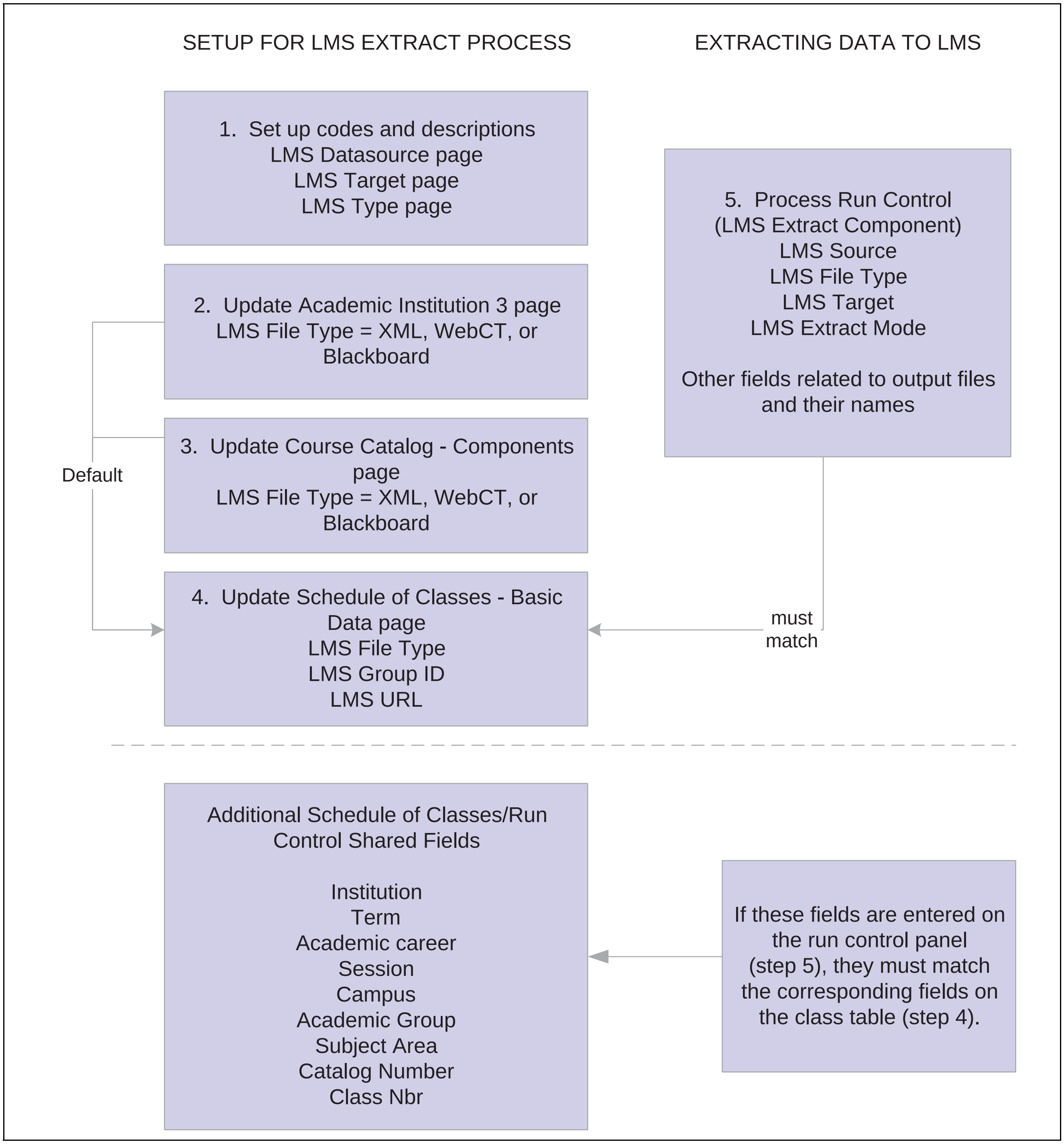
This chapter provides an overview of how the Learning Management System (LMS) setup tables interact with the run control pages to create an extract, and discusses how to set up LMS values and default options.

See Also

Chapter 32, "Managing Interoperability for Learning Management Systems," page 717

Understanding LMS Setup

The following diagram illustrates how the setup tables interact with the run control pages to create an extract.



Overview of the LMS setup and run control extract process

Before You Begin

As you prepare to set up the LMS feature, PeopleSoft suggests that you answer the following business questions. If you answer these questions in advance, setup on all of the pages is more efficient:

- What type of LMS do you use, XML V1.01, Blackboard CourseInfo 4.0, or WebCT API Input Format?

  Current functionality requires that you select and use only one of these types for your institution. This feature does not support the concurrent use of multiple LMS types.

- If personal data is something that you need to extract, what phone type and address usage do you want to extract for the person objects?

  In addition, if you selected Blackboard CourseInfo in the previous question, all persons whom you extract must have electronic addresses in the system.

- Will all of your classes need to be available for extract to an LMS system?

  If yes, then you only need to enter an LMS file type on the Academic Institution 3 page one time. Every time you schedule a new class, the Schedule of Classes - Basic Data page uses to the LMS file type specified on the Academic Institution 3 page and the system autogenerates an LMS group ID.

  If no, then you need to go into each course on the Course Catalog - Components page and specify the appropriate LMS file type. When you schedule classes, the system uses the value specified here instead of the file type specified on the Academic Institution 3 page.

- Do you want students to have a direct link to the class's website from the student's self-service PeopleSoft student study list?

  If so, you need to create a URL for each class and enter it on the Schedule of Classes - Basic Data page.

- What URL will you create for each class?

  If you do not currently have URL's in place, think of a naming convention that works for you, your instructors, and your students.

- If you plan to use XML V1.01, you need to create a Data source code and a description for every possible extract source.

  How do you want to name your extract source information? Do you typically extract from one small department or school at a time? Or, do you extract a large group of data for a term at a time?

  In addition, you need to create Target codes and descriptions for all of your targets (for example, the PSUNV/LMS shared server, or the School of Law server). Also, you need to create codes and descriptions for all of the different Types of extract processes you may run. These naming conventions are used as part of each XML V1.01 extract, and are useful tracking tools.

Setting Up LMS Values and Default Options

Now that you have answered the business questions and reviewed the object data definitions, you can set up LMS values and extract options in your system.

Here's how to set up LMS extract data:

1. Set up the following data if you plan to use a file type of XML V1.01 (otherwise, skip this step):

   LMS datasource codes and descriptions

   LMS target codes and descriptions

   LMS type codes and descriptions

2. Specify LMS options on the Academic Institution 3 page if you want all new classes at your institution to automatically be in a particular LMS file type.

   If you prefer that LMS file type values automatically come from a lower level (such as the course catalog or schedule of classes), skip this step. If you skip this step, the system uses the LMS file type specified in step three or four each time you schedule a new class.

3. Specify LMS options on the Course Catalog - Components page if you want all newly scheduled classes at your institution to automatically be in the LMS File Type on the class's respective Course Catalog - Components page.

   This step is optional. If you skip this step, the system uses the LMS file type specified in step two or four each time you schedule a new class.

4. Specify LMS File Type (if different than the default setting from step two or three), group ID, and URL information on the Schedule of Classes - Basic Data page, or on the Schedule New Course - Basic Data page.

   The URL address must be complete (for example, include "http://.")

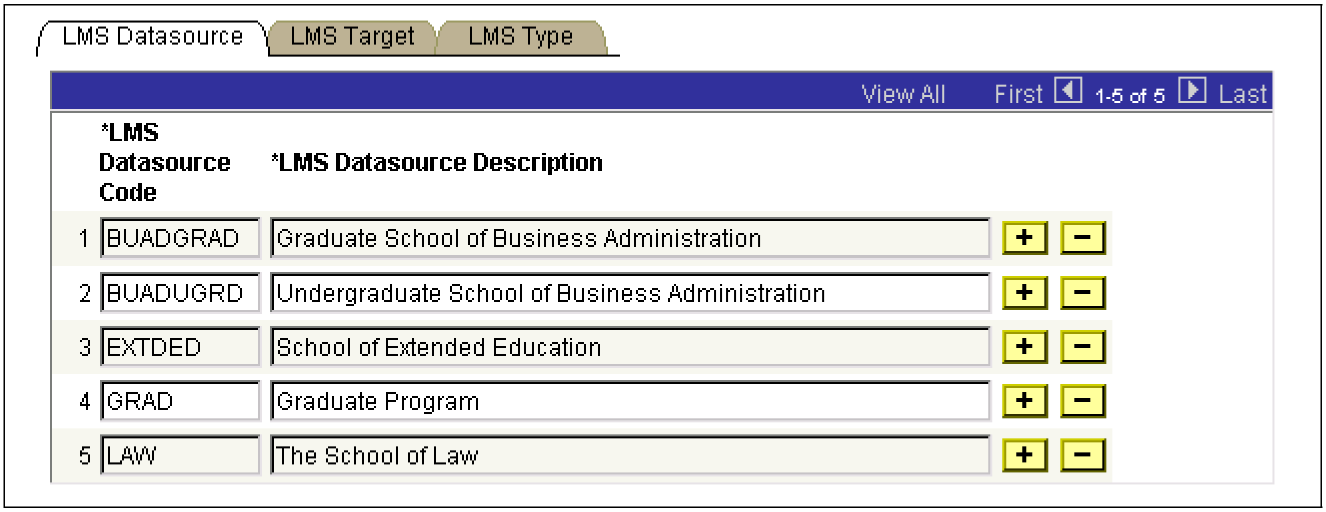
5. Populate object data by scheduling classes, assigning instructors, enrolling students, and so on.

Pages Used to Set Up LMS Values and Default Options

Page Name	Object Name	Navigation	Usage
LMS Datasource	LMS_DATASOURCE	Manage Student Records, Manage Academic Records, Setup, LMS Setup, LMS Datasource	Set up codes and descriptions for potential extract sources.
LMS Target	LMS_TARGET	Manage Student Records, Manage Academic Records, Setup, LMS Setup, LMS Target	Set up codes and descriptions for potential extract targets.
LMS Type	LMS_TYPE	Manage Student Records, Manage Academic Records, Setup, LMS Setup, LMS Type	Set up codes and descriptions for potential extract types.
Academic Institution 3	INSTITUTION_TABLE3	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 3	Define LMS file type default values and personal data extract parameters.
Components	CRSE_CATALOG_CMPNT	Manage Student Records, Establish Courses, Use, Course Catalog, Components	Enter LMS type values on a course by course basis.
Basic Data	CLASS_ENTRY	• Manage Student Records, Establish Courses, Use, Schedule New Course, Basic Data • Manage Student Records, Establish Courses, Use, Schedule of Classes, Basic Data	Enter LMS type values on a class component basis.

Setting Up LMS Datasource Values

Access the LMS Datasource page.



LMS Datasource page

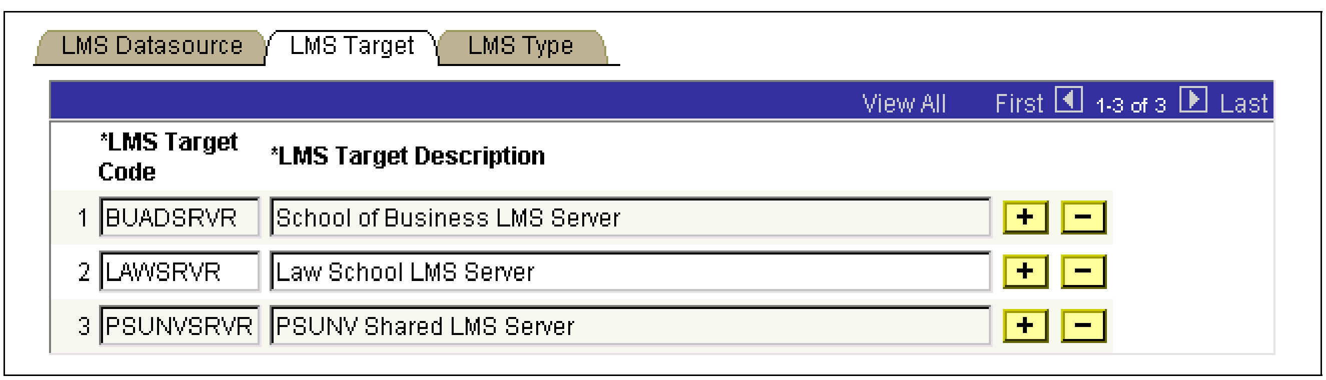
LMS datasource codes and descriptions are required on the LMS Extract page as part of your run control parameters if you run the extract process with an LMS type of XML V1.01. If you run the extract process with an LMS type of Blackboard CourseInfo 4 or WebCT API Input Format, this setup is not required.

LMS Datasource Code and **LMS Datasource Description**

Enter an LMS datasource code and corresponding LMS datasource description for all valid data sources. The data source is an identifier for the site generating the XML file and is used in the properties object (header record). For XML types, the LMS datasource code must be entered at runtime on the LMS Extract - Setup page.

Setting Up LMS Target Values

Access the LMS Target page.



LMS Target page

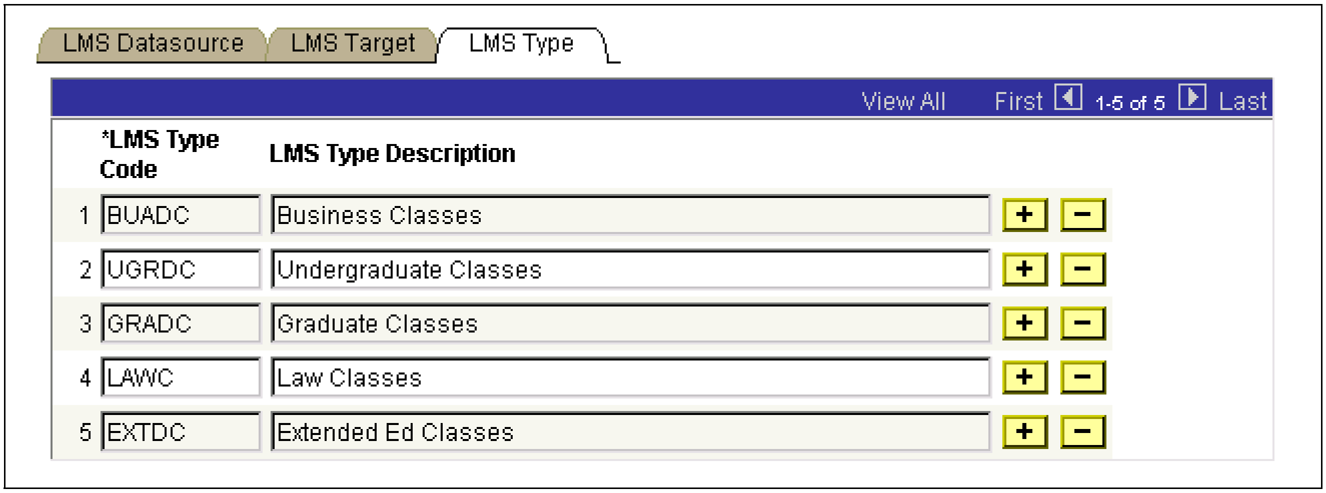
LMS target code and description information is required on the LMS Extract - Setup page as part of your run control parameters if you run the extract process with an LMS type of XML V1.01. If you run the extract process with an LMS type of Blackboard CourseInfo 4 or WebCT API Input Format, this setup is not required.

LMS Target Code and **LMS Target Description**

Enter an LMS target code and corresponding LMS target description for all valid recipients of the XML file(s). The target code is an identifier for the site receiving the XML file and is used in the properties object (header record). For XML types, the LMS target code is entered at runtime on the LMS Extract page.

Setting Up LMS Type Values

Access the LMS Type page.



LMS Type page

LMS type and description information is required on the LMS Extract - Setup page as part of your run control parameters if you run the extract process with an LMS type of XML V1.01. If you run the extract process with an LMS type of Blackboard CourseInfo 4 or WebCT API Input Format, this setup is not required.

LMS Type Code and **LMS Type Description**

Enter an LMS type code and a corresponding LMS type description to specify the nature of any extract you may perform with this type. The type code is an identifier for the site receiving the XML file and is used in the properties object (header record). For XML types, the LMS type code is entered at runtime on the LMS Extract - Setup page.

Defining LMS Default Options for Your Institution

Use the LMS Options group box on the Academic Institution Table 3 page to specify LMS file type default values and personal data extract parameters.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Designing Your Academic Structure,” Setting Additional Institution Defaults and Options

Defining LMS Default Options for Course Components

If you have not specified an LMS file type on the Academic Institution 3 page, and you want to enter your LMS type values on a course by course basis, use the Course Catalog - Components page to do so.

See Also

Chapter 4, “Setting Up the Course Catalog,” Defining Course Components, page 82

Defining LMS Options for Classes

If you have not specified an LMS file type on the Academic Institution 3 page or on the Course Catalog - Components page, and you want to enter your LMS type values on a class component basis, use the Schedule of Classes - Basic Data page to do so. You can also specify an LMS group ID and an LMS URL on this page.

See Also

Chapter 17, “Managing the Schedule of Classes,” Defining Basic Data for Class Sections, page 353

CHAPTER 11

Setting Up Grading

This chapter provides an overview of the setup required for grading, and discusses how to set up your system for grading.

See Also

Chapter 33, “Grading Students,” page 727

PeopleSoft 8 SP1 Gradebook PeopleBook, “Using the Self-Service Gradebook”

Understanding Grade Preparation

PeopleSoft Student Records provides a variety of grade-related features. From institution and career-based rules, to repeat schemes, grade rosters, grade change audits, and midterm deficiency analysis, you can use the different grade-related components to set up and manage grading processes.

Grade bases comprise individual grades, and grade schemes comprise grade bases. Typically, grade schemes are unique for each career in your institution. Grade schemes are not manually assigned to individual classes. Instead, the system dynamically matches grade schemes assigned to one career with classes of the same career.

Before you can actually grade students, you must define all possible grading schemes for all careers. Again, you can have different grading schemes for different careers. Within each grading scheme, you define all valid grade bases, grades, and grade related detail.

In addition, the system enables you to convert grades from one grading scheme to another. We call this grade-basis mapping feature our “intelligent grade basis exception table.” For example, when an undergraduate student enrolls in a graduate course (and the graduate course is associated with a graduate grading scheme), you might not want to grade the student according to the graduate grade scheme. Rather, you set up exception rules so that the system reroutes the student’s grade scheme to the appropriate undergraduate grade scheme. On the Grading Basis Exception Rule page, you define all possible exception scenarios that the system must handle. For example, you can set up a rule that requires the system to convert a graduate grading scheme into an undergraduate grading scheme. This way, you ensure that grade schemes are appropriate for the student, based on the student’s career (rather than the career of the class). Setting up exception rules is optional.

Finally, when all of your grade data is set up, and instructors are ready to enter grades, you must generate the grade rosters. You can generate rosters on an individual class basis, or in batch. Generating the rosters is a required, final step in making the rosters available for grade entry.

Setting Up Grading

Here's how to set up grading:

1. Define grade basis values in Application Designer.
2. Define grading schemes on the Grading Scheme Table page.
3. (Optional) Define grade basis exceptions on the Grading Basis Exception Rule page.
4. (Optional) Run the Grade Basis Exception Report to review active grade basis exception mapping rules and their details.
5. Generate grade rosters on either the Grade Roster Type page or the Grade Roster Generator page.

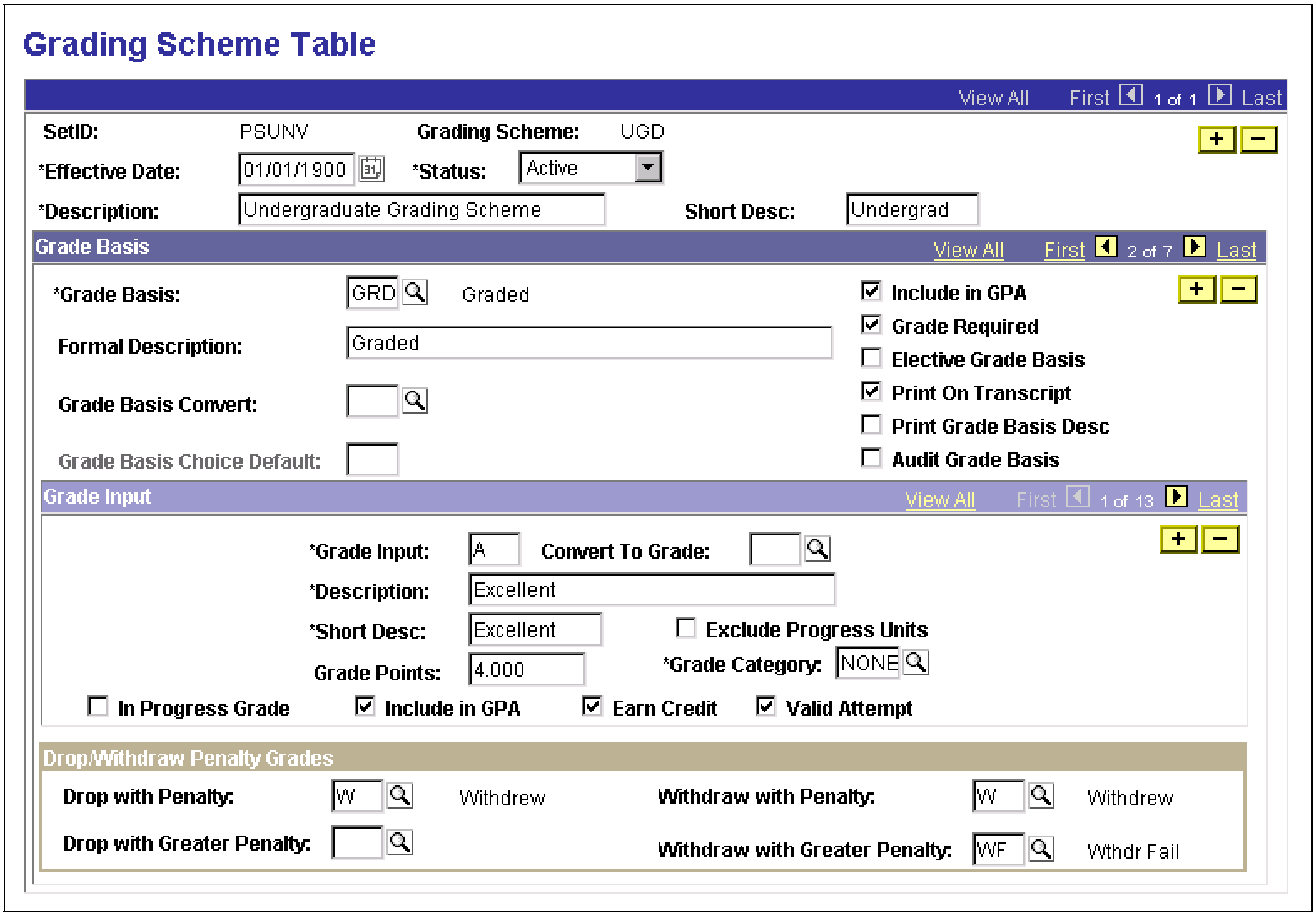
Pages Used to Set Up Grading

Page Name	Object Name	Navigation	Usage
Grading Scheme Table	GRADING_SCHEME_TBL	• Design Student Administration, Define Student Administration, Setup, Grading Scheme Table, Grading Scheme Table • Manage Student Records, Establish Courses, Setup, Grading Scheme Table, Grading Scheme Table	Define all valid grading schemes. Enter each grading scheme and the associated grades on this page.
Grading Basis Exception Rule	GRD_BASE_EXCEPTION	Design Student Administration, Define Student Records, Setup, Grading Basis Exception Rule, Grading Basis Exception Rule	Map typical student-requested grade bases to existing grading basis rules.
Grade Basis Exception	RUNCTL_SRGBEXCPT	Design Student Administration, Define Student Records, Report, Grade Basis Exception, Grade Basis Exception	Run reports that display active grade basis exception mapping rules and their details.

Page Name	Object Name	Navigation	Usage
Grade Roster Type	GRADE_ROSTER_TYPE	Manage Student Records, Establish Courses, Use, Grade Roster, Grade Roster Type	Define grade rosters on a class-by-class basis. To print the grade roster, use the Grade Roster Print page. Prerequisite: If you want to use blind grading for this class, select the Use Blind Grading check box on the Class Associations page. If you prefer, select the Use Blind Grading check box on the Course Catalog Offerings page. Then the system populates the use Blind Grading check box each time you create a class association.
Grade Roster Generator	RUNCTL_GRD_ROSTER	Manage Student Records, Establish Courses, Process, Grade Roster Generator	Generate grade rosters for each term and session by subject area or by academic organization. To print the grade rosters, use the Grade Roster Print page. If you want to use blind grading for this class, select the Use Blind Grading check box on the Class Associations page. If you prefer, select the Use Blind Grading check box on the Course Catalog Offerings page so that the system uses blind grading each time you schedule the class. The system then populates the use Blind Grading check box each time that you create a class association.

Defining Grading Schemes

Access the Grading Scheme Table page.



Grading Scheme Table page

Grading schemes are linked to academic careers and academic programs.

Status — Select a status for this grading scheme. Select *Active* when adding a new grading scheme. Use the *Inactive* option only if your institution no longer uses this grading scheme.

Description — Enter a description for the grading scheme.

Short Desc (short description) — Enter a short description for the grading scheme.

Grade Basis — Select a grade basis. Grade basis values are entered into your system as translate values, which you can modify.

Formal Description — Enter a formal description of the grading basis.

Grade Basis Convert — Enter a grade basis convert value to use grades that are associated with another grading basis. If you enter a value in this field, the Grade Input group box becomes unavailable. This is because the grade basis references the grade input data of another grade basis.

Grade Basis Choice Default — If you select the Elective Grade Basis check box, you can enter a grade basis choice default to specify the default grade basis for this grading scheme. In addition, you can enter all of the possible grading basis choices in the fields that become available in the bottom third of the page. The system uses the default value during enrollment. If students have the option to select other grade bases, they can do so at enrollment time.

Include in GPA (include in grade point average)	Select to include grades from this grading scheme in grade point average (GPA) calculations.
Grade Required	Select to specify this grade basis as required, for purposes of the Grade Review - Transcript Release process. When you evaluate students using the Grade Review process, those classes in which the students are enrolled with a *required* grade basis must have all of their grades, otherwise a transcript does not generate for the student. This is a way for you to prevent transcripts from printing until all of a student's term grades are posted. See Chapter 35, "Producing Transcripts," Creating Batch Transcript Requests, page 798.
Elective Grade Basis	Select to input the grading bases from which the student may select during enrollment.
Print on Transcript	Select to display, on the transcript, classes that are graded with this grade basis. If you do not select this option, all class data for courses that have grades that are from this grade basis do *not* appear on the transcript.
Print Grade Basis Desc (print grade basis description)	Select to have the grade basis formal description appear on the transcript.
Audit Grade Basis	Select to indicate that the grading scheme is audit-only. If you select this check box, the following Grade Input group box check boxes become unavailable: In Progress Grade, Include in GPA, and Earn Credit.
Grade Input	If you enter a grade basis and clear the Elective Grade Basis check box, or if you do not enter a value in the Grade Basis Convert field, the Grade Input field becomes available. Enter all of the valid grade values for the grading scheme in the Grade Input field. Add rows as necessary.
Convert to Grade	When you post grades, the system converts the originally entered grade to the convert to grade if a value exists in the Convert to Grade field. This field is optional. The convert to grade must be within the grading scheme that you are currently defining.
Exclude Progress Units	Select to have the system exclude this grade from progress units. For example, you would select this check box for a *W* or withdrawal grade.
Description	Enter a description for the grade input.
Short Desc (short description)	Enter a short description for the grade input.
Grade Points	Enter the grade points for the grade input. The system uses these grade points, in conjunction with the units attempted for the class, when it calculates GPA.

In Progress Grade Select to indicate that this is an in-progress type of grade. A typical example of an in-progress grade would be an Incomplete.

Include in GPA (include in grade point average) Select to include the grade you specify in GPA calculations. An example of when you would *not* select this check box is for a *Pass* grade.

Earn Credit Select to specify that the grade can be counted toward course and academic advising credit.

Grade Category Use this field to give a grade additional identity. You can assign a grade category to a particular grade or group of grades, then use these assignments for advanced advising analysis purposes, such as requisite checking or academic advising limits. The system populates the Grade Category field with *None.*

A typical example of a grade category is *Pass* or *Transfer Pass.* You can use academic advising to limit the number of classes with grade categories of *Transfer Pass* that count toward degree requirements. Select from a list of grade categories defined by your institution.

Grade categories are defined on the Grade Category Table page.

Valid Attempt Select to mark each grade value as representing a valid course attempt. PeopleSoft Academic Advisement uses this setting to distinguish between grades for valid course attempts (A, B, C, D, F, and so forth) and grades for invalid course attempts (AU, W, and so forth).

If you select this check box, Academic Advisement can distinguish between valid and invalid course attempts when the values in the Units Attempted, Earned Credit, and GPA fields are the same.

See the following table for an example.

Course	Grade	Units Attempted	Earned Credit	GPA	Valid Attempt
English 101	W (user defined)	3.00	0.00	0.00	No
English 101	F	3.00	0.00	0.00	Yes

Note. The PeopleSoft Academic Advisement application considers class attempts that have no grade as valid attempts.

Drop/Withdraw Penalty Grades

When processing drops during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you do not define penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define on the Session Calendar1 page (for withdraw grades) and the Session Calendar 2 page (for drop grades). We strongly suggest that you define penalty grades at the grade basis level. This ensures that students receive penalty grades specific to their intended grade basis for the class, and not the penalty grade that is assigned to all students in the session, regardless of whether the penalty grade is from the student's original grade basis or not.

For example when you drop a student from a class where the stdnt_enrl.grading_basis_enrl = AUD during Drop With Greater Penalty, and there is a drop with greater penalty grade in the GRADE_TBL for AUD, the system assigns the drop with greater penalty grade to the student. If no drop with greater penalty grade exists at the grade table level for an AUD grade basis, the system instead uses the grading basis and grade from the ACAD_CALSES_TBL (as defined on the Session Calendar2 page.)

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Defining Traditional Academic Calendars," Setting Up Session Cancellation and Withdrawal Dates.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates.

Drop with Penalty Select the penalty grade that students enrolled with this grade basis will receive for a class if the student drops the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline. The grade for the class will appear on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

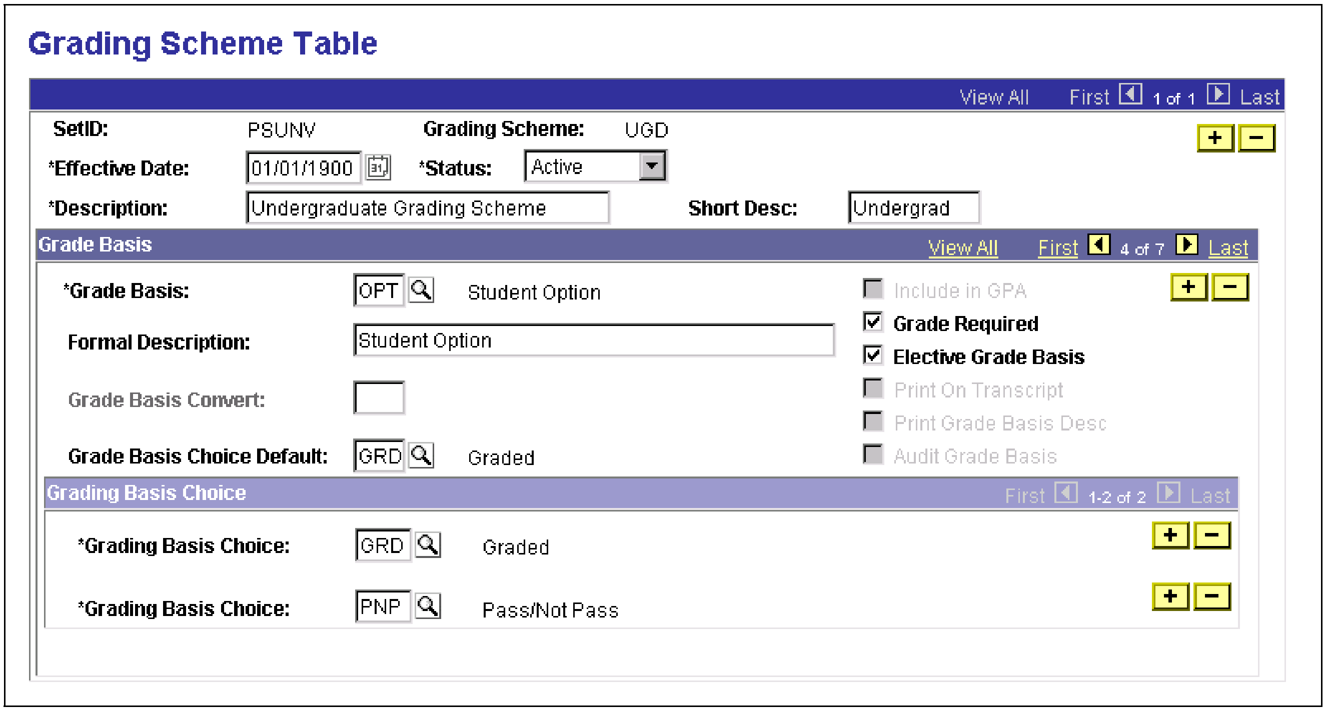
Drop with Greater Penalty Select the grade that students enrolled with this grade basis will receive for a class if the student drops the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline. The grade for the class will appear on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Withdraw with Penalty Select the grade that students enrolled with this grade basis will receive for a class if the student withdraws after the withdraw-without-penalty deadline but on or before the withdraw with penalty deadline. The grade for the class will appear on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Withdraw with Greater Penalty Select the grade that students enrolled with this grade basis will receive for a class if the student withdraws after the withdraw-with-penalty deadline but on or before the withdraw-with-greater penalty deadline. The grade for the class will appear on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Grade Scheme Example - Using an Elective Grading Basis

Select the Elective Grade Basis check box for grade bases that permit students to choose different modes of grading for a class. Before you select this check box, define all of your grading basis choices.



Elective grade basis example, Grading Scheme Table page (GRADING_SCHEME_TBL)

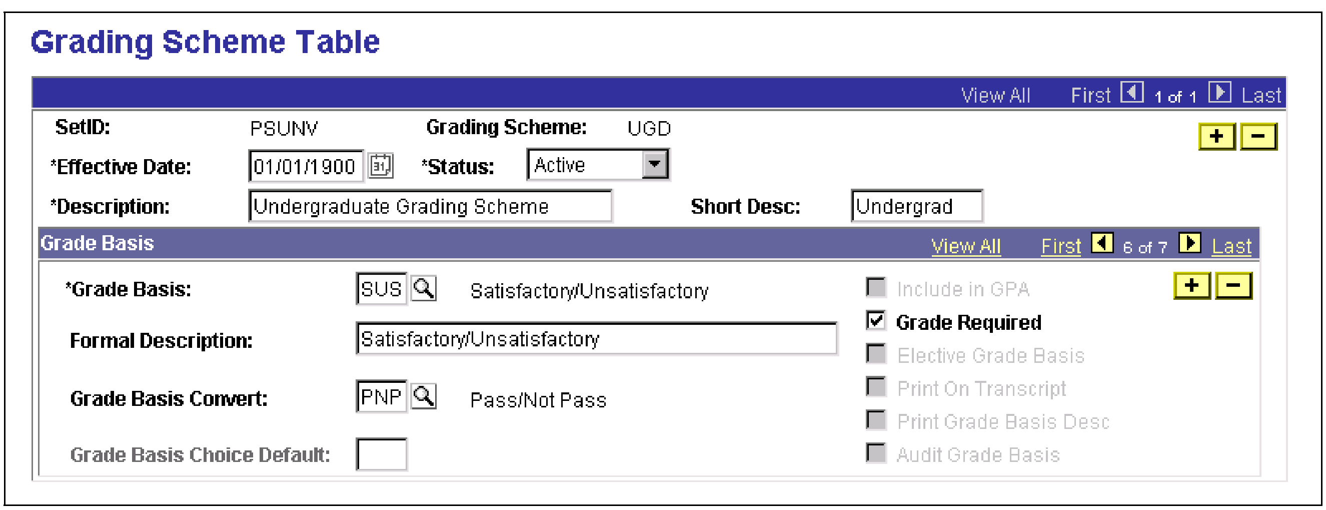
On this page, select the following:

- The Elective Grade Basis check box.

  The system displays the Grading Basis Choice scroll area.
- All valid possible grading basis choices from which a student can choose for a class that is offered with this Grade Basis of *OPT*.

Grade Scheme Example - Converting Grade Basis

Enter a grade basis in the Grade Basis Convert field for *Satisfactory/Unsatisfactory* (*SUS*) grades to convert to your new and preferred grade basis of *Pass/Not Pass* (*PNP*).



Converting grade bases example, Grading Scheme Table page (GRADING_SCHEME_TBL)

On this page, select the grade basis value in the Grade Basis Convert field. All courses that have a grade basis of *SUS* will convert to a grade basis of *PNP.*

Grade Scheme Example - Setting Up a Requirement That References a Grade Category

At PSUNV, the maximum number of Pass grades that can apply towards a Bachelor's degree is 24 units. From these 24 units, no more than 6 units can be from another institution. To establish this academic advising limit on Pass grades, create two grade categories on the Grade Category Table page: *PASS* for Internal Pass and *TXFR* for Transfer Pass. Then on the Grading Scheme Table page, assign to the grade *P* the grade category of *PASS* and assign to the grade *T* the grade category of *TXFR.*

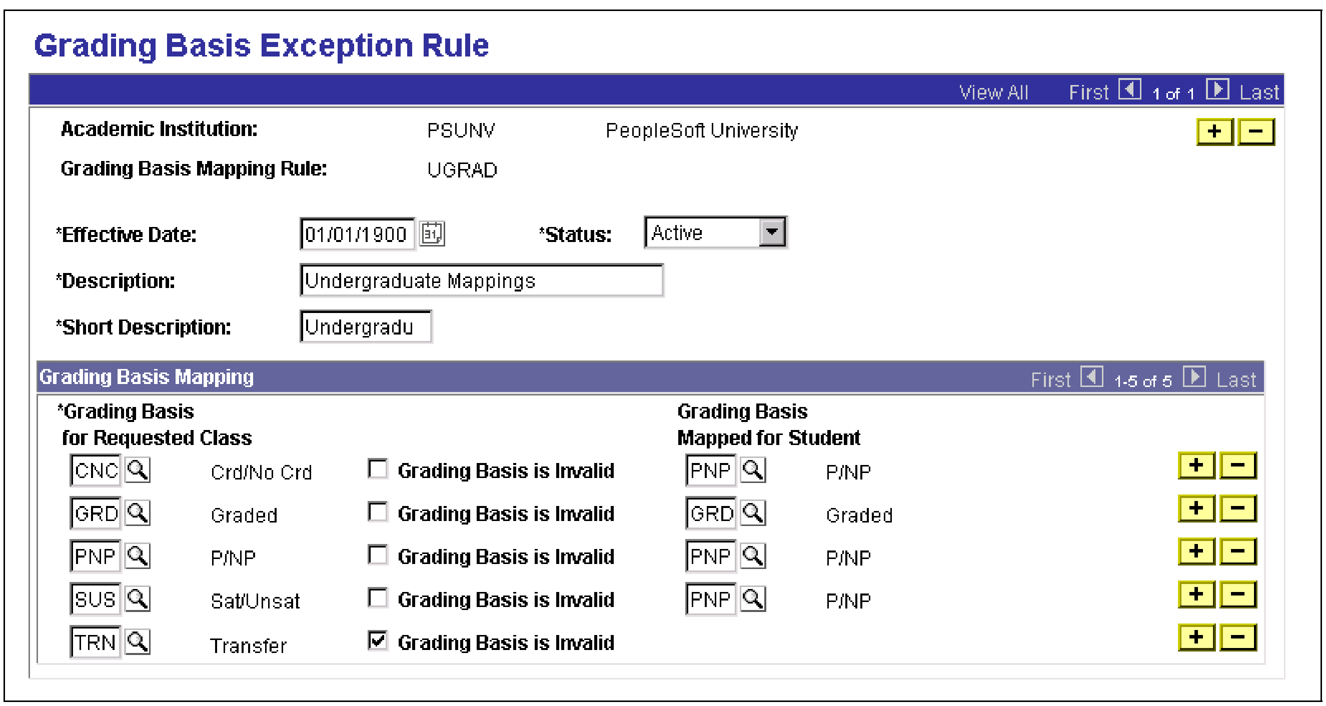
In PeopleSoft Academic Advisement, create an academic requirement that is a global limit. Its first requirement line points to a derived list of all courses on a student's transcript with a grade that has a grade category of *PASS, unioned* with a derived list of all courses on a student's transcript with a grade category of *TXFR.* The requirement line limit allows a maximum of 24 units and maximum of 999 courses (the system enforces the lower of these). Create a second requirement line (in the same academic requirement) that is also a global limit. It points to a derived list of all courses on a student's transcript with a grade that has a grade category of *TXFR.* The requirement line limit allows a maximum of 6 units. Attach this academic requirement to a requirement group at the career level, with a low reporting sequence number, so that the degree audit system evaluates it first during an advising evaluation. Any courses over the limit of allowed credits are excluded from the evaluation and are not counted towards the remaining career, program, plan or subplan degree requirements.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Requirements," Setting Up a Requirement Line Item Detail

Defining Grading Basis Exception Rules

Access the Grading Basis Exception Rule page.



Grading Basis Exception Rule page

If grade bases are variable at your institution, you should define grade basis mapping rules. When students in one academic program or career enroll in classes in another program or career (that have a different grade basis) the system uses your grade basis mapping rules to convert grade basis values to those that are appropriate for the students' career and program.

Grading basis rules designate any and all schemes for grading, including the grade points for each grade.

You link grading basis exception rules to career pointer exception rules. Career pointer exceptions are linked to academic programs.

Grading basis exception rules are keyed by academic institution.

Effective Date Enter an effective date for this mapping rule.

Status Select a status for this mapping rule. Select *Active* when adding a new mapping rule. Use the *Inactive* option only if your institution no longer uses the mapping rule.

Note. If you inactivate the grading basis mapping rule, you must also remove it from the Career Pointer Exception page.

Description Enter a description for the mapping rule.

Short Description Enter a short description for the mapping rule.

Grading Basis for Requested Class The grading basis from which you are mapping. Grading basis values are defined on the Grading Scheme Table page.

Warning! If a student attempts to enroll in a mapped cross-career course, and the student selects a grade basis that you have not specified in the Grading Basis for Requested Class field as eligible for remapping, the system considers their request invalid and denies the enrollment request.

Grading Basis is Invalid Select to invalidate the grading basis. In the preceding exhibit, the *Transfer* grading basis is invalid. Students can not select the *Transfer* grading basis for classes with this mapping rule.

Grading Basis Mapped for Student The grading basis to which you are mapping. In our example, when an undergraduate student enrolls in a graduate class with a grading basis of *Satisfactory/Unsatisfactory,* the system converts their grade basis to *Pass/No Pass.* Grading basis values are defined on the Grading Scheme Table page.

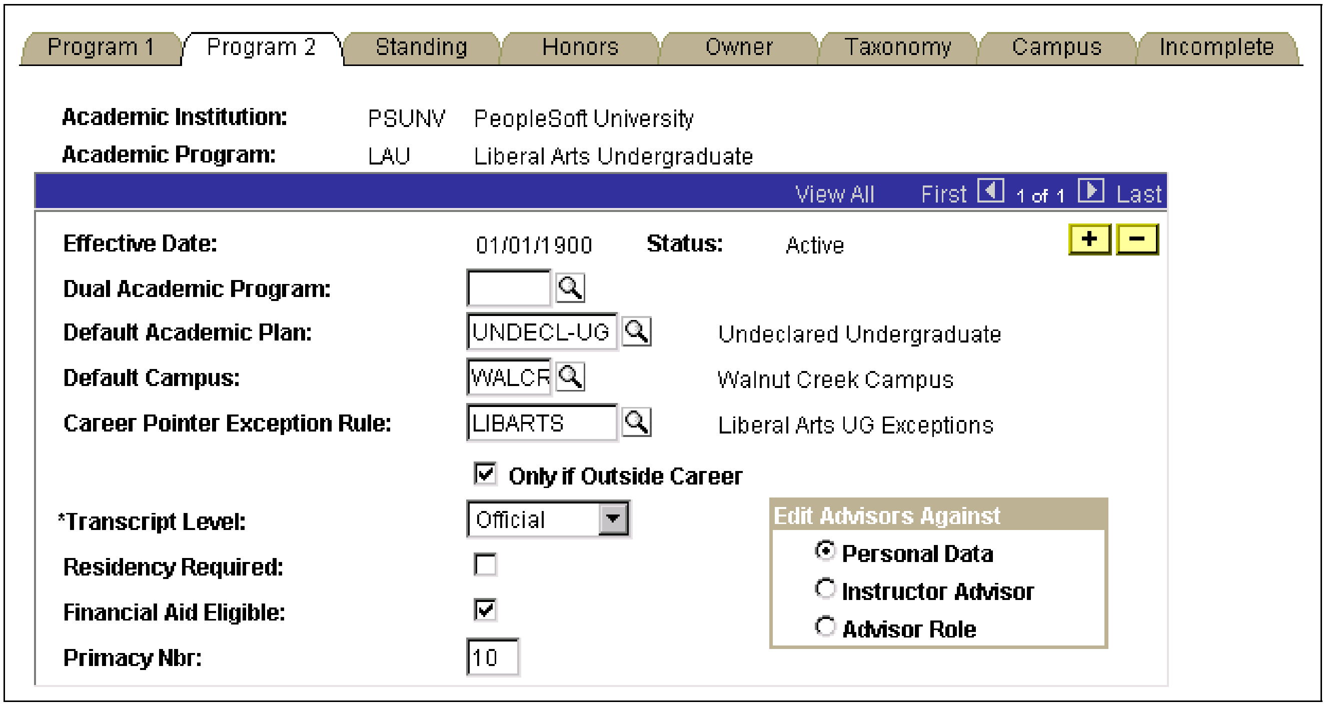
Note. When a student enrolls, the mapped values appear prior to posting the enrollment whether using PeopleSoft Enrollment Request, Enrollment, Quick Enroll, or Student Self Service Enrollment.

Grade Basis Mapping Example

To understand how the enrollment engine determines the grade basis for a particular enrollment, look at how the system determines whether or not a student can enroll in a class that is not in the student's career. For example, Michael Holt, an undergraduate, wants to enroll in Marketing 500 in the Graduate Business career.

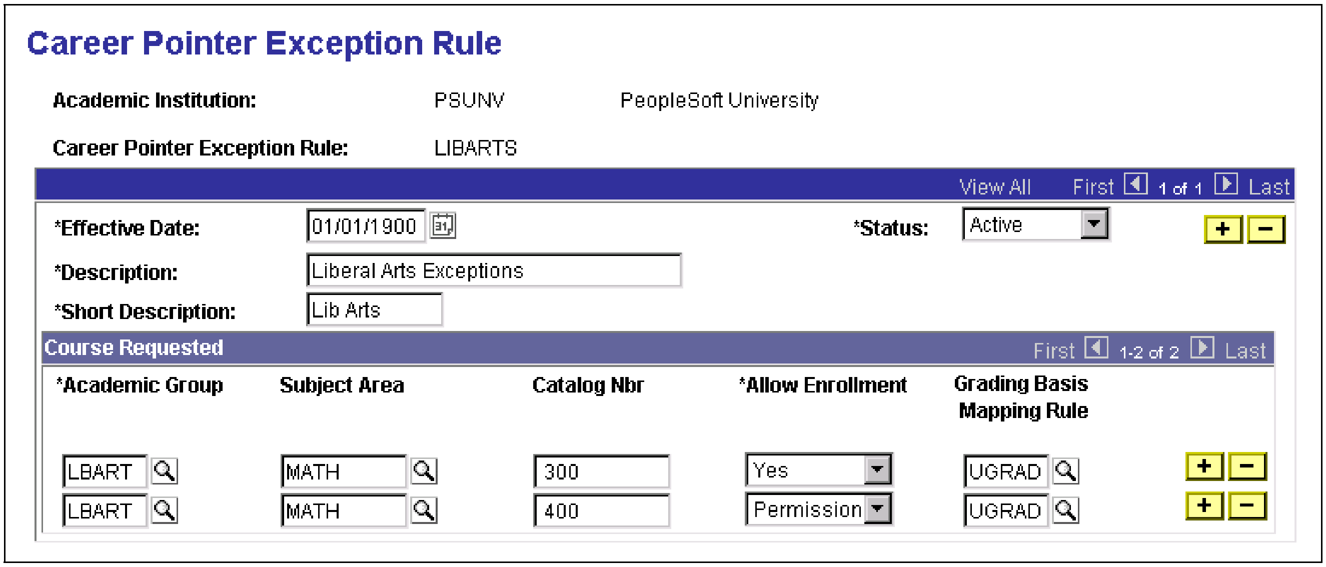
Michael's Career and Program	Requested Class	Course's Career	Grading Basis of Course	Expected Grading Basis
Undergraduate /liberal arts undergraduate (LAU) program	Marketing 500	Graduate Business	Satisfactory /Unsatisfactory (SUS)	Pass/No Pass (PNP)

When Michael tries to enroll in Marketing 500, the system first looks at the Career Pointer Exception Rule field on the Program 2 page for Michael's academic program (LAU).



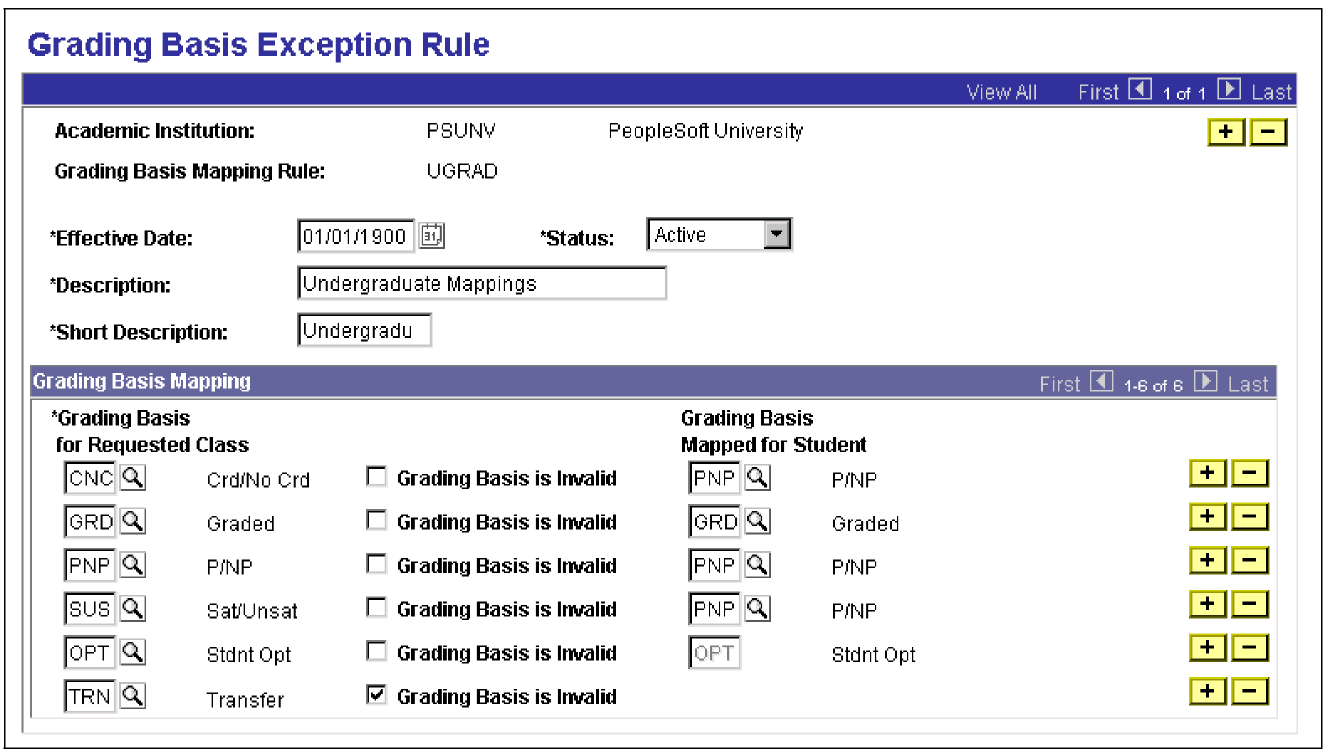
Viewing career pointer exception rules on the Program 2 page (ACADEMIC_PROG_TBL2)

If the field is cleared, grading basis mapping does not occur. Instead, the system looks at the Academic Career Pointers page to determine if the student is eligible to enroll in the class. If enrollment is allowed, the system pulls from the course's grading scheme as determined by the academic career noted on the Course Catalog - Offerings page. However, in our example, LIBARTS is selected in the Career Pointer Exception Rule field. So the system uses the LIBARTS exception rule on the Career Pointer Exception Rule page.



Viewing grading basis mapping rules on the Career Pointer Exception Rule page (CAR_PTR_EXCEPTIONS)

The system searches the Course Requested group box for rows that match the class in which the student is enrolling. In our example, Michael Holt is trying to enroll in Marketing 500. The system looks at the Academic Group, Subject Area, and Catalog Nbr (catalog number) fields. The catalog number of the requested course must be equal to or greater than the catalog number on this page. Because Marketing 500 is in the *MGMT* academic group, the Marketing subject area, and is greater than or equal to 500, the system allows Michael to enroll in the class with permission. The system then maps the grading basis to the student's career or program using the value in the Grading Basis Mapping Rule field *(UGRAD).* Grading basis mapping rules are defined on the Grading Basis Exception Rule page.



Viewing grading basis mapping rules on the Grading Basis Exception Rule page (GRD_BASE_EXCEPTION)

The system uses the values on this page to determine how to map each grading basis. Because the grading basis for the requested class is *SUS* (satisfied/unsatisfied), the system maps to *PNP* (pass/no pass). Therefore, Michael's grading basis appears as *PNP* on the Enrollment Request and Student Enrollment 1 pages.

The system maps the grading basis when you exit the Class Input field.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Defining Programs, Plans, and Subplans," Setting Up Academic Standing Parameters for Academic Programs.

Special Note Concerning the Elective Grading Basis

When a student attempts to enroll in a class outside of the student's career, and the class is offered with a grade basis where the Elective Grade Basis check box is selected, the system presents the student with their grading basis choice and a corresponding *grade basis convert to* value. Each of the premapped choices is set up in the Grade Scheme table under the career of the class and under the elective grade basis. Because students in this cross-career enrollment situation can be exposed to grade bases that are outside of their career, it is essential that you set up remapping rules that accommodate each of the possible grade bases from which a student may choose. Insert rows to accommodate all possibilities in the Grading Basis for the Requested Class field on the Grading Basis Exception Rules page. You do *not* need to insert rows for grade bases that are invalid, but you can do so. In these types of instances, select the Grading Basis is Invalid check box. For elective grading bases, it is critical that you add a row for the elective basis (for example, if *OPT,* then convert to *OPT*), for individual grade bases that make up the elective (*OPT*) grading basis (for example, if *SUS,* then convert to *PNP),* and so on.

Running the Grade Basis Exception Report

Access the Grade Basis Exception page.

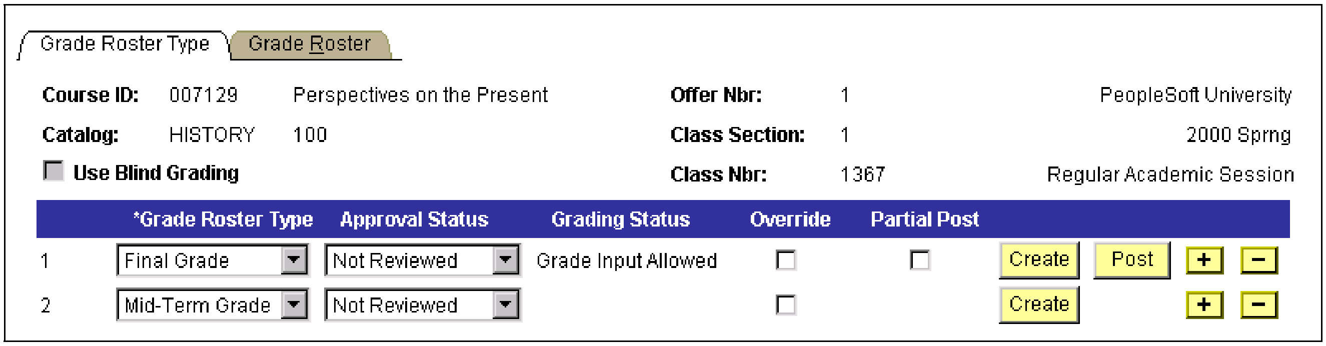
Grade Basis Exception page

Academic Institution The academic institution for which you are reporting. The system populates this field. You can change the value.

As of Date Enter an as of date to report on all grade basis exception rules that are active as of this date. Normally, you enter a date that is the start of the term or term enrollment period.

Creating Grade Rosters for a Single Class

Access the Grade Roster Type page.



Grade Roster Type page

Grade Roster Type

Select the grade roster type to generate. Grade roster type values are delivered with your system as translate values. While you should not change the *Final Grade* value, you can add as many nonfinal grade values as you want.

Description

The system populates the grade roster type description, taking it from the translate table. You can change this value.

Approval Status

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices for approval status are the following: *Not Reviewed, Ready for Review,* and *Approved.*

The system does not permit you to post grade rosters that have an approval status of *Not Reviewed* or *Ready for Review* unless you select the Partial Post check box.

Grading Status

The system populates the Grading Status field, based on the approval status for the class.

Override

Select this check box and click the Create button to delete the previous grade roster and generate a new one for the class. If you do not select this check box and just click the Create button, the system appends any new students to the existing grade roster.

Partial Post

Select to manually enter and post grades for a class section, save it, and return later to finish entering and posting grades.

Note. Although you can not approve the entire grade roster until you enter all grades, if you select the Partial Post check box, the system posts all grades that you have entered to those student's records. Once a grade is posted to a student's record, you cannot change it using the grade roster process.

Posting Date

The system displays the posting date once the grade roster post process completes.

Create

Click to create the grade roster. Go to the Grade Roster page to enter grades.

Post

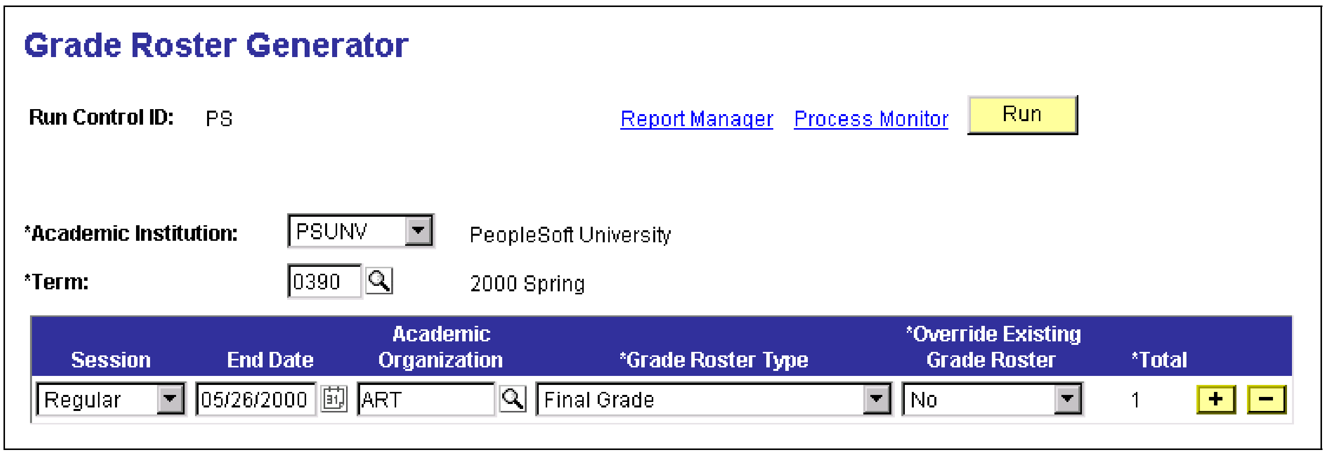
Click to post the final grades to the grade roster after you enter them. The system changes the status on the Grade Roster 1 page to *Posted.* The system does not permit you to post grade rosters that have an approval status of *Not Reviewed* or *Ready for Review,* unless you select the Partial Post check box.

Approval Status

The approval status must be *Approved* to post grades. Your choices are the following: *Approved, Not Reviewed,* and *Ready for Review.*

Creating Grade Rosters for Multiple Classes

Access the Grade Roster Generator page.



Grade Roster Generator page

Academic Institution

Select the academic institution for the grade roster process. This value controls the type of data available in the remaining fields.

Term

Select the term for the grade roster. This value controls the available session type. Term values are defined on the Term Table page

Session

Select the session for the grade roster. The session value is optional. Use it to limit your roster production to a single session within the specified term. Session values are defined on the Session Table page.

End Date

If you enter a session value, enter an end date for that session to generate grade rosters. The end date is the last date of the session.

Academic Organization and **Subject Area**

Select the academic organization or subject area for which to produce the rosters. You can select the academic organization or subject area but not both. If you select an academic organization, the Subject Area field is unavailable for entry. Conversely, if you select a subject area, the Academic Organization field is unavailable for entry. Academic organization values are defined on the Academic Organization Table page. Subject area values are defined on the Academic Subject Table page.

Grade Roster Type

Select the grade roster type to generate. Grade roster type values are delivered with your system as translate values. While you should not change the *Final Grade* value, you can add as many nonfinal grade values as you want.

Override Existing Grade Roster

Select *Yes* in this field to delete any preexisting grade rosters for the session, academic organization, or subject area. If you select *No,* the system appends any new students to the existing grade rosters. Your choices are the following:

Yes: Select to delete and override any preexisting grade rosters when you run the grade roster generator process, regardless of whether or not you have selected the Override Grade Roster check box on the Grade Roster Type page.

No: Select to retain all prior grade rosters when you run the grade roster process, regardless of whether or not you have selected the Override Grade Roster check box on the Grade Roster Type page. The system produces rosters only for those classes for which rosters have not yet been generated and appends any currently enrolled students not on the original roster.

Total

If you have selected a grade roster type of *MidTerm,* this field becomes available. The system enables you to create as many rosters as you need for each class, as long as it is not a *Final Grade* roster type. Enter the total number of nonfinal grade rosters needed for each class in the Total field.

Run the PSJob SRPCGPR. Results of the Grade Roster Generator process appear on the Grade Roster page.

CHAPTER 12

Setting Up Degrees and Honors

This chapter discusses how to set up degrees and honors.

See Also

Chapter 34, "Graduating Students," page 755

Setting Up Degrees and Honors

Graduating students requires you to set up degrees and degree honors, to update student program records, and, if necessary, to report and audit degree changes. This section discusses the first of these requirements in detail. You should also familiarize yourself with the PeopleSoft Academic Advisement application—an important and automated precursor to approving students for graduation.

Here's how to set up degrees and honors:

1. Define degrees.
2. Attach degrees to academic plans.
3. Define degree honors.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Processing Academic Advising Reports"

Pages Used to Set Up Degrees and Honors

Page Name	Object Name	Navigation	Usage
Degree Table	SA_DEGREE_TABLE	• Design Student Administration, Define Student Administration, Setup, Degree Table, Degree Table • Manage Student Records, Track Student Careers, Setup, Degree Table, Degree Table	Define both internal and external degrees for PeopleSoft Recruiting and Admissions and PeopleSoft Student Records.
Academic Plan Table	ACADEMIC_PLAN_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Plan Table, Academic Plan Table	Define a degree for each academic plan.
Degree Honors Table	DEGREE_HONORS_TBL	• Design Student Administration, Define Student Administration, Setup, Degree Honors Table, Degree Honors Table • Manage Student Records, Track Student Careers, Setup, Degree Honors Table, Degree Honors Table	Define degree honors for your institution. Example degree honors might be *with Distinction, Highest Honors in* and *Summa Cum Laude.* PeopleSoft Student Records shares this page with PeopleSoft Recruiting and Admissions because admissions staff may need to track external degree honors of applicants.

Defining Degrees

Access the Degree Table page.

Status

Select a status for this degree. Select *Active* when the degree is valid for your institution. You can keep all degrees in the database for historical purposes by setting any degrees that you no longer award to *Inactive.*

Description, Short Description, and **Formal Description**

Enter descriptions of the degree. Later, you can identify which description appears on the transcript.

Internal Degree

Select to indicate that the degree is internal to your institution and that it does not represent a degree from another organization.

Years of Education

There is no programming tied to this field; use it for informational purposes only.

Educational Level

There is no programming tied to this field; use it for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these values.

Attaching Degrees to Academic Plans

Access the Academic Plan Table page.

Students who are active in a program with more than one plan can potentially receive more than one degree when you set a student's degree checkout status to *Approved* and click the Update Degrees button on the Student Degrees page. Conversely, if a student has multiple plans under one program, and each of those plans is associated with the *same* degree, then a student receives only one degree when you set the degree checkout status to *Approved* and click the Update Degrees button on the Student Degrees page.

This is important to consider when you are setting up degrees for plans that are linked to the same program and where students may have two or more of such plans under a single program at a given time. This is also important to consider when setting up double majors. For example, if you have a particular double major combination, for which you want only one degree, you may want to create two separate plans to represent each major but tie the double major degree to only one of the plans. Or, you may want to create one plan that represents the double major. For students who attempt a degree with only one of these two majors, you would assign a different plan to them, with a slightly different degree. For example, instead of a bachelor of science degree in architecture and engineering, you might also create a degree that is a bachelor of arts in architecture, a bachelor of science in architecture, and yet another degree that is a bachelor of science in engineering. Of course, you must also consider the effect that plan assignment has on your academic advisement setup and the way that you define plan- or program-based requirements.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Plans

Defining Degree Honors

Access the Degree Honors Table page.

Note. The Degree Honors Table page differs from the Honors/Awards Table page in that it relates to only internal degrees, plans, and subplans.

Honor Type

The type of honor and where it appears on the transcript.

For example, an honors type of *Degree Plan Suffix* indicates that the honor appears on the transcript *after* the degree plan.

Honor type choices are Degree Prefix, Degree Suffix, Degree Honors, Degree Plan Prefix, Degree Plan Suffix, Degree Sub-Plan Prefix, and Degree Sub-Plan Suffix. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Status

Select a status for the degree honor. Select *Active* when adding a new degree honor. Select *Inactive* only if your institution will no longer use this degree honor.

Description, Short Description, and **Formal Description**

Enter descriptions of the honor. You can set up your transcript type so that the formal description prints on the diploma and transcript.

Print on Diploma There is no programming tied to this field; use for informational purposes only.

Print on Transcript Select this check box to display the formal description of the degree honor on the transcript.

CHAPTER 13

Setting Up Transcripts

The PeopleSoft Transcript feature enables you to define multiple types of transcripts, at varying levels of security, formality, appearance and function. This chapter provides an overview of the setup required to process transcripts, and discusses how to:

- Define transcript type security.
- Create transcript notes.
- Create transcript text.
- Review transcript print areas.
- Define transcript types.

See Also

Chapter 35, "Producing Transcripts," page 787

Understanding Transcript Levels

On various pages throughout your Student Administration system you are prompted to select the transcript level for which you would like to print certain information. The transcript level you select determines the type of transcript on which the information appears. Transcript levels are hierarchical based upon the two-digit numeric code in the *value* column of the translate table for the field TRANSCRIPT_LEVEL. The transcript levels, their values on the translate table, and their descriptions are as follows:

Transcript Level	Value	Description
Not Print	00	Do not print the information on any transcript.

Transcript Level	Value	Description
Official	20	Print the information on the official transcript, the unofficial transcript, and the student life transcript. Includes all information that is flagged throughout the system as Official, Unofficial, Student Life, and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check boxes.
Unofficial	40	Print the information on the unofficial transcript and the student life transcript. Includes all information that is flagged throughout the system as Unofficial, Student Life, and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check boxes.
Stdnt Life (student life)	60	Print the information on the student life transcript. Includes all information that is flagged throughout the system as Student Life and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check boxes.
Degr Prog (degree progress)	80	Print the information on the degree progress transcript, which can include academic advisement information in addition to a transcript. Does not include a transcript. Includes an Advising Report only if you select the Advising Report or Special Advising Report check boxes. The advising report is ordered and evaluated for each student by career.

When you generate transcripts, the system includes the applicable information for all transcripts types with a value on the translate table greater than or equal to the transcript level you select. For example, if you select Official, the system includes the applicable information on all transcript types. However, if you select Stdnt Life, the system only includes the applicable information on student life transcripts and degree progress transcripts.

Transcript level values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Defining Transcript Type Security

You can assign different levels of transcript type security to each user at your organization. Transcript type security authorizes users who have access to the transcript request pages to create transcript requests only for those transcript types for which they have security.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Student Records," Setting Security for Transcript Types

Creating Transcript Notes

Use the Transcript Notes Table page to define transcript notes that can appear alongside a particular student enrollment record. Transcript notes only print on a student's transcript when you both attach the pre-defined note to an individual student's enrollment record, and process a transcript type for which the Print Transcript Note check box is selected. Typically, transcript notes are generic enough that they can be re-used for multiple students' enrollment records. You can attach notes to a student's enrollment record through either the Transcript Note link on the Enrollment Request page, or the Transcript Note fields on the Student Enrollment 3 page.

See Also

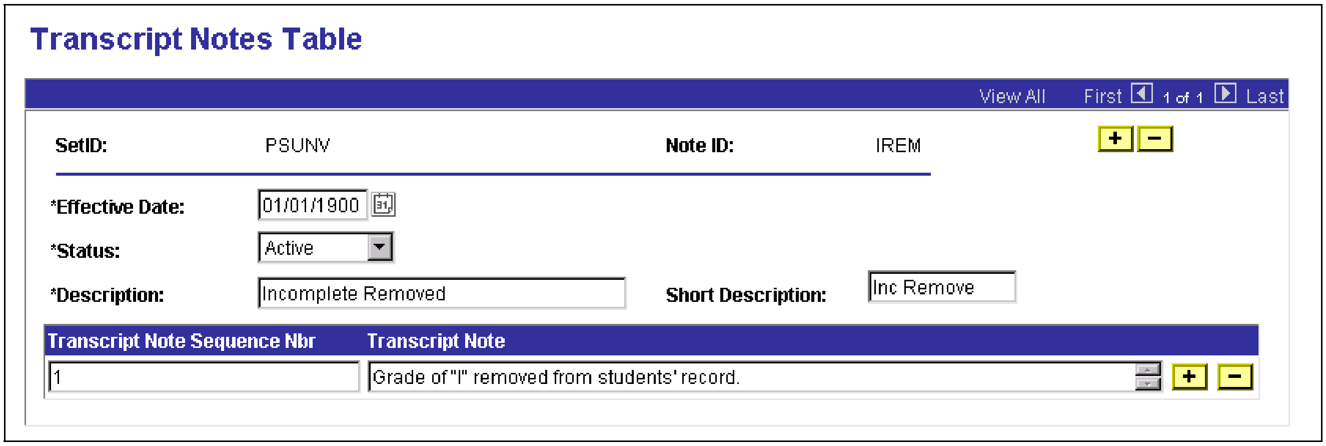
Chapter 24, "Processing Class Enrollment Transactions," Understanding Class Enrollment Processing, page 505

Pages Used to Create Transcript Notes

Page Name	Object Name	Navigation	Usage
Transcript Notes Table	TSCRPT_NOTES_TBL	• Design Student Administration, Define Student Records, Setup, Transcript Notes Table, Transcript Notes Table • Manage Student Records, Manage Academic Records, Setup, Transcript Notes Table, Transcript Notes Table	Define transcript notes.

Defining Transcript Notes

Access the Transcript Notes Table page.



Transcript Notes Table page

Effective Date
Enter an effective date for this transcript note. The effective date defines when the status you select is valid.

Status
Select a status for this transcript note. Select *Active* when adding a new transcript note. The *Inactive* option should only be used if your institution will no longer use this transcript note.

Description
The description is used for system related display purposes only. The description does not appear on the transcript.

Short Description
The short description is used for system related display purposes only. The short description does not appear on the transcript.

Transcript Note
Enter the transcript note in the free-form text field. This is the text that appears on the student's transcript when you both attach the note to a student's enrollment record, and process a transcript type for which the Print Transcript Note check box is selected.

Transcript Note Sequence Nbr (transcript note sequence number)
The transcript note sequence number enables you to create multiple note lines under one note ID. When you select a transcript note to appear on a transcript, all notes under the note ID appear.

Creating Transcript Text

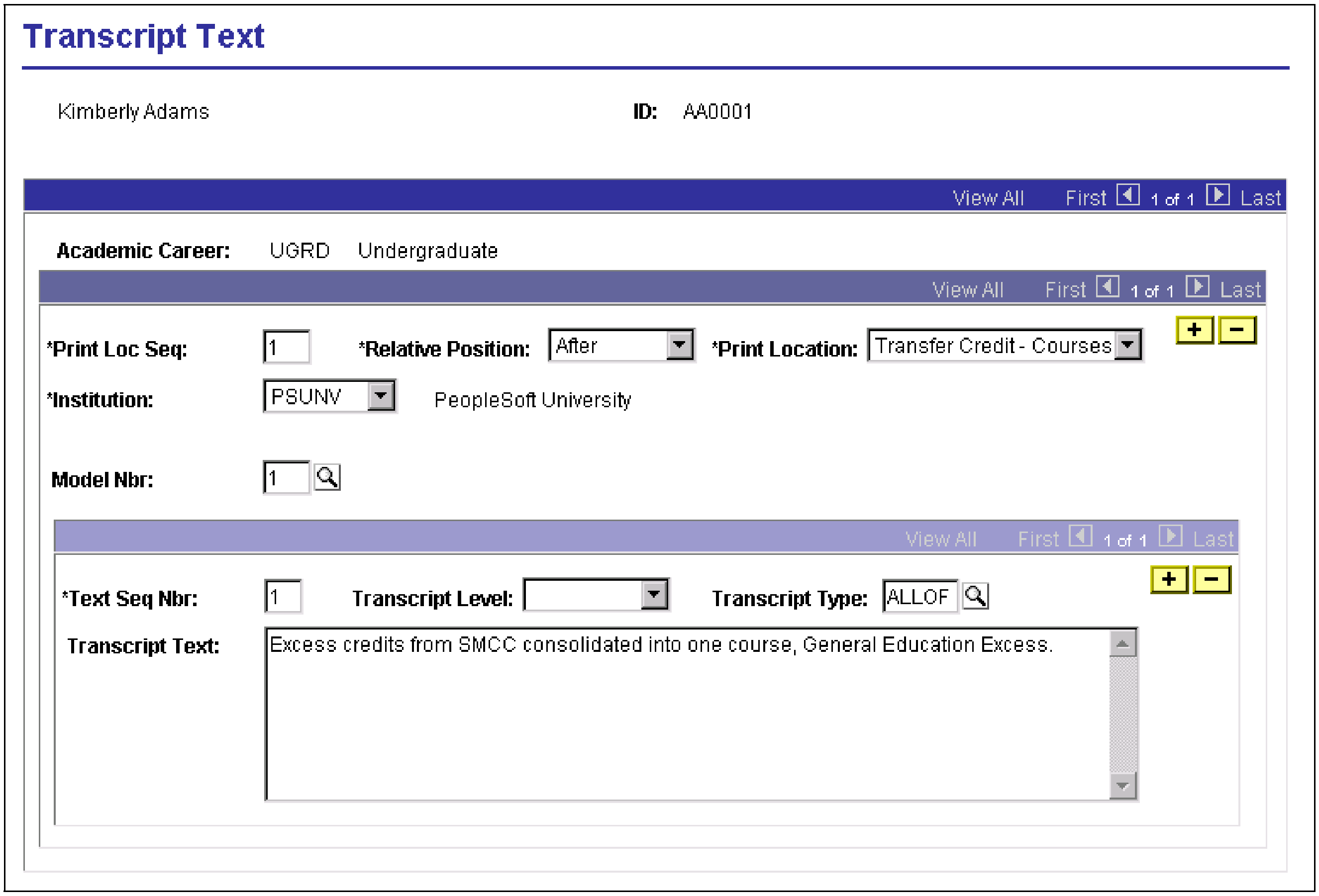
Use the Transcript Text page to define transcript text for a specific student. Unlike transcript notes, which are predefined and attached to students on the enrollment request pages, transcript text is created for a specific student and is not necessarily associated with a specific enrollment record. Once you create transcript text for a student, it always appears on transcripts with the transcript type you specify, or on a transcript that is at or above the transcript level you specify. There are no options at the transcript type setup level that enable you to inactivate or hide transcript text. You can limit when and how the transcript text appears by using the filtering options on the Transcript Text page to specify valid transcript types, levels, and relative positions for the transcript text.

Pages Used to Create Transcript Text

Page Name	Object Name	Navigation	Usage
Transcript Text	TRANSCRIPT_TEXT	Manage Student Records, Manage Academic Records, Use, Transcript Text, Transcript Text	Define transcript text for a specific student.

Defining Transcript Text

Access the Transcript Text page.



Transcript Text page

Print Loc Seq (print location sequence)

Enter the print location sequence to identify the order in which notes appear within a print location. The default is *1,* and each additional row increments by one.

Relative Position

Select the relative position of the note within the chosen print location. You are prompted from the translate table. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Valid values include the following:

After: Select this value if you want the transcript text to appear immediately after the specified print location sequence. In the exhibit example, the text “Excess credits from SMCC consolidated into one course, General Education Excess” would appear immediately after the Transfer Credit - Courses section on the transcript type of *ALLOF.*

Before: Select this value if you want the transcript text to appear immediately before the specified print location sequence.

Print Location

Enter the print location of the text. Print location values are delivered with your system and you can view them on the Print Area Table page. Modification to these values would require programming effort. The system uses this value in conjunction with the relative position value to determine where to print the transcript text. If the Transcript Type or Transcript Level that you specify is associated with a transcript type that has the Print Location set to *Do Not Display,* then the transcript text does not appear on the transcript. The transcript type setup is the overriding rule. Valid Print Location values are as follows:

Academic Program, Academic Standing, Cumulative Stats, Degrees − External, Degrees − Local, Enrollment, Milestones, Student Personal Data, Term Honors, Term Statistics, Transcript Print Date, Transcript Recipient, Transcript Request Reason, Transcript Requester, Transfer Credit − Courses, Transfer Credit − Others, Transfer Credit − Tests, and Withdrawal Info.

Note. Transcript text associated with a print location of *Academic Program* appears on the transcript only if the associated transcript type is configured such that the academic program prints in the Transcript Header. To review a particular transcript type's setup data, access the Transcript Type — Program page.

Note. Transcript text associated with a print location of *Institution Data* appears differently on transcripts printed through Crystal than it does on transcripts you view online. Transcripts printed through Crystal always display institution data in a reserved area in the header of the transcript (upper left corner). This reserved area has a limited number of lines of text. For this reason, we have inactivated the *Institution Data* value. Any transcript text created with a print location of *Institution Data* prior to PeopleSoft Student Administration 8 will remain in the database, and print as always. However no new entries with a print location of *Institution Data* can be made. To review a particular transcript type's setup data, access the Transcript Type — General page.

Note. Transcript text associated with a print location of *Student Personal Data* does not appear as expected for transcript types where student personal data is set to print in the page header. This is because the page header has a limited number of text lines available for printing. Therefore, transcript text associated with student personal data and a transcript type with student personal data printing in the page header, will instead print the transcript text in the first lines of text in the body of the transcript. To review a particular transcript type's setup data, access the Transcript Type — General page.

Note. Transcript text for all types of *Transfer Credit* must be associated with a transfer model. Because the model can be applied to multiple articulation terms, the impact on printing associated with transcript text is significant. Therefore, transcript text associated with a transfer credit model can be printed successfully only when the transfer credit is configured to print in the transcript header or transcript trailer. Transfer credit that is configured to print in the enrollment detail or enrollment trailer will not display any associated transcript text. To review a particular transcript type's setup data, access the Transcript Type — Transfer/Test/Other Credits page.

Institution

Enter the institution for which you want to create the transcript text. The institution value determines which transcript types are available in the Transcript Type field.

Model Nbr (model number)

Based on the print location you select, the system prompts you for additional information. For instance, if you select a print location of *Transfer Credit - Courses,* the Model Number field appears. If you select a print location of *Milestones,* the Milestone Number field appears, and so on.

Text Seq Nbr (text sequence number)

The system populates the text sequence number to *1* by default. You can insert text rows and increase the text sequence number. The sequence number determines the order of printing on the student's transcript before or after a print location.

Transcript Level

Select either a transcript level or a transcript type, but not both. Select a transcript level to determine the types of transcripts on which the system will include this transcript text.

Depending on the transcript level you select, the system prints the transcript text on transcript types set to the same level, and all other greater numbered transcript types on the translate table. For example, if you select *Official* for your transcript level (which has a level value of 20 on the translate table), the system prints the transcript text on all transcript types that have transcript levels of 20 to 80. However, if you select *Stdnt Life* for your transcript level (which has a level value of 60 on the translate table), the system prints the transcript text only on those transcript types where the transcript level is set to *Stdnt Life* or *Degr Prog* (degree progress), levels 60 - 80. The only exception to this rule is *Not Print.*

If you select Not Print, the transcript text never prints.

Transcript Type

Select either a transcript level or a transcript type, but not both. Enter a transcript type if you want the text to appear only on the type you specify.

Transcript Text

Enter your free-form text in the Transcript Text field. This text appears on the student's transcript.

Note. If you use the Historical Course Enrollment page for conversion purposes, and want to display term statistics for those enrollments, use transcript text for those statistics. Otherwise, display summary statistics that you converted using the transfer credit process.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Preparing for Data Conversion,” Converting Student Records Data.

Reviewing Transcript Print Areas

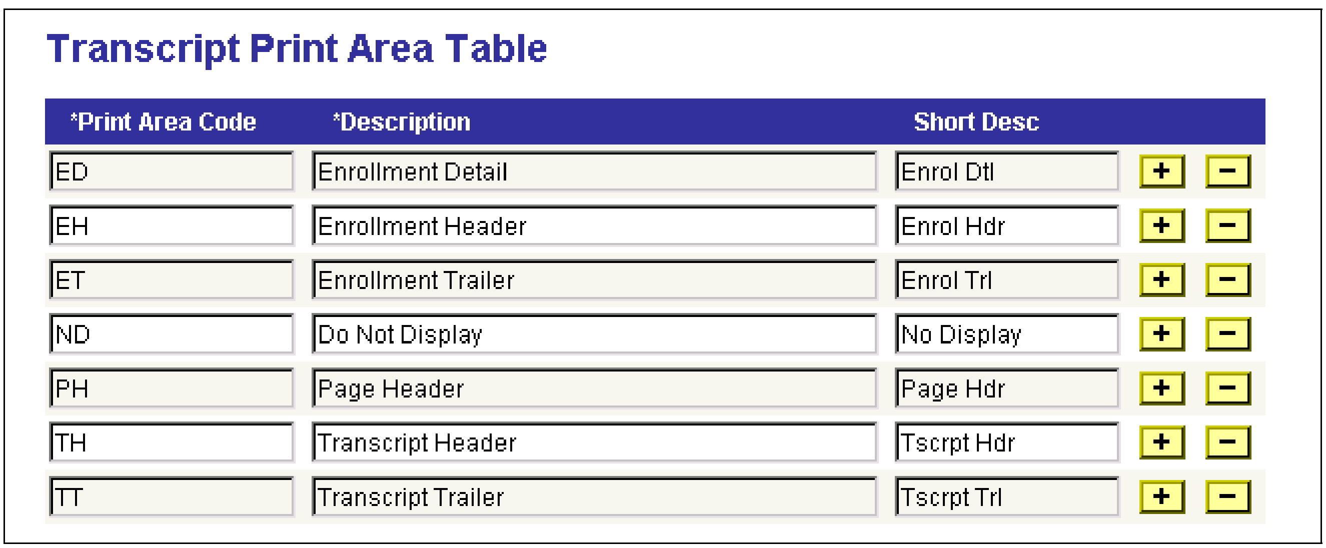
Transcript print areas are associated with codes that define areas of the transcript on which various types of transcript data appear. Print area values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Pages Used to Review Transcript Print Areas

Page Name	Object Name	Navigation	Usage
Transcript Print Area Table	PRINT_AREA_TABLE	Design Student Administration, Define Student Records, Setup, Transcript Print Area Table, Transcript Print Area Table	Review delivered transcript print areas.

Reviewing the Transcript Print Area Table

Access the Transcript Print Area Table page.


Transcript Print Area Table

*Print Area Code	*Description	Short Desc
ED	Enrollment Detail	Enrol Dtl
EH	Enrollment Header	Enrol Hdr
ET	Enrollment Trailer	Enrol Trl
ND	Do Not Display	No Display
PH	Page Header	Page Hdr
TH	Transcript Header	Tscrpt Hdr
TT	Transcript Trailer	Tscrpt Trl

Transcript Print Area Table page

Print Area Code An acronym that defines the transcript print area.

Description Text used on the Transcript Type component to determine print detail.

Short Description Value used internally by system processes. Not visible on any pages.

Note. The values on the Transcript Print Area Table page are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Defining Transcript Types

The Transcript Type component enables you to define various types of transcripts for your institution, each type with its own unique purpose, design and formality level. In addition to the typical unofficial and official transcripts that many institutions require, you can use this component to define academic advisement report types.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Processing Academic Advising Reports"

Prerequisites

Before you can create transcript types, you must create academic careers. In addition, if you want to create an academic advisement report that references a special requirement usage (one other than standard), you must create requirement usage values.

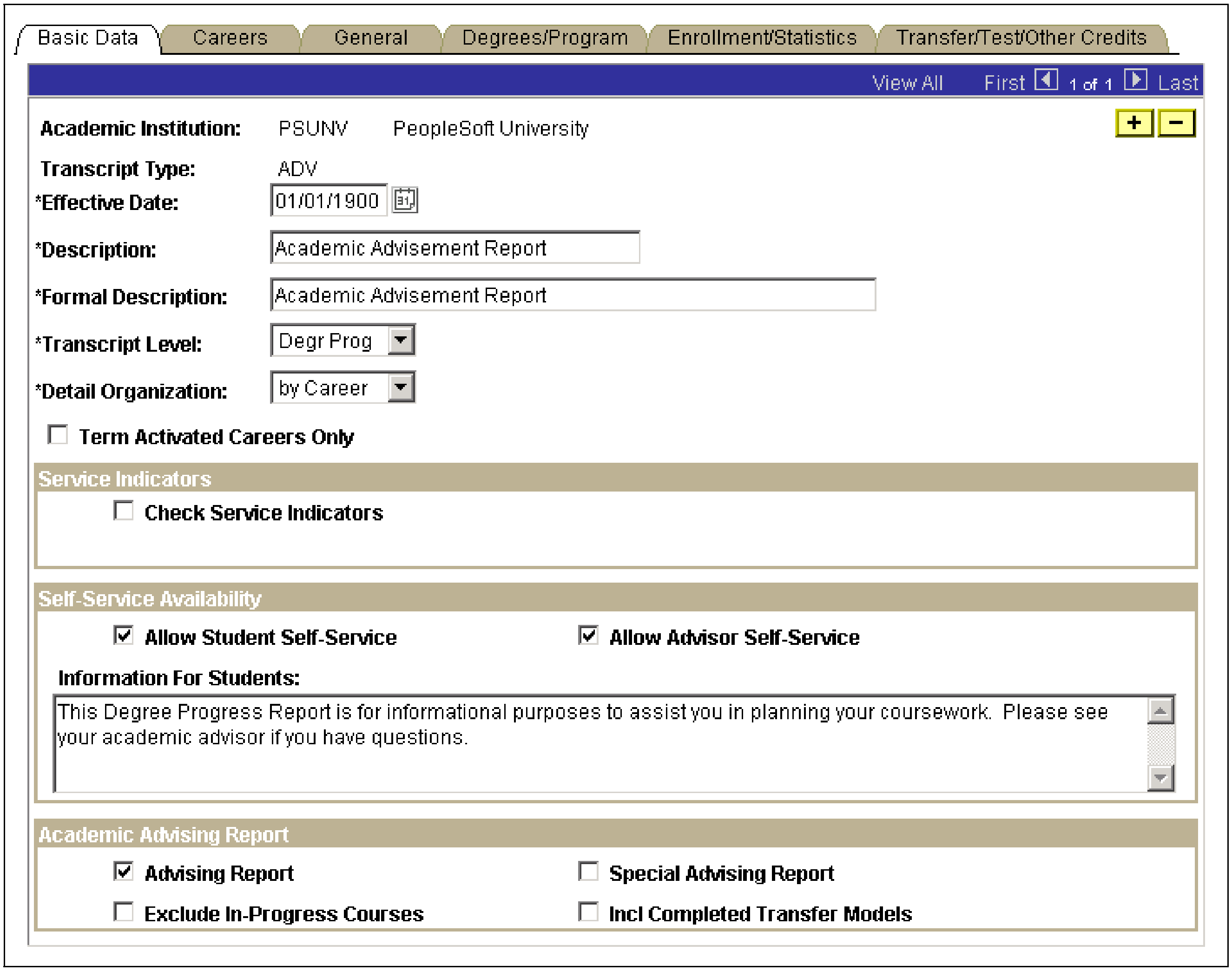
Pages Used to Define Transcript Types

Page Name	Object Name	Navigation	Usage
Transcript Type - Basic Data	TSCRPT_TYPE	Design Student Administration, Define Student Records, Setup, Transcript Type, Basic Data	Define transcript types, associate service indicators, specify transcript levels, define self-service availability, and indicate if a transcript type includes an advising report. Typical transcript types are those such as official, unofficial, graduate, undergraduate, degree audit, NCAA, continuing education, and so on.

Page Name	Object Name	Navigation	Usage
Transcript Type - Careers	TSCRPT_CARS	Design Student Administration, Define Student Records, Setup, Transcript Type, Careers	For transcript types with a Detail Organization value of "by Career," Define all possible careers that this transcript type can report. When you run the transcript request process for this transcript type, the system generates transcripts or advising reports. Transcripts are processed for each career specified, that matches a career of the student. Advising reports are processed for each career in which the student has a current program action of *activate, data change, plan change, program change,* or *readmit.* A transcript type can have multiple academic careers linked to it.
Transcript Type - General	TSCRPT_TYPE_GEN	Design Student Administration, Define Student Records, Setup, Transcript Type, General	Define the print areas and details of display for various types of information such as institution, student, print date, and reason information.
Transcript Type - Degrees/Program	TSCRPT_TYPE_LOCDGR	Design Student Administration, Define Student Records, Setup, Transcript Type, Degrees/Program	Define the print areas and details of display for academic program related elements.
Transcript Type - Enrollment/Statistics	TSCRPT_TYPE_ENRL	Design Student Administration, Define Student Records, Setup, Transcript Type, Enrollment/Statistics	Define the print areas and details of display for enrollment information.
Transcript Type - Transfer/Test/Other Credits	TSCRPT_TYPE_TRNSFR	Design Student Administration, Define Student Records, Setup, Transcript Type, Transfer/Test/Other Credits	Define the print areas and details of display for transfer, test and other credits.

Defining Transcript Type Basic Data

Access the Basic Data page.



Basic Data page

Enter an Academic Institution and an alphanumeric Transcript Type code (one to five characters in length).

We recommend that institutions do not define a Transcript Type of "ALL" as this value is used on the Transcript Type Security page to grant users access to "all" transcript types.

See *PeopleSoft Student Administration Fundamentals PeopleBook, Securing Your Student Administration System, Securing Student Records, Setting Security for Transcript Types.*

Effective Date The effective date determines when this transcript type is available on the batch and online transcript request pages.

Description This does not appear on the transcript. It is used for related display purposes.

Formal Description This appears at the beginning of the transcript.

Transcript Level The transcript level which you would like to associate with this transcript type. Transcript level is hierarchical and based upon the two position numeric code in the value column of the translate table. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

See Chapter 13, “Setting Up Transcripts,” Understanding Transcript Levels, page 255.

Detail Organization

How the system sorts information on the transcript. Your choices are:

by Career: Select this value to sort information by the student’s academic career, and then by term. For instance, if the student has an undergraduate and graduate record, the system first displays all of the academic career information that matches one academic career, and then all of the academic career information that matches the other career. Within each academic career grouping, information is ordered by term. The system determines the order in which academic career records appear on the transcript by referencing the sequence number of each academic career on the Careers page. Those academic careers with the lowest sequence numbers print first, and so on. The system only seeks and evaluates the academic careers on the Careers page that match the student. Be sure to enter all possible academic careers that you want to capture and report with this transcript type.

Chrono: Select this value to sort information chronologically. For example, all academic careers in which the student has been active (that are also listed on the Careers page) will print in chronological order, by term. The *Chrono* setting is *not* intended for use with the advising check boxes. Advising reports *always* print by academic career.

Term Activated Careers Only

Select this check box to exclude career data from printing on the transcript for which a student has no academic history, such as those careers added to students for prospect records.

Warning! If your institution produces Academic Advising reports for students who are not term-activated (for example, for prospective transfer students), this check box should be cleared for the transcript types associated with these report types.

Check Service Indicators

Select this check box to have the transcript process identify indicators (holds or positive services) that you specify in the Service Impacts fields.

Service Impacts

Select the service impacts that the system evaluates in the transcript process. If the system finds on a student’s record a service indicator with any one of the up to three service impacts you list, the system does not generate a transcript for the student. Instead, the system generates an error message in the transcript output. Service impact values are defined on the Service Impact Table page.

Allow Student Self-Service

If you select this check box and the transcript level is *Official,* the system generates a request for this transcript type on the Learner Services - Request Official Transcript collaborative application page. Select this check box for only one transcript type per institution.

If you select this check box and the transcript level is *Unofficial,* the system displays this transcript type on the Learner Services - Unofficial Transcript collaborative application page. You can select this check box for multiple transcript types.

If you select this check box and the transcript level is *Degree Progress,* the system displays this transcript type on the Learner Services - View Degree Progress Report collaborative application page, and the Learner Services — Evaluate Transfer Credit — Process a Degree Progress Report page. You can select this check box for multiple transcript types.

Allow Advisor Self-Service

If you select this check box and the transcript level is *Unofficial,* the system displays this transcript type on the Learning Management - View Advisee Information collaborative application page (unofficial transcript). You can select this check box for multiple transcript types.

If you select this check box and the transcript level is *Degree Progress,* the system displays this transcript type on the Learning Management - View Advisee Information collaborative application page (degree progress report). You can select this check box for multiple transcript types.

This check box does not have any use with a transcript level of *Not Print* and *Stdnt Life* (student life).

Information for Students

This free form text appears to students for the respective transcript type on the Learner Services page.

Advising Report

Select this check box to include academic advisement information on the transcript, regardless of whether you specify a level of *Degr Prog* (degree progress) in the Transcript Level field or not. At run time, the system evaluates students against academic requirement groups with a requirement usage of *Academic Advisement,* which is the default when creating new academic requirement groups.

Special Advising Report

Select this check box to create an academic advisement transcript type that references academic requirement groups with a special requirement usage (one other than the default of *Academic Advisement* that is used for most general advising requirements). If you select the Special Advising Report check box, the Requirement Usage field becomes available for entry.

Exclude In-Progress Courses

If you select the Advising Report check box or the Special Advising Report check box, the Exclude In-Progress Courses check box becomes available for entry. Select this check box to exclude ungraded courses or graded courses with an in-progress type of grade (as defined on the Grading Scheme Table component), from satisfying degree audit requirements. Normally, you select this check box for academic advisement transcript types used at degree check out time. This ensures that in-progress coursework does not satisfy a student's final degree checkout requirements; which, could lead to an unintentional degree posting.

If you do not select this check box, the system will flag on the advising report those requirements fulfilled by in-progress coursework with an indicator of *(IP),* signalling to both the student and the advisor that completion of the requirement is pending successful completion of the related coursework. The system displays the *(IP)* flag after the Requirement long description and after the Requirement Line long description of those requirements and lines that use the in-progress courses.

Incl Completed Transfer Models (include completed transfer models)

This check box is designed for use primarily with prospects and applicants who have completed transfer models in the system, but who have not yet matriculated. Select this check box in order for the advising report to include in its evaluation the internal course equivalents (course, test, and other) of a student's completed transfer model. The system does not include in its evaluation courses recorded under completed transfer models that do not match the student's what-if program or current program.

Warning! Do not select the Term Activated Careers Only check box in conjunction with the Incl Completed Transfer Models check box if you plan to run what-if advising reports for prospects and applicants. This is because the system will not generate a report if the student has no term activated rows.

Note. The "Evaluate My Transfer Credit" self-service feature (available through the separately licensed collaborative application PeopleSoft Learner Services), does not require a transcript type that has the Incl Completed Transfer Models check box selected. This is because when processing an advising report through this feature, the system automatically collects completed transfer models that are targeted to the same program as the self-service model.

Requirement Usage

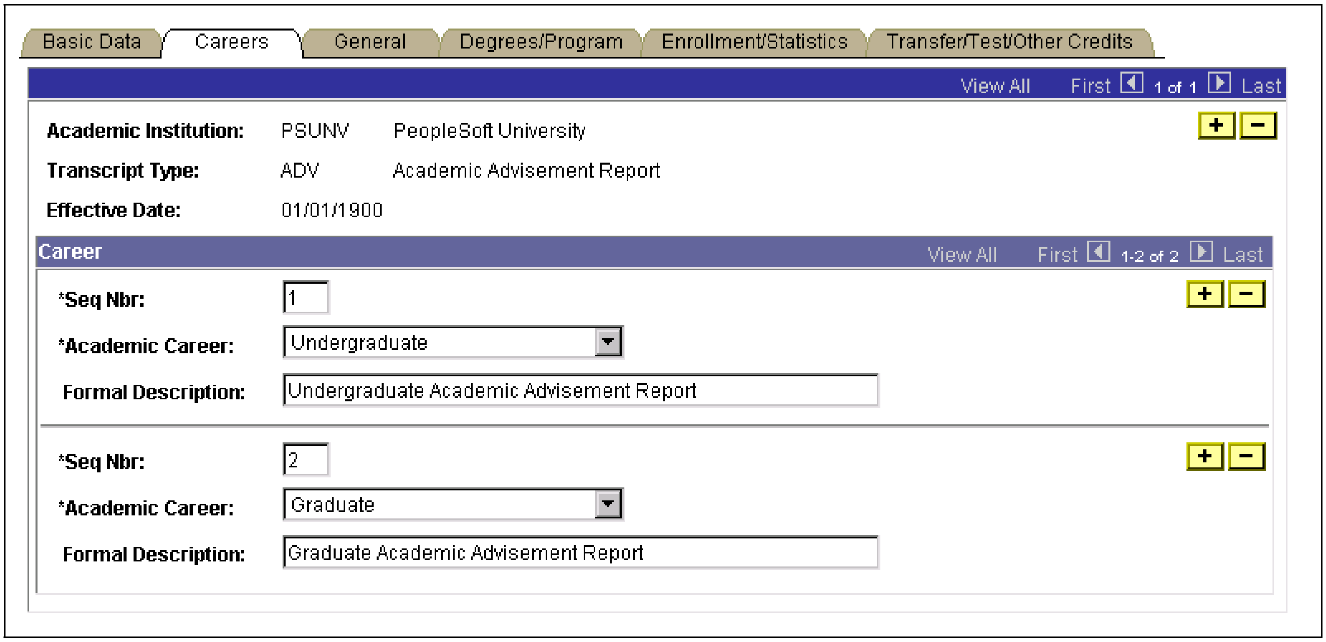
If you select the Special Advising Report check box, the Requirement Usage check box becomes available for entry. Select the usage that identifies the special academic requirement group that you want to evaluate for this transcript type. For example, you could create a special requirement usage to evaluate satisfactory academic progress or NCAA eligibility. For regular advising reports, the system never evaluates academic requirement groups with special usage values.

Instead, the system evaluates these special requirement groups only when you run special advising reports; in this case, you would create a requirement usage of "Sat Prog," "NCAA," or the like.

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, "Setting Up Optional Advisement Data," Setting Up Special Requirement Usage Values.

Linking Academic Careers to Transcript Types

Access the Careers page.



Careers page

Note. If the Detail Organization field on the Basic Data page is set to *Chrono,* no fields appear on the Careers page. All student information, regardless of career, will print chronologically by term.

Seq Nbr (sequence number)

The system populates this field for the first row with a value of *1* and increments each additional row by one. Sequence number indicates a unique row of information and the order in which academic career information appears on the transcript. For example, if a student is active in two academic careers (Undergraduate and Graduate), the transcript type setup such as that shown in the exhibit would produce a transcript where the student's Undergraduate (Seq Nbr 1) transcript or degree audit appears first, then a section break, then the student's Graduate (Seq Nbr 2) transcript or degree audit appears. The order in which a student becomes active in a career has no effect on transcript print order. Career print order is always specified by the transcript type sequence.

Academic Career

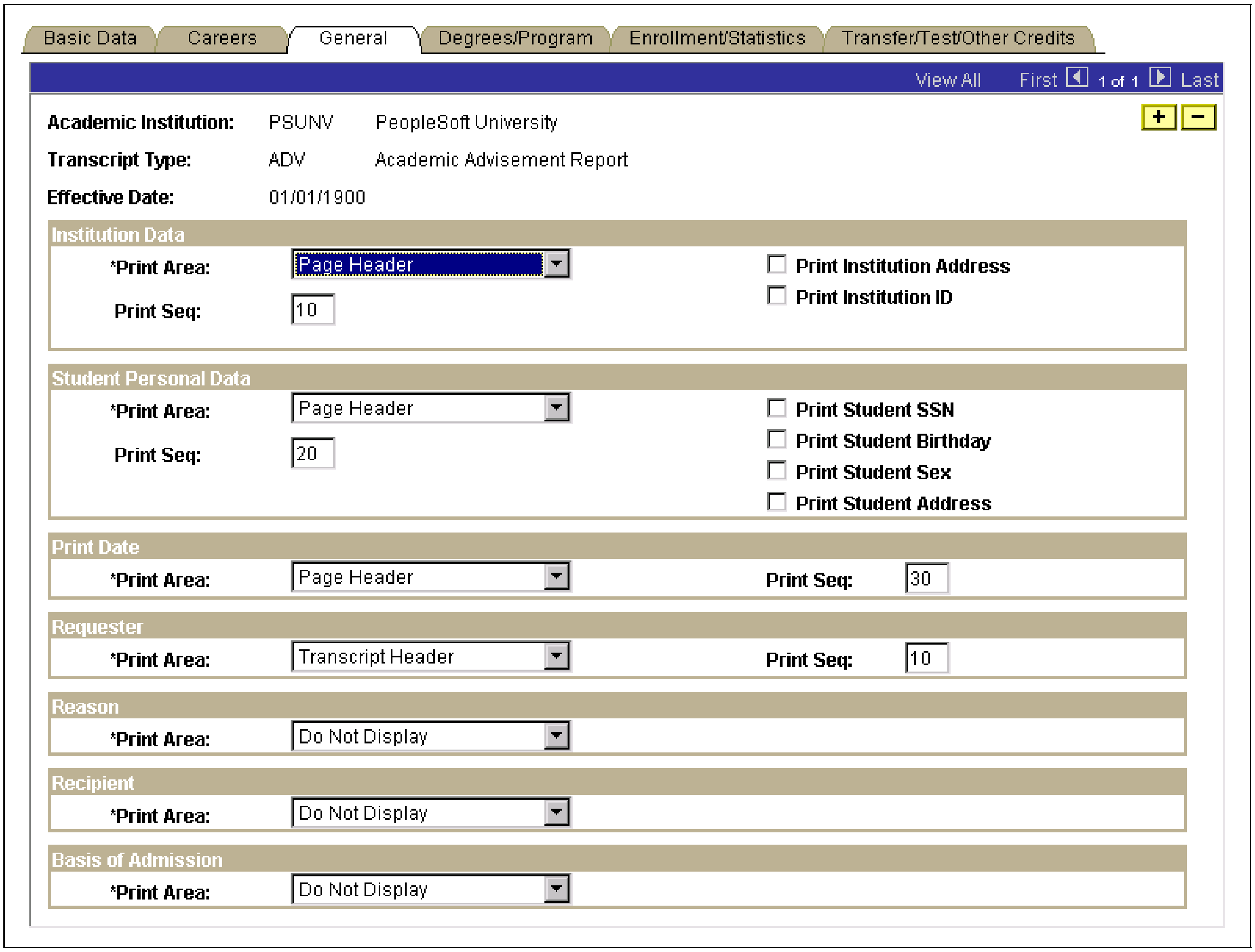
Enter all possible careers that this transcript type can report. Use multiple rows as necessary. When you run the transcript request process for this transcript type, the system generates individual enrollment detail or degree audits for each career in which the evaluated student is active. For example, if you have ten careers specified for a single transcript type, and you run the transcript type for a student who has one career that matches one of the careers specified, and another career which does not match, only enrollment detail associated with the matching career appears. The other non-matching career's enrollment detail or degree audit information does not appear. Academic career values are set up as translate values and are defined on the Academic Career Table page.

Formal Description

The system populates the formal description by default. You can change this value. This description appears on the transcript.

Designating Student and Institutional Information

Access the General page.



Transcript Type - General page

Note. Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

Institution Data Print Area	Select the print area in order to indicate where the system displays academic institution data. Your choices are *Do Not Display, Transcript Header,* and *Page Header.*
Institution Data Print Seq (institution data print sequence)	The system populates the print sequence by default. The print sequence determines the order in which institution data information appears within the print area. You can change the value. In the exhibit example, both student and institution data will print in the page header area. However, the institution data will print first and the student data will print second due to the print sequence numbers.
Print Institution Address	Displays the institution address in the area specified.
Print Institution ID	Displays the institution ID in the area specified.

Student Personal Data Print Area	Select the print area in order to indicate where the system displays student personal data. Your choices are *Do Not Display, Transcript Header,* and *Page Header.*
Student Personal Data Print Seq	The print sequence determines the order in which student personal data appears within the print area. The system populates the print sequence by default. You can change the value.
Print Student SSN (print student social security number)	Displays the student's social security number in the area specified.
Print Student Birthday	Displays the student's date of birth in the area specified.
Print Student Sex	Displays the student's gender in the area specified.
Print Student Address	Displays the student's address that corresponds with the setting in the Home Address Type field on the Define General Options, Installation Table - Defaults page.
Print Date Print Area	The date on which the transcript is generated (and not necessarily printed). Select the print area in order to indicate where the system displays print date information. Your choices are *Do Not Display, Transcript Header,* and *Page Header.*
Print Date Print Seq	The print sequence determines the order in which print date information appears within the print area. The system populates the print sequence by default. You can change the value.
Requester Print Area	The last name, first name of the user who created the transcript request. Select the print area in order to indicate where the system displays requester information. Your choices are *Do Not Display, Transcript Header* or *Page Header.*
Requester Print Seq	The print sequence determines the order in which requester information appears within the print area. The system populates the print sequence by default. You can change the value.
Reason Print Area	The reason for the transcript request as specified in the Request Reason field on the Request Header page. Select the print area in order to indicate where the system displays request reason information. Your choices are *Do Not Display, Transcript Header,* and *Page Header.*
Reason Print Seq	The print sequence determines the order in which request reason information appears within the print area. The system populates the print sequence by default. You can change the value.
Recipient Print Area	Recipient is the name of the institution, department, or individual that receives the transcript. You must enter *send to* information during the transcript request process in order to specify this. Select the print area in order to indicate where the system displays recipient name information. Your choices are *Do Not Display, Transcript Header,* and *Page Header.*

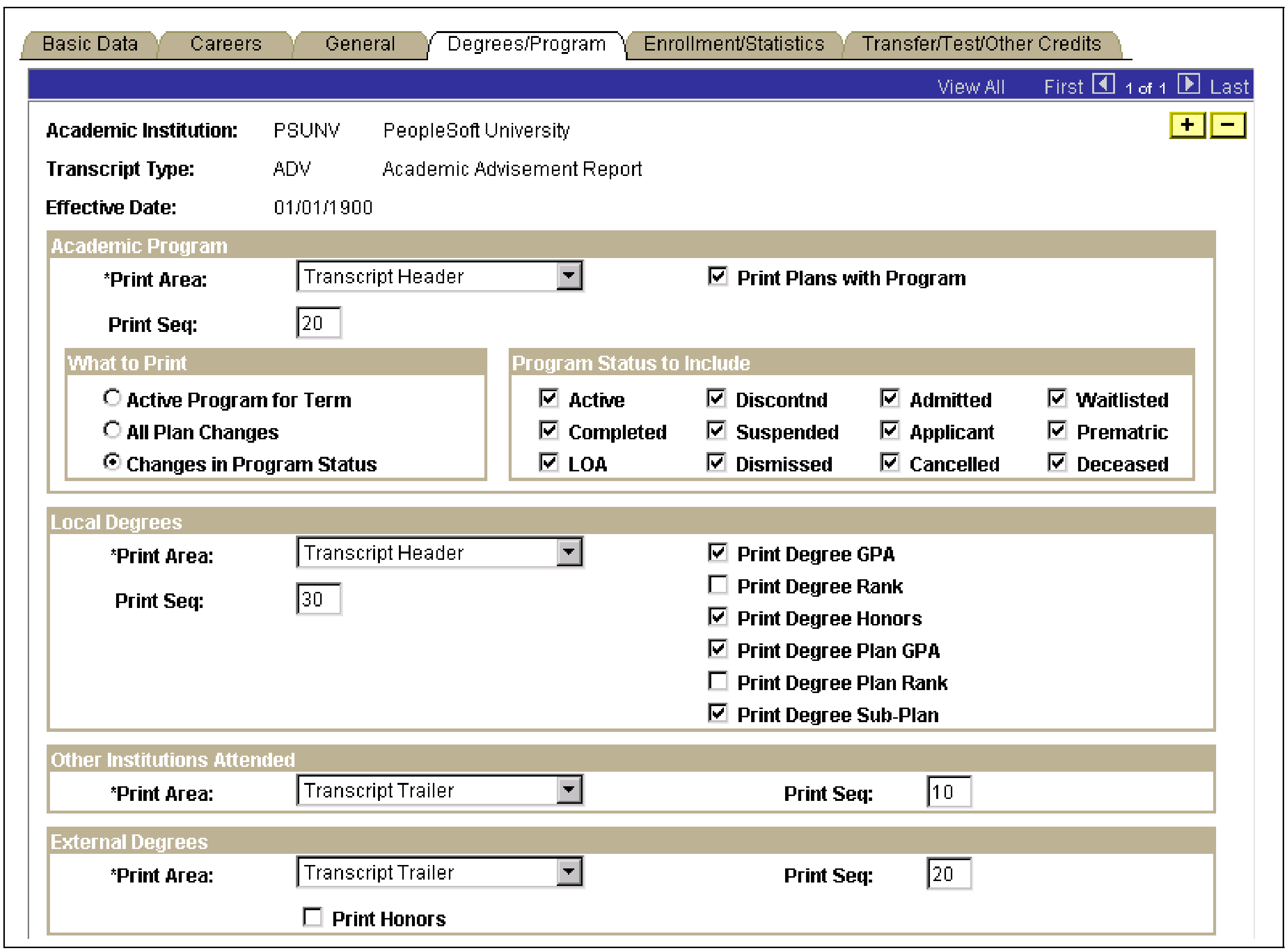
Recipient Print Seq The print sequence determines the order in which recipient information appears within the print area. The system populates the print sequence by default. You can change the value.

Basis of Admission Print Area Select the print area in order to indicate where the system displays basis of admission information. Your choices are *Do Not Display, Transcript Header,* and *Page Header.* If you select *Transcript Header* or *Page Header*, the system displays basis of admission information for students who have the Include in Transcript check box selected on the Basis of Admission page.

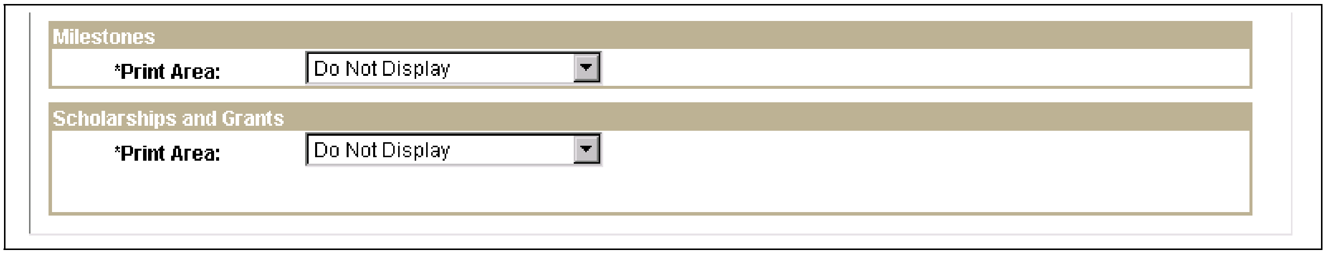
Basis of Admission Print Seq The print sequence determines the order in which basis of admission information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Degree and Program Data

Access the Degrees/Program page.



Degrees/Program page (1 of 2)



Degrees/Program page (2 of 2)

Academic Program Print Area

Select the print area in order to indicate where the system displays academic program information. Your choices are *Enrollment Header, Enrollment Trailer, Transcript Header,* and *Do Not Display.* Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort. Depending upon which print area you select, the system selects an option in the What to Print group box.

Academic Program Print Seq

The print sequence determines the order in which academic program information appears within the print area. The system populates the print sequence by default. You can change the value.

Print Plans with Program

Select this check box to display all of the academic plans associated with each of the student's reported programs.

What to Print

The system selects a What to Print option and a Program Status to Include check box based on your choice of academic program print area. These are defaults that you can not override.

If you select *Enrollment Header,* the system selects the Active Program for Term option and the value of *Active* for the Program Status to Include field.

If you select *Enrollment Trailer,* the system selects the Changes in Program Status option and the appropriate academic program status values become available for selection in the Program Status to Include group box. Select the appropriate academic program status values.

If you select *Transcript Header,* the What to Print group box becomes available for entry, and you can select which information to print. In addition, the Program Status to Include group box becomes available for entry. Select the appropriate academic program status values.

Local Degree Print Area

Local degrees are degrees that a student obtains at your institution. Select the print area in order to indicate where the system displays local degree information. Your choices are *Enrollment Header, Enrollment Trailer, Transcript Header, Transcript Trailer,* and *Do Not Display.* Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

Note. If you configure Local Degrees to print on the transcript, the system displays all degrees for the student across all of the student's careers, regardless of whether or not the degrees were earned in association with the specific career for which the transcript is reporting.

Local Degree Print Seq
The print sequence determines the order in which local degree information appears within the print area. The system populates the print sequence by default. You can change the value.

Other Institution Attended Print Area
The system extracts information for other institutions attended from the student's education component. Select the print area in order to indicate where the system displays other institutions attended. Your choices are *Transcript Header, Transcript Trailer* and *Do Not Display.* Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

Other Institution Attended Print Seq
The print sequence determines the order in which other institution attended information appears within the print area. The system populates the print sequence by default. You can change the value.

External Degree Print Area
The system extracts external degree information from the student's education component. Select the print area in order to indicate where the system displays external degree information. Your choices are *Transcript Header, Transcript Trailer,* and *Do Not Display.* Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

External Degree Print Seq
The print sequence determines the order in which external degree information appears within the print area. The system populates the print sequence by default. You can change the value.

Print Honors
Select this check box to display honors that the student received from other institutions.

Milestones Print Area
Select the print area in order to indicate where the system displays milestone information. Your choices are *Do Not Display* and *Transcript Trailer.* Print area values are delivered with your system on the print area Table page. Any modification to these values would require programming effort.

Milestones Print Seq
The print sequence determines the order in which milestone information appears within the print area. The system populates the print sequence by default. You can change the value.

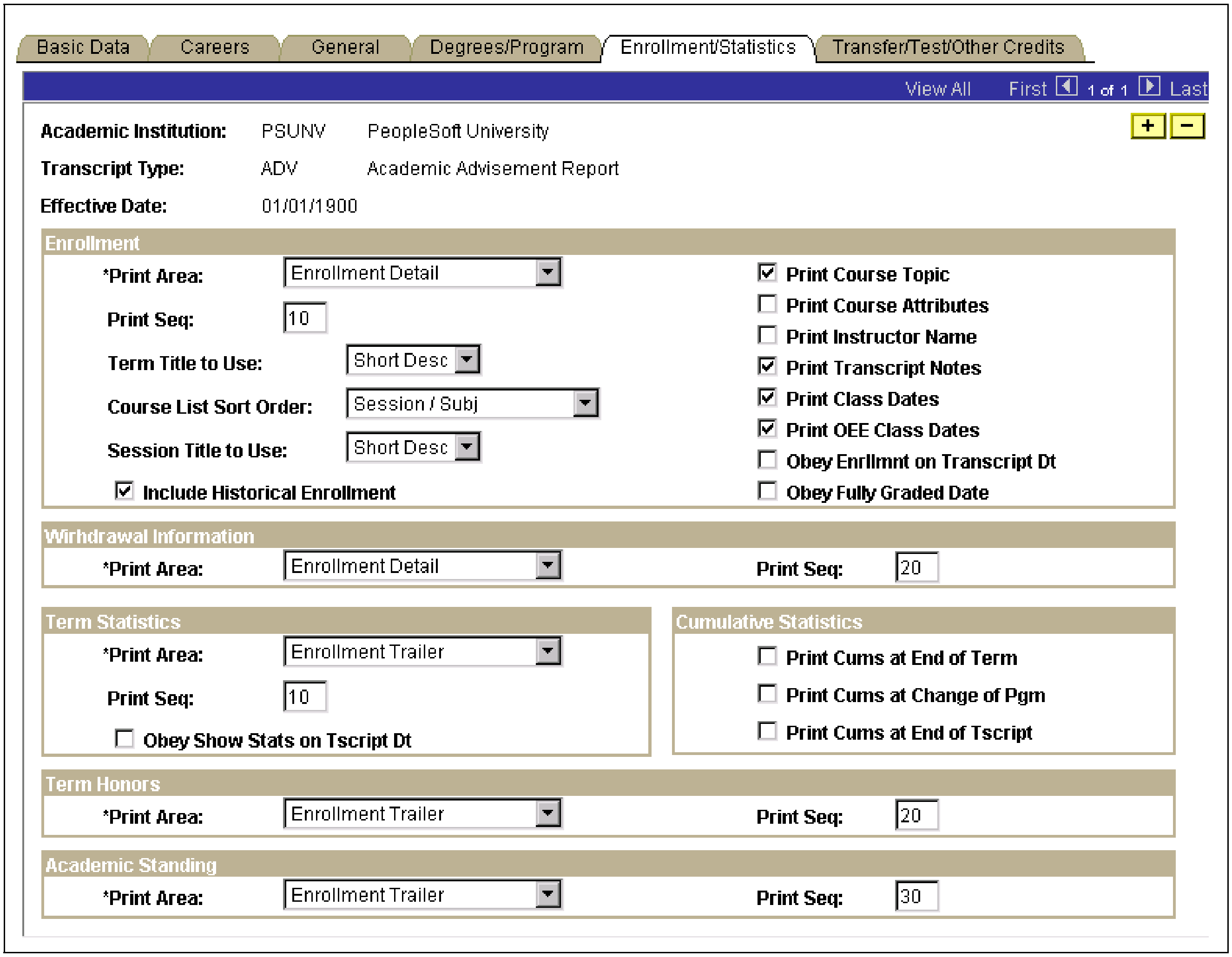
See Chapter 9, "Preparing to Track Student Data," Setting Up Milestones, page 219.

Scholarships and Grants Print Area
Select the print area in order to indicate where the system displays scholarship and grant information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are *Transcript Header, Transcript Trailer,* and *Do Not Display.* The system extracts other institution-attended information from the student's admissions record.

Scholarships and Grants Print Seq
The print sequence determines the order in which scholarships and grants information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Enrollment and Statistics Data

Access the Enrollment/Statistics page.



Enrollment/Statistics page

Enrollment Print Area

Select the print area in order to indicate where the system displays enrollment information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are *Enrollment Detail* and *Do Not Display.*

Enrollment Print Seq

The print sequence determines the sequence in which enrollment information appears within the print area. The system populates the print sequence by default. You can change this value.

Term Title to Use

Select the type of term title that you want to appear on the transcript. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are *Long Description* and *Short Description.*

Course List Sort Order Select the course list sort order in which the system displays courses within a term. You can select to sort by *Session Number and Subject Area,* or *Subject Area and Course Catalog Number.*

Session Title to Use If you select a course list sort order of *Session Number and Subject Area,* the Session Title to Use field becomes available for entry. Select the *Long Description* or *Short Description* of the session title that you want to appear on the transcript.

Include Historical Enrollment Select this check box for the system to display historical enrollment information that was entered into the Historical Course Enrollment page and its corresponding table.

This information is separate from the normal student enrollment data.

See Chapter 26, "Using Enrollment Related Processes," Creating Historical Enrollment Records, page 577.

Note. If you select the Include Historical Enrollment check box, be sure that you have set the Last Term for Historical Enrollment field to the latest term possible for historical enrollment records on the Academic Career Table page.

Also note that term *0000* will not allow historical enrollment data to print on a transcript. If you want historical enrollment data to print on a student's transcript, you must select a term value other than *0000.*

See *PeopleSoft Student Administration Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Careers, Setting Academic Career Parameters.*

Print Course Topic Displays course topics associated with specific courses.

Print Course Attributes Displays the course attributes associated with specific courses.

Print Instructor Name Displays the instructor name for each class.

Print Transcript Notes Displays the transcript notes attached to student enrollment records.

Print Class Dates Displays the class begin and end dates if set on the term/session table.

Print OEE Class Dates (print open entry/exit class dates) Displays the student's unique begin date for each Open Entry/Open Exit class taken.

Obey Enrollment on Transcript Date Select this check box for the system to display all enrollment information that is *fully enrolled* as of the transcript create date. The fully enrolled date is defined on the Academic Term Calendar 3 page. If you do not select this check box, all enrollment information that exists at the time the transcript processed will appear on the transcript.

Obey Fully Graded Date If you do not select this check box, partially graded terms and sessions print on the transcript.

Select this check box for the system to only display classes with fully graded dates less than or equal to the run date.

The fully graded date is defined on the Academic Term Calendar 3 page.

Withdrawal Information Print Area
Select the print area in order to indicate where the system displays for withdrawal information. Your choices are *Enrollment Detail* and *Do Not Display.*

Withdrawal Information Print Seq
The print sequence determines the order in which withdrawal information appears within the print area. The system populates the print sequence by default. You can change the value.

In the exhibit, the enrollment information appears prior to the withdrawal information because both types of information have a print area of enrollment detail, and the print sequence for withdrawal information is greater than the print sequence enrollment information.

Term Statistics Print Area
Select the print area in order to indicate where the system displays term statistics information. Your choices are *Enrollment Header, Enrollment Trailer,* and *Do Not Display.* The system calculates statistics when you run the grade posting process. Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

Term Statistics Print Seq
The print sequence determines the order in which term statistics information appears within the print area. The system populates the print sequence by default. You can change the value. In the exhibit, term statistics, term honors, and academic standing will print in the *Enrollment Trailer* area. Term statistics will print first because the print sequence is less than both term honors and academic standing print sequence numbers.

Obey Show Stats on Tscript Dt (obey show statistics on transcript date)
Select this check box for the system to display statistics only if the transcript process date is greater than or equal to the show statistics on transcript date value. The show statistics on transcript date value is defined on the Academic Calendar 3 page. If you do not select this check box, the system displays the statistics as of the last term.

Cumulative Statistics
The Cumulative Statistics group box enables you to determine where the system displays statistics. You can select the Print Cums at End of Term check box, or the Print Cums at Change of Program check box, but not both. You can select the Print Cums at End of Transcript check box on its own or in combination with one of the other check boxes.

Term Honors Print Area
Select the print area in order to indicate where the system displays term honors information. Your choices are *Enrollment Header, Enrollment Trailer,* and *Do Not Display.* Print area values are delivered with your system on the Print Area Table page. Any modification to these values would require programming effort.

Term Honors Print Seq
The print sequence determines the order in which term honors information appears within the print area. The system populates the print sequence by default. You can change the value.

Academic Standing Print Area
Select the print area in order to indicate where the system displays academic standing information. Your choices are *Enrollment Header, Enrollment Trailer,* and *Do Not Display.* Values for this field are delivered with your system as

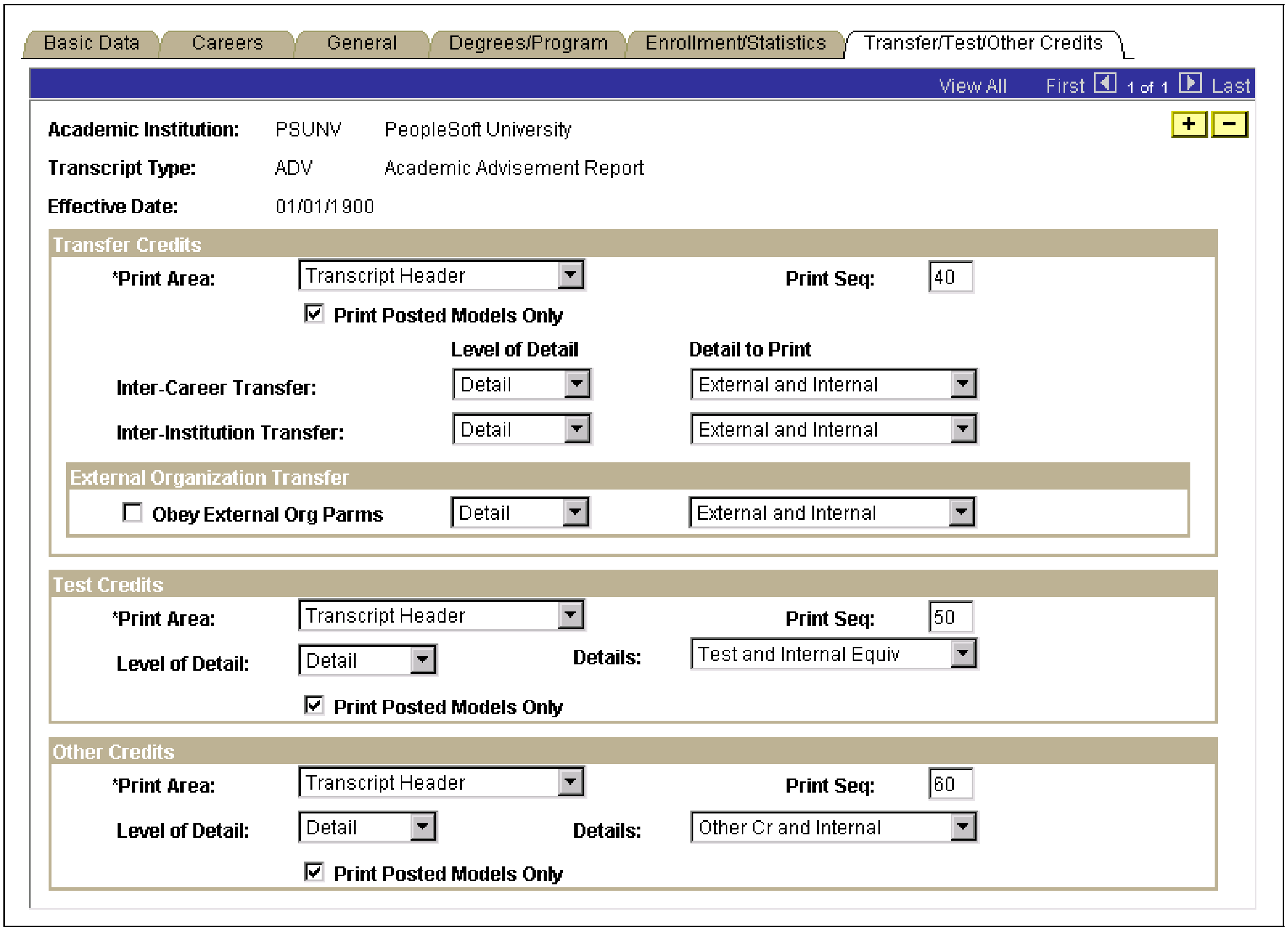
translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Academic Standing Print Seq

The print sequence determines the order in which academic standing information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Transfer/Test/Other Data

Access the Transfer/Test/Other Credits page.



Transcript Type - Transfer/Test/Other Credits page

Transfer Credits Print Area

Select the print area in order to indicate where the system displays Transfer Credit information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your print area choices are *Enrollment Detail, Enrollment Trailer, Transcript Header, Transcript Trailer,* and *Do Not Display.*

Note. If you select a value of *Enrollment Detail,* with a Level of Detail field value of *Detail,* the system will populate by default and make the following fields unavailable for entry: Print Posted Models Only: *Selected;* Inter-Career Transfer (Detail to Print): *Internal Equivalent Course;* Inter-Institution Transfer (Detail to Print): *Internal Equivalent Course;* and External Organization Transfer: *Internal Equivalent Course.*

Transfer Credits Print Seq

The print sequence determines the order in which transfer credit information appears within the print area. The system populates the print sequence by default. You can change the value.

Print Posted Models Only

If you select any print area other than Enrollment Detail, the Print Posted Models Only check box is available for entry. Select the Print Posted Models Only check box to display transfer credit from posted models only.

If this check box is available and you do not select it, transfer credit from all models (posted, completed, and not posted) appears.

Transfer credit print details are organized in three categories: *Inter-Career*, *Inter-Institution*, and *External Organization* transfers.

Inter-Career Transfer

Transfers from academic career to academic career (or academic program to academic program, same academic career) in your institution. The source of data is the student's enrollment record at your institution.

Inter-Institution Transfer

Transfer between an external institution with which your institution shares a database. The source of data is the student's enrollment record at the external institution, but with a shared database you can bypass the data entry of external courses.

Level of Detail

Select the level of detail to print for each type of transfer. Your choices are:

Summary: The system only displays total units transferred.

Detail: The system displays the course details, depending upon your selection in the Detail to Print field.

Detail to Print

If you select *Detail* in the Level of Detail field, the Detail to Print field becomes available for entry. Your choices are *External and Internal, External Courses,* and *Internal Equivalent Course.*

External Organization Transfer

Most transfers fall into this category. Transfers between an external institution and your institution. The source of data is the external organization and is entered as external coursework.

Obey External Org Parms (obey external organization parameters)

Select this check box to obey the external organization transfer credit parameters on the Organization Affiliation page. Normally you would select this check box in order for official transcripts to follow the defaults set for printing external transfer information.

Test Credits Print Area

Select the print area to indicate where the system displays test credit information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are *Enrollment Detail, Transcript Header, Transcript Trailer,* and *Do Not Display.*

Test Credits Print Seq The print sequence determines the order in which test credit information appears within the print area. The system populates the print sequence by default. You can change the value.

Level of Detail Select the level of detail to print for test credit. Your choices are:

Summary: The system displays only total test credit units.

Detail: The system displays the test credit details, depending upon your selection in the Details field.

Details If you select *Enrollment Detail* as the print area and a level of detail value of *Detail,* the system populates the Details field with *Internal Equivalent Course.* You cannot alter the details value.

If you select *Transcript Header* or *Transcript Trailer* as the print area, and a level of detail value of *Detail,* you can select which details to print. Your choices are *Internal Equivalent Course, Test and Internal Equivalents,* and *Test Credits.*

Note. If you select a level of detail of *Summary,* regardless of the print area you select, the Details field is unavailable for entry.

Print Posted Models Only If you select any print area other than enrollment detail, the Print Posted Models Only check box becomes available for entry. Select the Print Posted Models Only check box to display only test credit from posted models. If this check box is available but you do not select it, test credit from all models (posted and not posted) appears.

Other Credits Print Area Select the print area where other credit information will print. Print area values are delivered with your system in the Print Area Table page. Any modification to these values would require programming effort. Your choices are *Enrollment Detail, Transcript Header, Transcript Trailer,* and *Do Not Display.*

Other Credits Print Seq The system populates the print sequence by default. The print sequence determines the order in which other credit information appears within the print area. You can change the value.

Level of Detail Select the level of detail to print for other credit. Your choices are:

Summary: The system only displays the cumulative total of other credit units.

Detail: The system displays the other credit details, depending upon your selection in the Details field.

Details If you select *Enrollment Detail* as the print area and a level of detail value of *Detail,* the system populates the Details field with *Internal Equivalent Course.* You cannot alter the details value.

If you select *Transcript Header* or *Transcript Trailer* as the print area, and a level of detail value of *Detail,* you can select which details to print. Your choices are *Internal Equivalent Course, Other Credit and Internal Equivalents,* and *Other Credits.*

Note. If you select a level of detail of *Summary,* regardless of the print area you select, the Details field is unavailable for entry.

Print Posted Models Only

If you select any print area value other than *Enrollment Detail,* the Print Posted Models Only check box becomes available. Select the Print Posted Models Only check box in order for the system to display other credit from posted models only. If this check box is available and you do not select it, other credit from all models (posted and not posted) appears.

CHAPTER 14

Preparing to Consolidate and Report Academic Statistics

Before you can consolidate academic statistics and use them for reporting, you must perform prerequisite setup tasks. Once you have completed the prerequisites, you can run the Consolidate Academic Statistics process (SRPCCONP) to generate consolidated statistics data on students and, ultimately, create reports that are based on this data. This chapter discusses how to set up the following items for reporting:

- Academic institutions
- Academic careers and programs
- Academic level and load rules
- Student attributes
- Extracurricular activities
- Veterans' biographic and demographic data
- NSLC branch codes
- Statistic period types
- Academic statistics periods

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," page 821

Setting Up Academic Institutions for Reporting

Use the Academic Institution 3 page to set up the default student attribute for cohort that your academic institution uses for cohort reporting. Use this page also to define NSLC reporting options, such as the default Federal Interagency Committee on Education (FICE) code for your academic institution, and how the NSLC Extract process calculates each student's anticipated graduation date.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Designing Your Academic Structure," Defining Academic Institutions

Setting Up Academic Careers and Academic Programs for Reporting

Complete the following setup tasks for academic careers and programs:

- Define primacy for academic careers on the Academic Career Table 2 page and for programs on the Program 2 page.

  Because reporting agencies require that you report a student at a given point in time under one academic career and one academic program, define primacy for all academic careers and programs. When the Consolidate Academic Statistics process (SRPCCONP) encounters a student who is active in multiple academic careers or academic programs for an academic statistics period, the process locates the student's primary academic career and program, based on the student's academic career and program that have the lowest primacy number at the academic institution. The process consolidates all of the student's academic career, program, level, load, and other academic statistic information into one record for reporting. For example, a student might be actively enrolled in a JD program and an MA program. These academic programs might be within different academic careers. At any point in time, the student might be enrolled part-time in the JD program and part-time in the MA program. By defining primacy, the Consolidate Academic Statistics process can calculate a student's level and load under one primary academic career and program, using *all* the level and load elements on a student's record. If the JD program has the lower primacy number at the academic institution, the student is reported full-time under the JD program. The process uses the institutional-level primacy rather than the student-level primacy so that the reports always coincide with your institution's financial aid processing.

- Indicate, on the Academic Career Table 2 page, whether an academic career qualifies as graduate level for tax reporting and NSLC reporting.

- Indicate, on the Program 2 page, whether students in an academic program are eligible for financial aid.

  The Consolidate Academic Statistics process excludes from its process calculations the academic programs in which students are not eligible for financial aid.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Designing Your Academic Structure," Setting Additional Academic Career Parameters

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Programs, Plans, and Subplans," Setting Up Defaults for Academic Programs

Setting Up Academic Level and Load Rules for Reporting

Use the Level/Load Rules component to define academic level and load rules for *every* academic career. The Consolidate Academic Statistics process (SRPCCONP) uses the defined rules to locate a student's academic level and load.

See Also

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Defining Academic Level and Load Rules, page 25

Setting Up Student Attributes for Reporting

Use the Student Attributes page to assign student attribute and student attribute values to a student, and to indicate the primacy of each one. The Consolidate Academic Statistics process (SRPCCONP) locates a student's primary cohort based on the data on this page. You can then use students' primary cohort data for reporting and analysis.

See Also

Chapter 31, "Tracking Student Data," Tracking Student Attributes, page 710

Setting Up Extracurricular Activities for Reporting

Use the Extracurricular Activity Table page to define extracurricular activity codes and to define the primacy of the extracurricular activities for your setID. Before you can track extracurricular activities for students, set up these extracurricular activity codes. Once you have set up the codes, you can use the Extracurricular Activity page in PeopleSoft Student Records or PeopleSoft Recruiting and Admissions to track extracurricular activities for individuals.

See Also

Chapter 31, "Tracking Student Data," Tracking Extracurricular Activities, page 708

Setting Up Biographic and Demographic Data for Veterans Reporting

Use the Bio/Demo Data component to indicate whether your institution is disbursing veteran benefits for a student. You can use this information, in conjunction with the Consolidate Academic Statistics process (SRPCCONP) and the Veterans Report process, to produce a hard-copy report listing all the students who receive veterans benefits at your institution. Then you can send the report to the Veterans Administration as required by the federal government.

On the Bio/Demo Data page, select the VA Benefits check box to indicate that the student receives veterans benefits. Use the Addresses page to indicate where the veterans benefits check is to be sent. The Veterans Administration needs this data to verify that the address they have for the recipient matches the address that your institution has. When you run the Veterans report, the report uses the address that you enter for the veterans address type.

To accurately report a student's academic load to the Veterans Administration, run the Consolidate Academic Statistics process before running the Veterans Report process to produce the report. When you run the Consolidate Academic Statistics process, it locates a student's academic load, based on their primary academic career and program, then stores the student's academic load in the consolidated statistics table. When you run the Veterans Report process, it uses the academic load in the consolidated statistics table for the report.

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," page 821

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering and Updating Basic Bio/Demo Data

Setting Up Branch Codes for NSLC Reporting

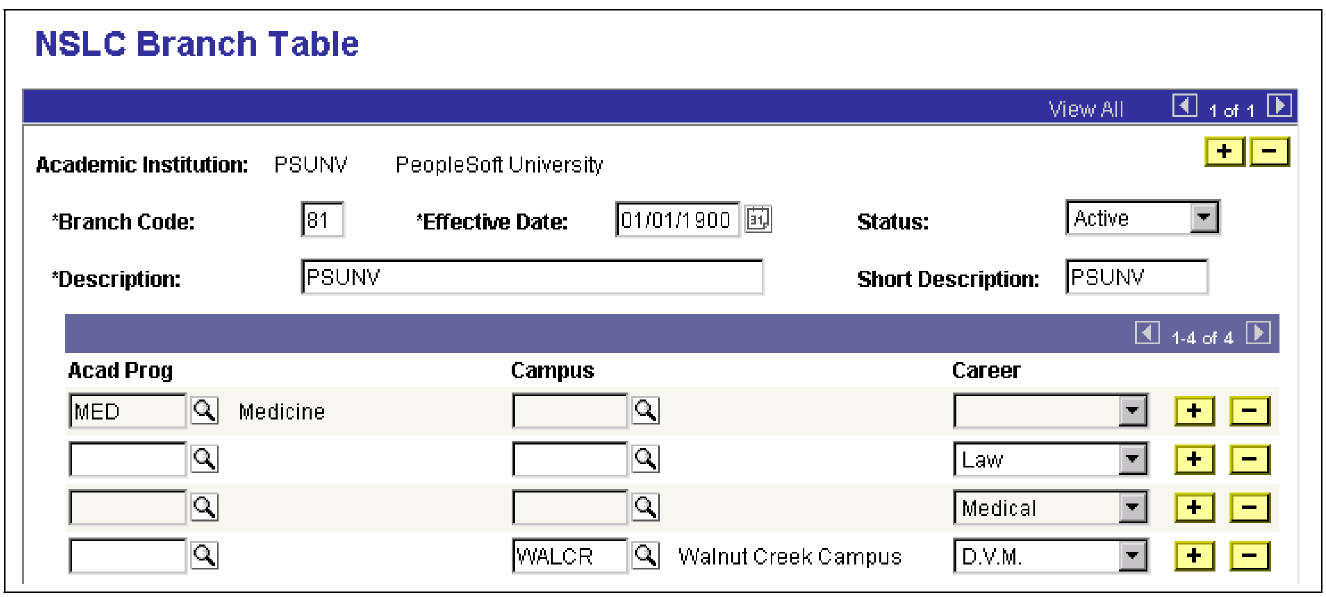
This section discusses how to define branch codes for National Student Clearinghouse (NSLC) reporting.

Page Used to Set Up NSLC Branch Codes

Page Name	Object Name	Navigation	Usage
NSLC Branch Table (National Student Clearinghouse branch table)	NSLC_BRANCH_TBL	Design Student Administration, Define Student Records, Setup, NSLC Branch Table	Define the branch codes that your academic institution uses when reporting enrollment status to the NSLC.

Defining NSLC Branch Codes

Access the NSLC Branch Table page.



NSLC Branch Table page

The NSLC requires that your institution defines a branch code for each group of students that has its own reporting timeline. For example, if you have multiple campuses at your academic institution, and you are reporting each of these campuses separately to the NSLC at different times of the year, you might use a different branch code for each campus.

Another example is if your institution has academic programs that are running on different calendars. For instance, your institution has a law program, a medical program, an undergraduate program, and a graduate program. Whereas the undergraduate and graduate programs might run on a semester term type, the law and medical programs might run on quarter term type. In such a case, your institution might use different branch codes for the semester programs and the quarter programs.

Academic Institution Select the academic institution for which you are defining the branch code.

Branch Code Enter the branch code for the academic institution according to the NSLC contractual agreement.

Acad Prog (academic program) Select the academic program associated with this branch code so that when you run the NSLC Extract process, it reports data for only these students. (Optional)

Campus Select the campus associated with this branch code so that when you run the NSLC Extract process, it reports data for only these students. (Optional)

Career Select the academic career associated with this branch code so that when you run the NSLC Extract process, it reports data for only these students. (Optional)

Setting Up Statistic Period Types

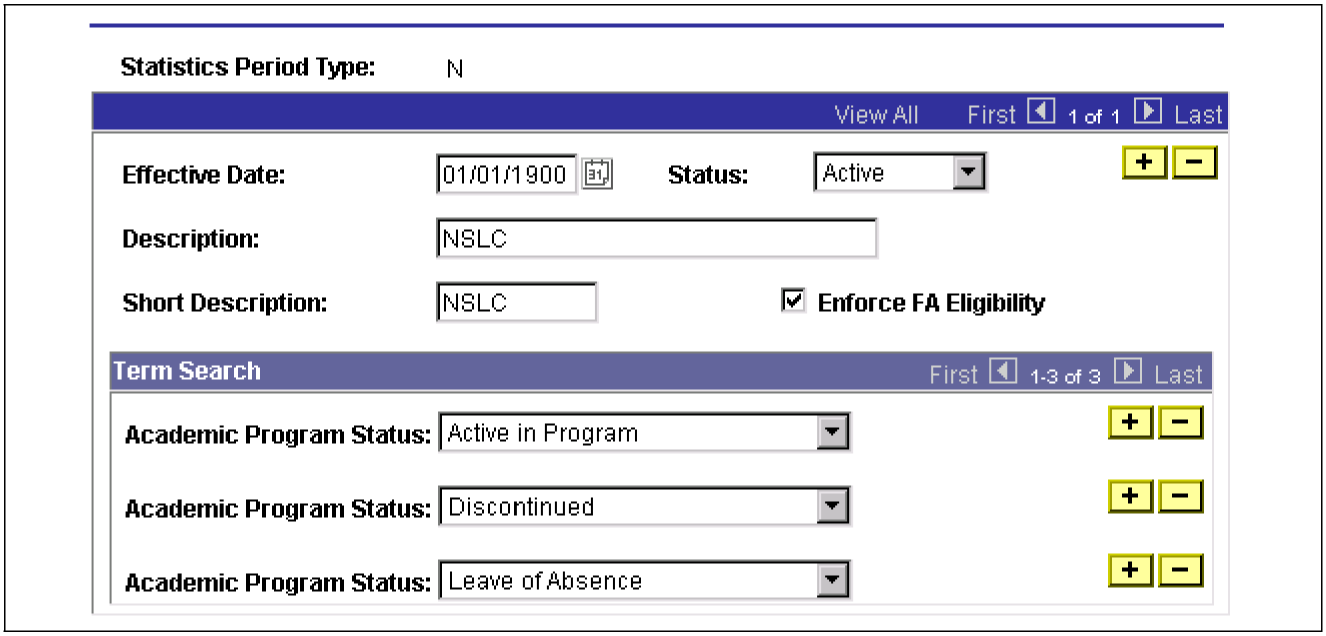
This section discusses now to define statistic period types.

Page Used to Set Up Statistic Period Types

Page Name	Object Name	Navigation	Usage
Academic Statistic Type	ACAD_STAT_TYPE	Design Student Administration, Design Academic Structure, Setup, Academic Statistics Type	Define statistics period types.

Defining Statistics Period Types

Access the Academic Statistic Type page.



Academic Statistics Type page

Statistics period types are descriptors of an academic statistics period, helping to identify the type of reporting requirement that relates to a particular academic statistics period. For example, you might define the statistics period type *IP* for IPEDS reporting, *N* for NSLC reporting, and *SR* for the Student Record Census report. You'll later attach statistics period types to academic statistics periods on the Academic Statistics Period page.

Enforce FA Eligibility (enforce financial aid eligibility)

Select to have the Consolidate Academic Statistics process (SRPCCONP) use the value of the Financial Aid Eligible check box, on the Program 2 page, for this statistics period type.

Clear this check box to have the Consolidate Academic Statistics process disregard the value of the Financial Aid Eligible check box, on the Program 2 page, for this statistics period type. The Consolidate Academic Statistics process will thus retrieve all students that meet its processing parameters, regardless of the financial aid eligibility of the student's academic program.

For example, you would clear this check box for any statistics period type in which you need to report statistics for all students regardless of their financial aid eligibility, such as with the NSLC Extract report or the IPEDS report.

Academic Program Status

Select the students' academic program status for the Consolidate Academic Statistics process to consider as valid and include in its results. For an academic statistics period to which this statistics period type is attached, the Consolidate Academic Statistics process will include in its results only the students with the academic program statuses specified here. Thus, you can define various statistics period types for different reporting needs. For example, you can define a statistics period type for NSLC reporting that includes all of the academic program statuses that your institution is required to report to the NSLC.

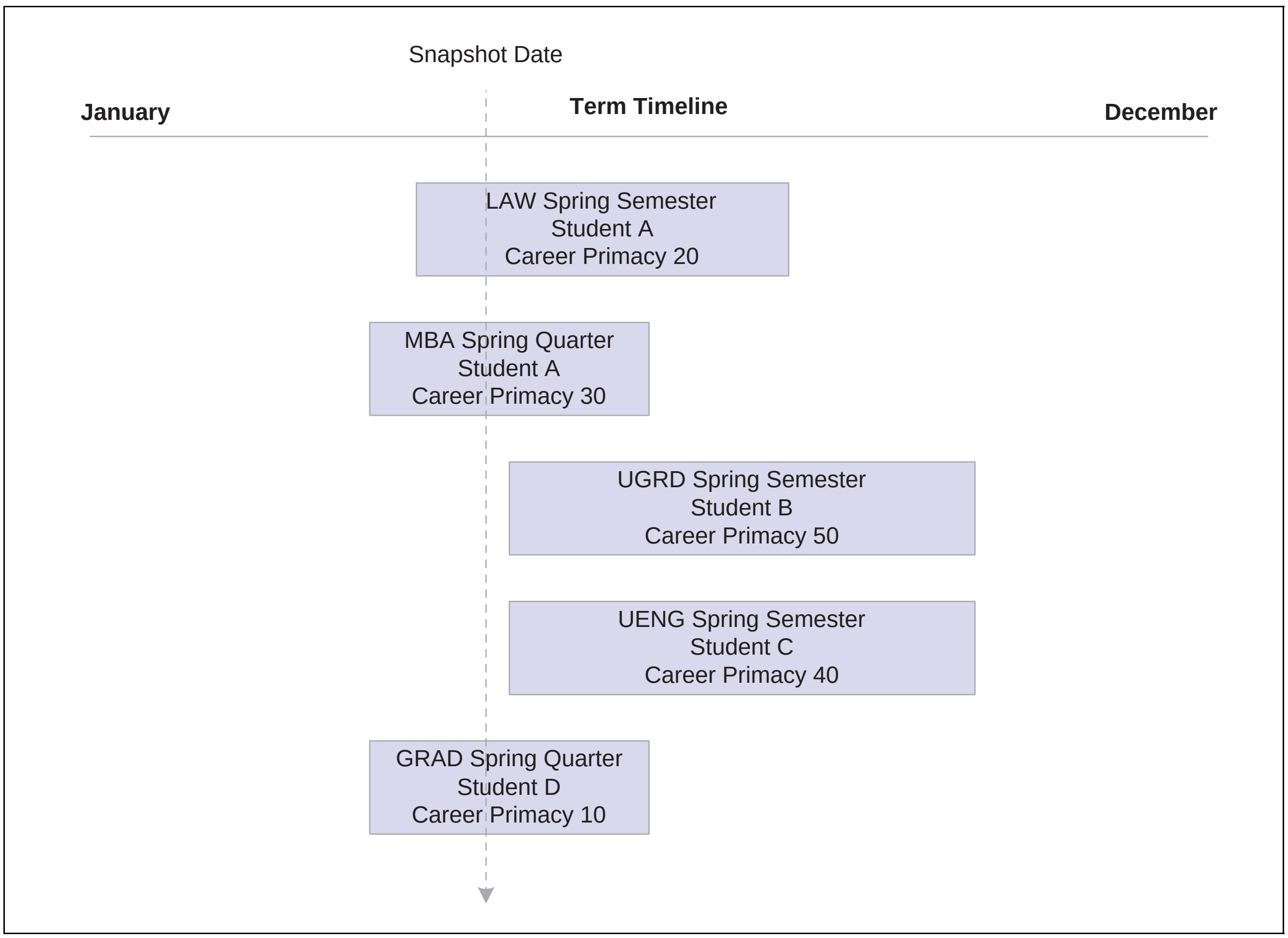
Setting Up Academic Statistics Periods

This section provides an overview of academic statistic periods and discusses how to define them.

Understanding Academic Statistics Periods

An academic statistics period is the rule that the Consolidate Academic Statistics process (SRPCCONP) uses to control exactly when and how it will function. An academic statistics period defines the valid academic career and term combinations that the Consolidate Academic Statistics process uses to collect various academic statistics for students. An academic statistics period also defines the academic level and load rules and the statistics period type that the process uses.

The Consolidate Academic Statistics process locates the valid academic career and term combinations, based on the snapshot date for the academic statistics period. Valid academic career and term combinations can overlap each other and start and end independently yet can also roll up into one academic statistics period. You can even roll up different term values, such as semesters and quarters, into one academic statistics period. In the following example, the semester and quarter terms from different academic careers roll up into one academic statistics period:



Example of an academic statistics period across terms

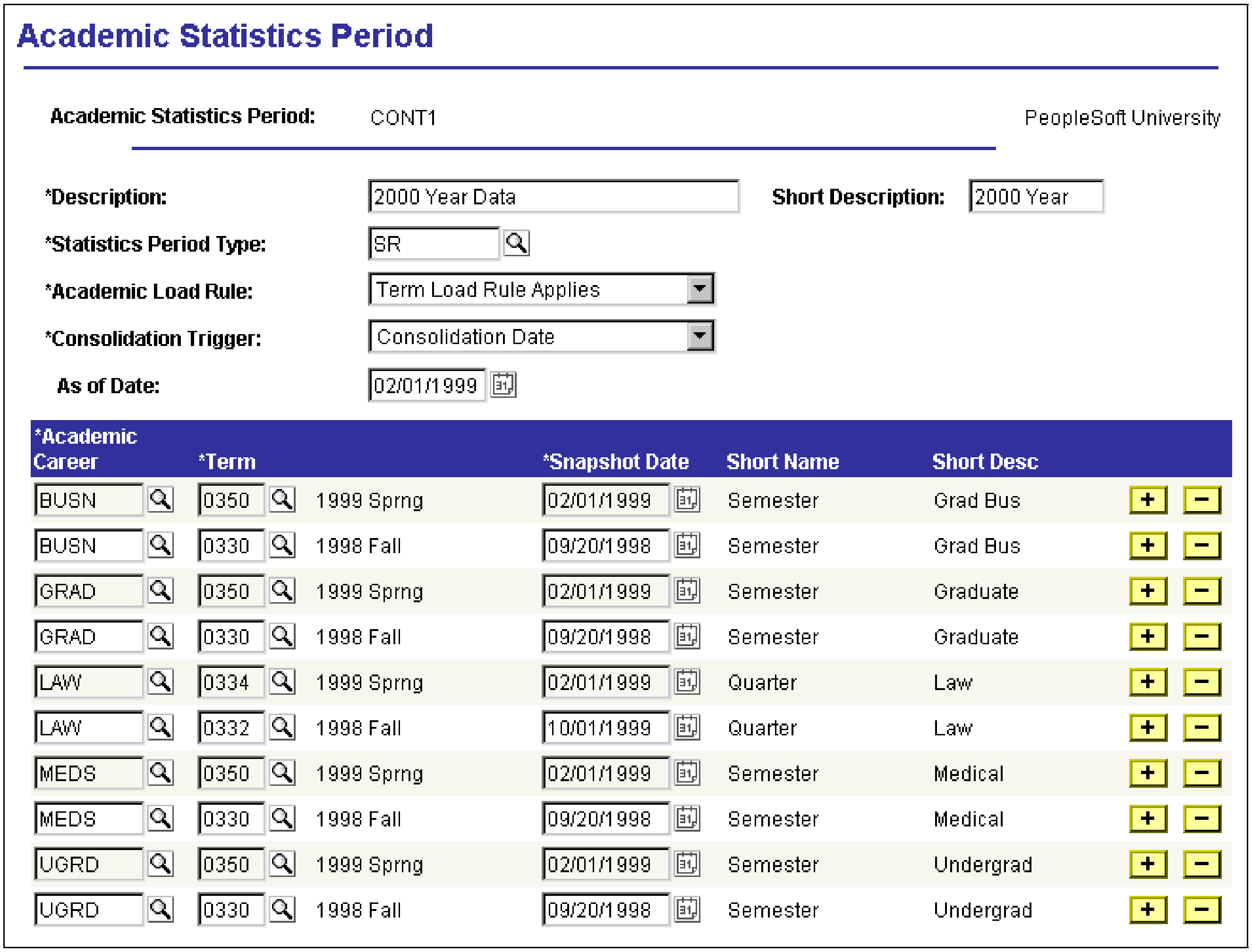
The vertical line defines the valid academic career and term combinations for the academic statistics period. The Consolidate Academic Statistics process gathers data for students in all academic career and term combinations that the line passes through. If a student has only one academic career in these terms, the process calculation is straightforward. However, if a student has multiple academic careers in these terms, such as how Student A has LAW and MBA academic careers, the process uses the academic career with the lowest primacy number to calculate the student's academic statistics. In this scenario, the process uses LAW as the primary academic career for Student A and converts the student's MBA units from quarter units to semester units.

Page Used to Set Up Academic Statistics Periods

Page Name	Object Name	Navigation	Usage
Academic Statistics Period	ACAD_STATS_PERIOD	Design Student Administration, Design Academic Structure, Setup, Academic Statistics Period	Describe an academic statistics period, including the statistics period type, academic load rule, consolidation trigger, and snapshot date.

Defining Academic Statistics Periods

Access the Academic Statistics Period page.



Academic Statistics Period

Academic Statistics Period: CONT1 PeopleSoft University

***Description:** 2000 Year Data **Short Description:** 2000 Year

***Statistics Period Type:** SR

***Academic Load Rule:** Term Load Rule Applies

***Consolidation Trigger:** Consolidation Date

As of Date: 02/01/1999

*Academic Career	*Term		*Snapshot Date	Short Name	Short Desc
BUSN	0350	1999 Sprng	02/01/1999	Semester	Grad Bus
BUSN	0330	1998 Fall	09/20/1998	Semester	Grad Bus
GRAD	0350	1999 Sprng	02/01/1999	Semester	Graduate
GRAD	0330	1998 Fall	09/20/1998	Semester	Graduate
LAW	0334	1999 Sprng	02/01/1999	Quarter	Law
LAW	0332	1998 Fall	10/01/1999	Quarter	Law
MEDS	0350	1999 Sprng	02/01/1999	Semester	Medical
MEDS	0330	1998 Fall	09/20/1998	Semester	Medical
UGRD	0350	1999 Sprng	02/01/1999	Semester	Undergrad
UGRD	0330	1998 Fall	09/20/1998	Semester	Undergrad

Academic Statistics Period page

Setting Up Academic Statistics Periods

Description and **Short Description**

Enter a description and short description for this academic statistics period. The system uses these descriptions on various pages to identify this academic statistics period.

The system also uses these descriptions for the header record of the NSLC Extract report. The NSLC requires that the header record of the extract include the academic term for the reported data, such as spring 2001 or fall 2001. Be sure to include this information in the descriptions as necessary. For NSLC academic statistics periods, use descriptions such as *Fall 2001-1st NSLC Run, Fall 2001-2nd NSLC Run,* and *Fall 2001-3rd NSLC Run* so that your institution can distinguish between the numerous runs of the NSLC Extract report. The detailed descriptions are especially useful if you are running the NSLC Extract process multiple times within the same reporting period. By specifying, on the Consolidated Statistics page, the academic statistics period used as the source for the previous NSLC extract, you can easily distinguish between the statistics of the previous NSLC extract and the next NSLC extract.

Statistics Period Type

Select a statistics period type, which is a descriptor of an academic statistics period. The statistics period type identifies the type of reporting requirement for which you are using this academic statistics period. For example, you might have defined the statistics period type *IP* for IPEDS reporting, *N* for NSLC reporting, and *SR* for the Student Record Census report. Because the statistics period type can affect the results of the Consolidate Academic Statistic process and the reports derived from these results, be sure that you select a statistics period type that meets your reporting needs.

Academic Load Rule

Select the academic load rule for the system to use when consolidating academic statistics. The Consolidate Academic Statistics process (SRPCCONP) uses your selection to calculate each student's academic load: full-time, half-time, part-time.

Term Load Rule Applies: When you run the Consolidate Academic Statistics process for an academic statistics period in which you have set this field to *Term Load Rule Applies* and the Load Determination field on the Level/Load Rules Table page to *Units,* the Consolidate Academic Statistics process uses the defined academic load rules from the Academic Level Table page to calculate a student's academic load, NSLC academic load, and financial aid load. If you have set the Load Determination field on the Level/Load Rules Table page to *manual* or *default,* the Consolidate Academic Statistics process uses the student's career-term record or the value you enter in the Default Academic Load field, respectively, to calculate the student's academic loads, regardless of the setting for this field.

Contiguous Terms: Contiguous terms are consecutive terms in which you combine academic load information. Use this option for your academic load rule when you are combining student career-term records for consecutive terms. When you run the Consolidate Academic Statistics process for an academic statistics period in which you have set this field to *Contiguous Terms,* the Consolidate Academic Statistics process uses the defined contiguous-term academic load rules from the Statistics Period Load page to calculate a student's academic load, NSLC academic load, and financial aid load. Thus, the process is able to accurately reflect each student's academic load for the combined terms.

For example, if 12 units equals a full-time academic load for an individual-term academic load rule, but you want to combine two consecutive terms during the Consolidate Academic statistics process, indicate on the Statistics Period Load page that 24 units equals a full-time academic load. If you do not define contiguous-term academic load rules, the Consolidate Academic Statistics process will report anyone with 12 or more units as full-time for that academic statistics period, which might not accurately reflect your data.

Consolidation Trigger

Select from the following choices the consolidation trigger to instruct the Consolidate Academic Statistics process which snapshot date to use. The snapshot date is the date that the process uses to locate the valid academic career and term combinations for this academic statistics period.

Note. If you select a consolidation trigger of *As of Date* or *As of Today,* the Consolidate Academic Statistics process takes the class start and end dates for all classes in which the student is actively enrolled and compares it to the snapshot date to determine if a student's class units should count towards her or his academic level and load calculation.

As of Date: Select to have the Consolidate Academic Statistics process base the snapshot date on the date in the As of Date field.

As of Today: Select to have the Consolidate Academic Statistics process base the snapshot date on the current system date when you run the process.

Consolidation Date: Select to have the Consolidate Academic Statistics process base the consolidation date on the date in the As of Date field.

When you select this option, a grid in the lower portion of the page appears for you to specify multiple academic career and terms combinations for which to take numerous snapshot dates. The snapshot dates listed on each row in the grid are the actual dates that the Recurring Term Snapshot process (SRPCCONU) *must* be run to calculate the statistics for all students active in that academic career and term combination.

The Recurring Term Snapshot process retrieves the STDNT_CAR_TERM information for each student active in the specified academic career and term combination as of the specified snapshot date for the corresponding row in the grid. The process stores these values in a temporary holding table called the PS_STDNT_CARTRM_PD table.

After the Recurring Term Snapshot process retrieves data for all rows listed in the grid, you must then run the Consolidate Academic Statistics process (SRPCCONP), which uses the date in the As of Date field as the effective date for all records that it generates. For the process to complete for a student, the student must be active in the specified academic career for which you are running the process and have records in the temporary holding table (PS_STDNT_CARTRM_PD).

As of Date

This field becomes available when you select *As of Date* or *Consolidation Date* in the Consolidation Trigger field. If you select *As of Date* as your consolidation trigger, the Consolidate Academic Statistics process uses this date as the snapshot date. If you select *Consolidation Date* as your consolidation trigger, the Consolidate Academic Statistics process uses the date in this field as the effective date for all records that it generates. The date in this field must be after the latest snapshot date in the grid in the lower portion of this page. This ensures that the academic statistics for all of the academic career and term combinations have been gathered and stored in the temporary holding table prior to consolidation.

Defining Valid Academic Career, Term, and Snapshot Date Combinations

When you define an academic statistics period to have *Consolidation Date* for its *Consolidation Trigger,* the system displays a grid in the lower portion of that page for you to enter the specific academic career, term, and snapshot date combinations to include in this academic statistics period. When you run the Take Recurring Term Snapshot process, it accepts as valid only the combinations on this grid for the given academic statistics period. The process gathers the most current statistics on students active in these academic career and term combinations as of the run date, then stores this data in a temporary holding table (PS_STDNT_CARTRM_PD) for future consolidation through the Consolidate Academic Statistics process.

To gather statistics that reflect different times of the year, you must run the Take Recurring Term Snapshot process on a regular basis because the statistics themselves are based on the run date, not the snapshot date.

For example, perhaps you have a fall semester and an a spring semester for each of your academic careers and your want to combine the historic academic statistics for all of these academic career and term combinations so that you have year-long academic statistics for your entire academic institution.

In the grid, indicate that you want to take one snapshot in the fall term and one snapshot in the spring term for each academic career. Set the academic statistics period to a consolidation mode of *insert* so that you do not overwrite the data in the temporary holding table on subsequent runs of the Take Recurring Term Snapshot process.

On or shortly following each snapshot date for all of the academic career and term combinations listed for the academic statistics period, run the Take Recurring Term Snapshot process (through the Consolidated Statistics page) to capture the data current as of the run date for these academic career and term combinations. The process writes the data to the temporary holding table.

After running the Recurring Term Snapshot process for all of the academic career and term combinations listed for the academic statistics period, run the Consolidate Academic Statistics process to consolidate the academic statistics for this academic statistics period. The process consolidates each student's academic statistics for all applicable rows in the temporary holding table.

Academic Career Select the academic career that the Take Recurring Term Snapshot process will consider as part of a valid combination for this academic statistics period.

Term Select the term within the academic career that the Take Recurring Term Snapshot process will consider as part of a valid combination for this academic statistics period.

Snapshot Date Select the date that the Take Recurring Term Snapshot process should be run for this academic career and term combination. For the process to consider this academic career and term combination valid, the term must be in progress as of the specified date.

Note. If you select a consolidation trigger of *As of Date* or *As of Today,* the Consolidate Academic Statistics process takes the class start and end dates for all classes in which the student is actively enrolled and compares it to the snapshot date to determine if a student's class units should count towards her or his academic level and load calculation.

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 826

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Defining Academic Level and Load Rules, page 25

Chapter 15

(CAN) Setting Up Canadian Government Reporting

This chapter provides an overview of the PeopleSoft Canadian Government Reporting process, and discusses how to:

- Define Canadian reporting business units.
- Review delivered report types and element numbers.
- Define element classifications.
- Define report periods.
- Review delivered government element codes.
- Review delivered county and country codes.
- Review delivered language, school, and CIS (common information system) language codes.
- Define provincial codes.
- Define general mapping tables.
- Define school reporting classifications.
- Define address and phone usage reporting entries.
- Define program mapping values.
- Define plan mapping tables.
- Define CIS program, plan, and subplan tables.
- Define ESIS (extended student information system) course data.
- Map Canadian school codes to external organizations.
- Define ESIS student data.
- Load the Student ID table.

See Also

Chapter 38, "(CAN) Generating Canadian Government Reports," page 865

Understanding Canadian Government Reporting

All post-secondary schools in Canada are required to report specific information to the federal and provincial governments. The PeopleSoft Canadian Government Reporting feature enables users to generate files in formats specified by the government. Using the PeopleSoft Canadian Government Reporting feature, you can extract reports in the following file formats:

- ESIS - Extended Student Information System
- USISE - University Student Information System Enrollment Reporting
- CIS - Common Information System
- MET - Ministry of Education and Training Financial Reporting
- OUAC - Ontario Universities' Application Center Reporting

You must complete a series of setup steps for each of the reports. Some of the steps include setting up very basic data (for example, country codes), and PeopleSoft provides the data for you. Other steps are user defined, and you will need to closely follow the setup steps to ensure that your system is ready for reporting.

Once you complete the setup steps, you can populate a table with students who are eligible for reporting.

The flat file generation process is a separate step that you can initiate after you run the extract program. You are then responsible for running the flat file through the government edits. If you find any errors and would like to make edits, you can do so without overwriting source data.

In addition, you can freeze a reporting period so that the system does not add students or modify them as of a specified date. The reporting extract process can be rerun as often as you require. When the data in the flat file is correct, you can archive the report extract tables.

Finally, all government elements are defined by element class and mapping classes. The element class determines what type of calculation or conversion needs to take place in order for the system to report the information in a code the government specifies. The five element classifications are listed in the following table:

Element Classification Type	Description
Classification Mapping (CM)	Use when there is a direct mapping of the data, but you would only report this element in certain circumstances. For example, you may have to report the student's maiden name. You would specify the mapping field of Maiden_Name on the Names table where the Name_type is equal to a particular value (in this case it would be 'MDN' for maiden). Note that the selection criteria field must be on the same record as the mapped field.
Direct Mapping (DM)	Use when there is a direct mapping of the data. Conversion from PeopleSoft values to government code is not required. The PeopleSoft record and field names are entered in the Direct Mapping Table for these elements.

Element Classification Type	Description
Master Mapping (MM)	Use when there is a direct mapping of the data, but you must convert the PeopleSoft value to the Government Reporting Value. You must enter conversion codes in the Master Mapping Table in order for the system to report the government values.
Separate Mapping (SM)	Similar to Master Mapping, except the number of values to be mapped is greater than 15. PeopleSoft provides a separate conversion table that holds the converted values.
Rules Based Mapping (RB)	This classification applies to elements that: • Cannot be derived directly from the database. • Require a separate mapping for each government code value. • Require complex institution-specific calculations. All rules based elements are identified by report type with a unique procedure number. The reports extract program uses this number to execute the associated logic. Each report type procedure number starts at *1,* except MET reporting, which starts at *201.* You cannot duplicate procedure numbers within a report type. Any changes to the rule based mapping procedure values will require a customization of the reports.

Note. If you decide that a mapping change is required, you must ensure that the key structure of the new table allows the retrieval of a unique record. If a key field is required, then you must provide the field name and value for every student on the Student List page.

See Also

Chapter 15, "(CAN) Setting Up Canadian Government Reporting," Loading the Student ID Table, page 338

Defining Canadian Reporting Business Units

This section discusses how to define Canadian business units.

Pages Used to Define Canadian Business Units

Page Name	Object Name	Navigation	Usage
General	BUS_UNIT_TBL_RP	Government Reporting, Government Reporting Canada, Setup Def, Business Unit Table, General	ESIS: Define business unit descriptions.
Unit Defaults	BUS_UNIT_TBL_RP2	Government Reporting, Government Reporting Canada, Setup Def, Business Unit Table, Unit Defaults	ESIS: Define business unit defaults.
Career Usage	CAREER_USAGE_TBL	Government Reporting, Government Reporting Canada, Setup Def, Business Unit Table, Career Usage	ESIS: Define career usage values.

Defining Canadian Reporting Business Unit Descriptions

Access the General page.

Institution Enter the institution for which you want to define the reporting business unit.

Institution Cd (institution code) Enter the institution's reporting code.

Province Enter the province in which the reporting institution is located. This entry controls the view of the provincial codes on all of the pages (for this business unit) that are keyed by province.

Type of Student ID Enter the type of ID that the reporting institution uses to identify students.

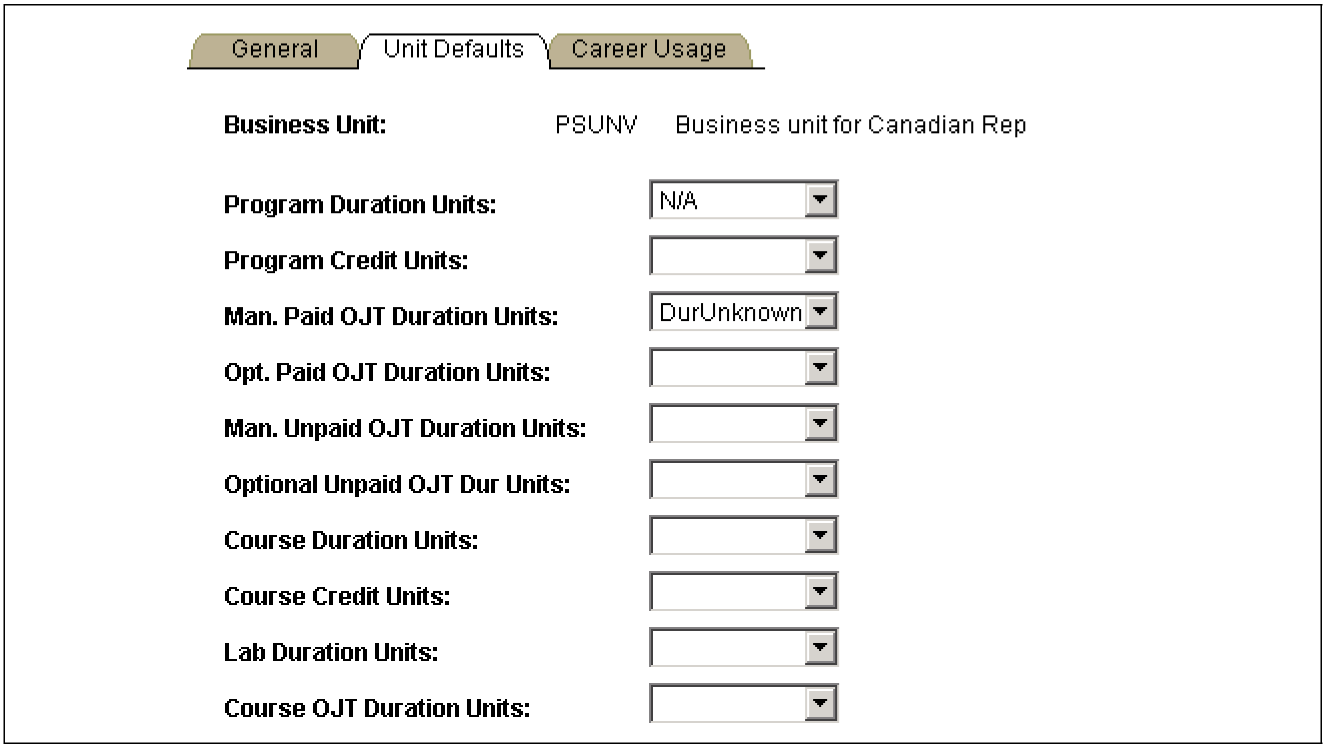
Sending Inst Type of Code (sending institution type of code) Enter the sending institution's type of program or course code that it uses to identify transfer credits.

Receiving Inst Type of Code (receiving institution type of code) Enter the receiving institution's type of program or course code that it uses to identify transfer credits.

Institution has Honour Roll Select to indicate that the institution tracks academic excellence. You must select this check box in order for the extract program to generate a value other than the default value for Element 5140.

Defining Canadian Reporting Business Unit Defaults

Access the Unit Defaults page.



Unit Defaults page

Program Duration Units

Enter the unit of measure that defines the normal time that a full-time student requires to complete the program.

Program Credit Units

Enter the unit of measure that defines the number of credits or units of academic achievement that a full-time student requires to graduate from or complete the program.

Man. Paid OJT Duration Units (mandatory paid on the job training duration units)

Enter the unit of measure that defines the duration of mandatory paid on-the-job training.

Opt. Paid OJT Duration Units (optional paid on the job training duration units)

Enter the unit of measure that defines the duration of optional paid on-the-job training.

Man. Unpaid OJT Duration Units (mandatory unpaid on the job training duration units)

Enter the unit of measure that defines the duration of mandatory unpaid on-the-job training.

Optional Unpaid OJT Dur Units (optional unpaid on the job training duration units)

Enter the unit of measure that defines the duration of optional unpaid on-the-job training.

Course Duration Units

Enter the unit of measure that defines the normal time a full-time student requires to complete the course by way of traditional course delivery.

Course Credit Units

Enter the unit of measure that defines the number of credits or units typically awarded for successful completion of the course.

Lab Duration Units Enter the unit of measure that defines the number of credits or units a full-time student requires to complete the laboratory or shop training included in the course.

Course OJT Duration Units (course on the job training duration units) Enter the unit of measure that defines the duration of on the job training activities that are a regular part of the course.

Defining Canadian Reporting Business Unit Career Usage Values

Access the Career Usage page.

Career Order No (career order number) Enter a career order number for the corresponding academic career. This number determines the order in which the system processes careers when it looks to report start and end dates on the Institution Description file. The Institution Description file is an ESIS report.

Academic Career Enter rows for all careers that you want to report.

Reviewing Delivered Report Types and Element Numbers

This section discusses how to review delivered codes.

Pages Used to Review Delivered Codes

Page Name	Object Name	Navigation	Usage
Report Type	CAN_RPT_TYPE	Government Reporting, Government Reporting Canada, Setup Def, Define Report Type, Report Type	All (Delivered by PeopleSoft): Review report type values.
Government Element	CAN_GOV_ELEMENT	Government Reporting, Government Reporting Canada, Setup Def, Define Govt Element, Government Element	All (Delivered by PeopleSoft): Review government element values.

Reviewing Delivered Government Report Types

Access the Report Type page.

Description The report type description.

Short Description The report type short description.

Reviewing Delivered Government Elements

Access the Government Element page.

Element Number The element number specified in the government documentation.

Element Default The element default value specified in the government documentation.

Defining Element Classifications

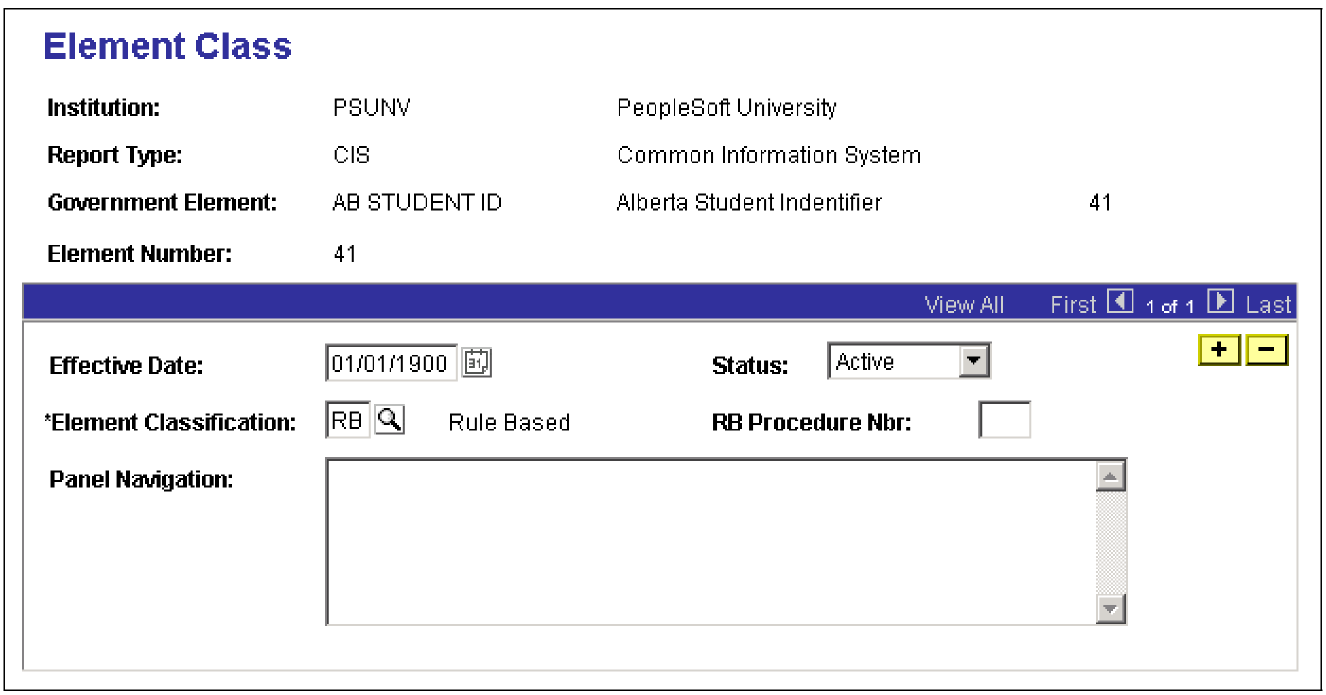
This section discusses how to define element classifications.

Page Used to Define Element Classification Types

Page Name	Object Name	Navigation	Usage
Element Class	CAN_RPT_ELEM_CLASS	Government Reporting, Government Reporting Canada, Setup Def, Define Element Class, Element Class	All (Delivered by PeopleSoft for PSUNV): Define element classification types for your institution. Copy the values delivered by PeopleSoft.

Defining Element Classification Types

Access the Element Class page.



Element Class page

Element Classification Copying the values delivered by PeopleSoft for *PSUNV,* enter the reporting classification for the element. Your choices are CM (classification mapping), DM (direct mapping), MM (master mapping), RB (rules based), and SM (separate mapping).

RB Procedure Nbr (rules based procedure number) — Copying the values delivered by PeopleSoft for *PSUNV,* for rules based elements only, enter a procedure number. This number defines the procedure number that the extract program executes. You cannot create duplicate procedure numbers within a report type. MET procedure numbers *must* be numbered in the 200 series. Changes and additions to the values delivered for PSUNV will require customization.

Panel Navigation — Enter the panel navigation to define the location where users enter the data. This field is informational only and has no programming tied to it.

Defining Report Periods

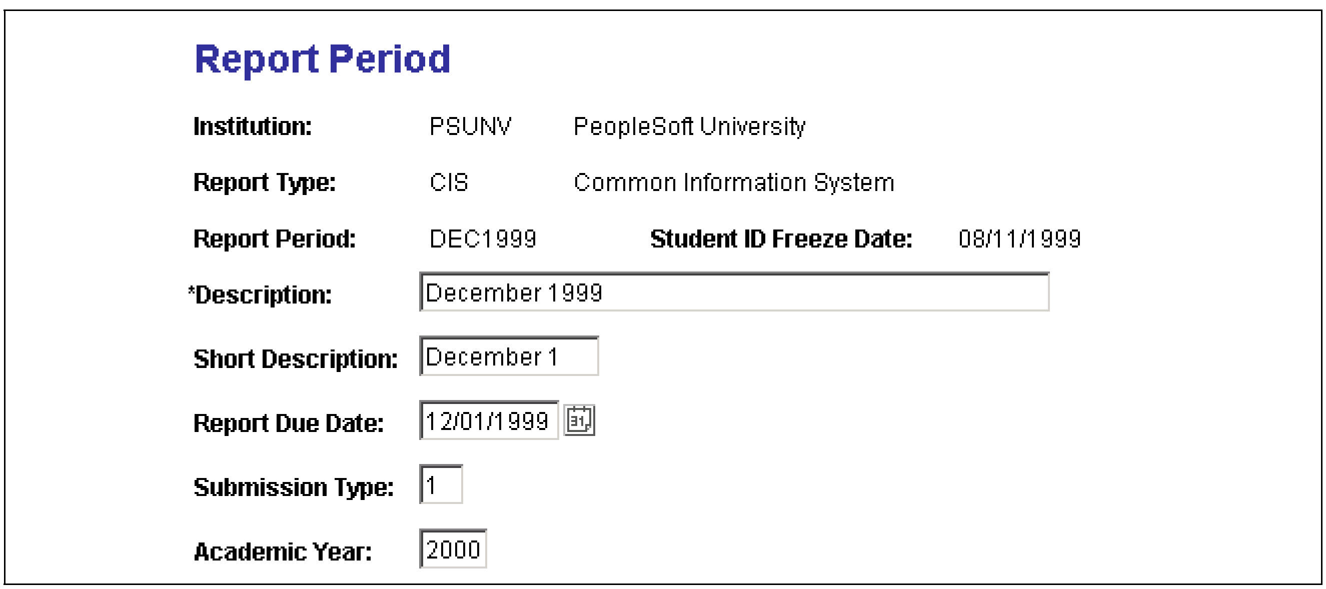
This section discusses how to define report periods.

Page Used to Define Report Periods

Page Name	Object Name	Navigation	Usage
Report Period	CAN_RPT_PERIOD	Government Reporting, Government Reporting Canada, Setup Def, Define Report Period, Report Period	All: Define reporting periods.

Defining Report Periods

Access the Report Period page.



Report Period page

Institution — Enter the institution for which you will run the report.

Report Type — Enter the report type to which the reporting period pertains.

Report Period	Enter a unique reporting submission period for your report type.
Report Due Date	Enter the date upon which you must report data. The system uses this date to perform effective date checking. This enables you to process data after the report date, and as long as the changes have an effective date, the system does not pick them up for reporting. If you need to make corrections to reporting data, you must ensure that the data has an effective date that is less than or equal to this report due date.
Student ID Freeze Date	The date that the student list, for the selected reporting period, is frozen.

The following fields are available for entry if you specify a report type of *ESIS.*

ESIS Report Type	Enter the type of report to be run.
ESIS Start Year	Enter the year in which the current reporting period begins.
ESIS Period Start	Enter the start date of the reporting period.
ESIS Period End	Enter the end date of the report period.

The following fields are available for entry if you specify a report type of *USISE.*

REPDAY (report day)	Enter a value for the report date.

The following fields are available for entry if you specify a report type of *CIS.*

Submission Type	Enter the reporting submission type.
Academic Year	Enter the academic year for the reporting type.

The following fields are available for entry if you specify a report type of *MET.*

REPDAY (report day)	Enter a value for the report date.
Term Enroll Prd (term enrollment period)	Select Fall to report the QUALIF value mapped from the plan mapping table or the program mapping table. If you select Winter, Spring, or Summer, the system reports the FIN_QUALIF value.

Note. For Ontario schools that report OUAC elements in the Fall, ensure that the Fall reporting period that you set up for MET reporting is *identical* to the reporting period for OUAC. If the reporting period for MET and OUAC differ, the flat file process cannot combine the reporting files.

Reviewing Delivered Government Element Codes

This section discusses how to review delivered government element codes.

Pages Used to Review Delivered Government Element Codes

Page Name	Object Name	Navigation	Usage
Forpos Code (formula program of study code)	CAN_RPT_FORPOS	Government Reporting, Government Reporting Canada, Setup Def, Define Forpos Code, Forpos Code	USISE, MET: Review delivered FORPOS codes.
Quacod Code (coded title of qualification code)	CAN_RPT_QUACOD	Government Reporting, Government Reporting Canada, Setup Def, Define Quacod Code, Quacod Code	USISE, MET: Review delivered QUACOD codes.
Qualif Code (qualification code)	CAN_RPT_QUALIF	Government Reporting, Government Reporting Canada, Setup Def, Define Qualif Code, Qualif Code	USISE, MET: Review delivered QUALIF codes.
Seshun Code (session code)	CAN_RPT_SESHUN	Government Reporting, Government Reporting Canada, Setup Def, Define Seshun Code, Seshun Code	USISE, MET: Review delivered SESHUN codes.
Spemaj Code (specialization of major field of study code)	CAN_RPT_SPEMAJ	Government Reporting, Government Reporting Canada, Setup Def, Define Spemaj Code, Spemaj Code	USISE, MET: Review delivered SPEMAJ codes.

Reviewing Delivered County and Country Codes

This section discusses how to review delivered county and country codes.

Pages Used to Review County and Country Codes

Page Name	Object Name	Navigation	Usage
County Code	CAN_GOV_COUNTY	Government Reporting, Government Reporting Canada, Setup Def, Define County Codes, County Code	ESIS, USISE, MET: Review delivered county codes.
Country Code	CAN_GOV_COUNTRY	Government Reporting, Government Reporting Canada, Setup Def, Define Country Codes, Country Code	ESIS, USISE, MET: Review delivered country codes.

Reviewing Delivered Language, School, and CIS Language Codes

This section discusses how to review delivered language, school, and CIS language codes.

Pages Used to Review Delivered Language, School, and CIS Language Codes

Page Name	Object Name	Navigation	Usage
Language Code	CAN_GOV_LANG	Government Reporting, Government Reporting Canada, Setup Def, Define Language Codes, Language Code	ESIS, USISE, MET: Review delivered language codes.
School Code	CAN_GOV_SCHOOL	Government Reporting, Government Reporting Canada, Setup Def, Define School Codes, School Code	ESIS, CIS: Review delivered school codes.
CIS Language Code	CAN_CIS_LANGUAGE	Government Reporting, Government Reporting Canada, Setup Def, Define CIS Language Code, CIS Language Code	CIS: Review delivered CIS language codes.

Defining Provincial Codes

This section discusses how to define provincial codes.

Pages Used to Define Provincial Codes

Page Name	Object Name	Navigation	Usage
Prov Approval Code (provincial approval code)	CAN_PROV_APPR_TBL	Government Reporting, Government Reporting Canada, Setup Def, Prov Approval Codes, Prov Approval Code	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The Program and Plan Mapping tables prompt against the approval codes you define.
Prov Course Fund Code (provincial course funding code)	CAN_PROV_FNDCRS	Government Reporting, Government Reporting Canada, Setup Def, Prov Course Funding Codes, Prov Course Fund Code	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The Cdn ESIS Course Data table prompts against the course funding codes you define.
Prov Citizenship Fund Class (provincial citizenship funding classification)	CAN_PROV_CITZ	Government Reporting, Government Reporting Canada, Setup Def, Prov Funding by Citizen, Prov Citizenship Fund Class	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The ESIS Student Data table prompts against the classification funding codes you define.
Prov Major Code (provincial major code)	CAN_PROV_MAJOR	Government Reporting, Government Reporting Canada, Setup Def, Prov Major Field of Study, Prov Major Code	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the major codes you define.
Prov Program Code (provincial program code)	CAN_PROV_PROG	Government Reporting, Government Reporting Canada, Setup Def, Prov Program Codes, Prov Program Code	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the program codes you define.
Prov Prog Funding Code (provincial program funding code)	CAN_PROV_FUND	Government Reporting, Government Reporting Canada, Setup Def, Prov Prog Funding Codes, Prov Prog Funding Code	ESIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the province program funding code.

Defining Program Funding Approval Codes

Access the Prov Approval Code page.

Province The system populates the province field to the value defined for your business unit.

Approval Code	Enter the provincial code that defines whether the student is approved for funding in the program.
Description and **Short Description**	Enter the descriptions for the code.

Defining Provincial Course Funding Codes

Access the Prov Course Fund page.

Province	The system populates the province field by default to the value defined for your business unit.
Crse Fund Cd (course funding code)	Enter the provincial code that defines the course funding code.

Defining Provincial Citizen Funding Codes

Access the Prov Citizenship Fund Class page.

Province	The system populates the province field by default to the value defined for your business unit.
Funding Class by Citz (funding classification by citizen)	Enter the provincial code that classifies the student for grant purposes.

Defining Provincial Major Field of Study Codes

Access the Prov Major Code page.

Province	The system populates the province field by default to the value defined for your business unit.
Prov Major (province major)	Enter the provincial code that classifies students' major field of study.

Defining Provincial Program Codes

Access the Prov Program Code page.

Province	The system populates the province field by default to the value defined for your business unit.
Prog Category (program category)	Enter the provincial code that defines the program category.

Defining Provincial Program Funding Codes

Access the Prov Program Funding Code page.

Province	The system populates the province field by default to the value defined for your business unit.
Prov Fund Cd (province funding code)	Enter the provincial code that classifies whether the student has been approved for funding in the program.

Defining Provincial Special Initiative Codes

Access the Prov Special Initiative Code page.

Province	The system populates the province field by default to the value defined for your business unit.
Special Init Cd (special initiative code page)	Enter the provincial special initiative code that associates with students in the program.

Defining General Mapping Tables

This section discusses how to define general mapping tables.

Pages Used to Define General Mapping Tables

Page Name	Object Name	Navigation	Usage
Language Mapping	CAN_RPT_TONGUE	Government Reporting, Government Reporting Canada, Setup Map, Language Mapping, Language Mapping	CIS, ESIS, MET, USISE: Map language codes.
Province Mapping	CAN_RPT_PROV	Government Reporting, Government Reporting Canada, Setup Map, Province Mapping, Province Mapping	CIS, MET, USISE: Review PeopleSoft delivered province codes.
Reporting Sequence Mapping	CAN_RPT_SEQ	Government Reporting, Government Reporting Canada, Setup Map, Reporting Sequence Mapping, Reporting Sequence Mapping	USISE (Optional): Define a record and reporting sequence for the USISE report type. Populate this page to limit your USIS Enrollment file to only one record per student from the CAN_STDNT_LST table.
Term Group Mapping	CAN_RPT_TERM_GRP	Government Reporting, Government Reporting Canada, Setup Map, Term Group Mapping, Term Group Mapping	ALL: For each report type, report period, and career, map the applicable terms and sessions that you want to report.
OUAC Applno Mapping (OUAC application number mapping)	CAN_RPT_APPLNO	Government Reporting, Government Reporting Canada, Setup Map, OUAC Applno Mapping, OUAC Applno Mapping	OUAC: Review delivered OUAC application numbers.
Classification Mapping	CAN_RPT_CM	Government Reporting, Government Reporting Canada, Setup Map, Classification Mapping Table, Classification Mapping	ESIS: Define classification mapping values.
Direct Mapping	CAN_RPT_DM	Government Reporting, Canada, Setup Map, Direct Mapping Table, Direct Mapping	CIS, ESIS, USISE: Define direct mapping values.
Master Mapping	CAN_RPT_MM	Government Reporting, Government Reporting Canada, Setup Map, Master Mapping Table, Master Mapping	CIS, ESIS, USISE, OUAC: Define master mapping values.
Separate Mapping	CAN_RPT_SM	Government Reporting, Government Reporting Canada, Setup Map, Separate Mapping Table, Separate Mapping	CIS, ESIS, OUAC, USISE: Define separate mapping values.

Mapping Language Codes

Access the Language Mapping page.

Language Code	Enter the PeopleSoft language code that you want to map.
CIS Tongue	Enter the corresponding CIS value for the language code. Map this field if your institution performs CIS reporting. This field prompts against the CAN_CIS_LANG record.
Tongue	Enter the corresponding USISE value for the language code. Map this field if your institution performs USISE or MET reporting.
ESIS Language	Enter the corresponding ESIS value for the language code. Map this field if your institution performs ESIS reporting. This field prompts against the CAN_GOV_LANG record.

Reviewing Delivered Province Codes

Access the Province Mapping page.

Province	The PeopleSoft province value that you want to map.
Province Number	The province code as defined by Statistics Canada.

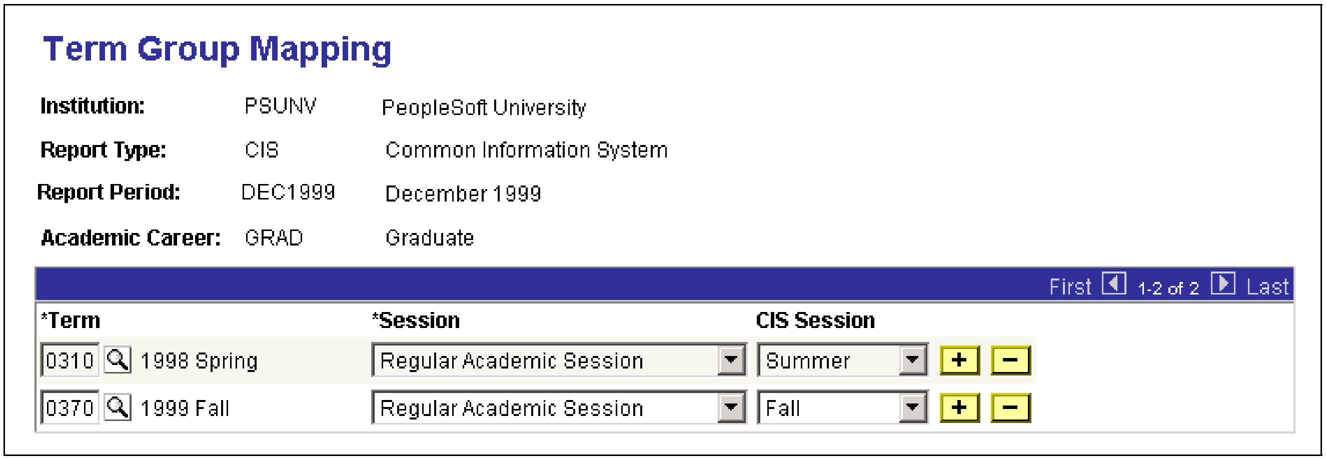
Mapping Canadian Reporting Sequence

Access the Reporting Sequence Mapping page.

Record	Enter the PeopleSoft record name that determines reporting sequence (for this report type). For example, *STDNT_CAR_TERM.*
Field Name	Enter the PeopleSoft field name that determines reporting sequence (for this report type). For example, *ACAD_CAREER.*
Reporting Sequence	Enter the sequence or priority number that relates to the PeopleSoft value for the field you specify. At run time, you specify which value that you want the system to select for processing in the event that the selection process finds multiple records for a student.) For example, *05.*
PeopleSoft Value	Enter the PeopleSoft codes for the field name you specify. For example, *GRAD.*

Mapping Terms and Sessions to Reporting Periods

Access the Term Group Mapping page.



Term Group Mapping page

Institution Enter the reporting institution.

Report Type Enter the report you want to map.

Report Period Enter a reporting period for the report type.

Academic Career Enter the academic career that you want to include for the reporting period.

Term Enter the institution term for the career and report period.

Session Enter the institution session for the term and report period.

The following fields are available for entry if you specify a report type of *CIS.*

CIS Session Enter the appropriate CIS session value for the term and session you specify.

The following fields are available for entry if you specify a report type of *ESIS.*

Report Type Select the report in which you want to include the term and session data. Your choices are:

Prelim Report (preliminary report): Select to include the term and session data in the Preliminary Report and the Final Report.

Final Report: Select to include the term and session data in the Final Report only.

Withdrawal Date Enter the last date in the term and session that a student can withdraw from a course without academic penalty.

The following fields are available for entry if you specify a report type of *USISE, or MET.*

Seshun Value (session value) Enter the appropriate USIS Enrolment Seshun value for the term and session specified.

Reviewing Delivered OUAC Application Numbers

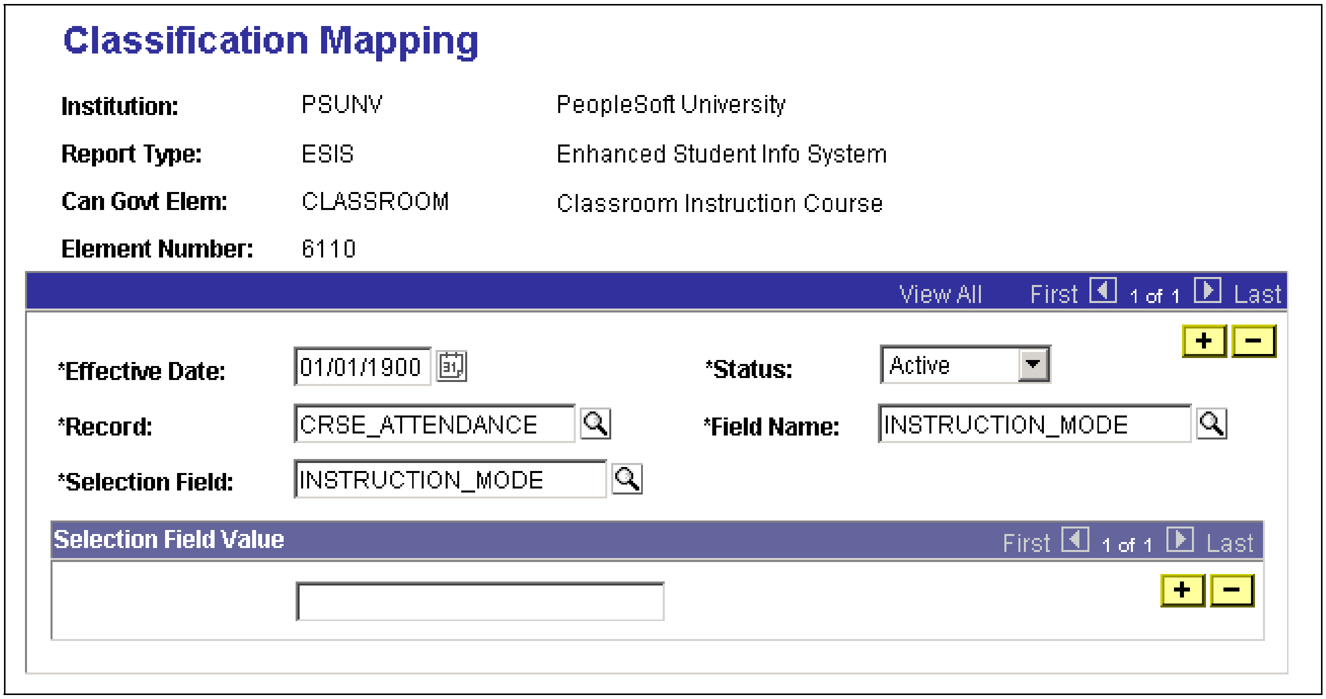
Access the OUAC Applno page.

OUAC Appl Nbr (OUAC application number) — Enter the two-digit OUAC application number (APPLNO).

OUAC APPLN (OUAC application number) — Enter the converted one digit application number (CNVAPL).

Defining the Classification Mapping Table

Access the Classification Mapping page.



Classification Mapping page

Record, Field Name, and Selection Field values are delivered and defined for all applicable elements for 'PSUNV.' Set up the same values for your institution if you perform ESIS reporting.

Record — Enter the PeopleSoft record name that the system uses to report the specified element.

Field Name — Enter the PeopleSoft field name that the system uses to report the specified element. The system prompt table displays all valid fields for the record, but does not edit your input against the list. This enables you to enter a field name that is in a sub-record.

Selection Field — Enter the PeopleSoft selection field that applies to the element. This field must be on the record you specify. This field may be the same as or different from the Field Name value.

Selection Field Value — Enter the PeopleSoft selection field values that relate to the selection field that you want to report. You can enter more than one value.

Defining the Direct Mapping Table

Access the Direct Mapping page.

Record, Field Name, and Selection Field values are delivered and defined for all applicable elements for 'PSUNV.' Set up the same values for your institution if you perform ESIS reporting.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.
Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a sub-record.

Defining the Master Mapping Table

Access the Master Mapping page.

Record, Field Name, and Selection Field values are delivered and defined for all applicable elements for 'PSUNV.' Set up the same values for the report types that are applicable to your institution.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.
Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a sub-record.
PeopleSoft Value	Enter the delivered or user-defined values for the field name.
Government Value	Enter the government code that corresponds to the PeopleSoft value.

Defining the Separate Mapping Table

Access the Separate Mapping page.

Record, Field Name, and Selection Field values are delivered and defined for all applicable elements for 'PSUNV'. Set up the same values for the report types that are applicable to your institution.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.
Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a sub-record.
Gov't Record (government record)	Enter the PeopleSoft record that houses the translate codes.
Gov't Field Name (government field name)	Enter the PeopleSoft field that contains the government codes that correspond to the values in the field name.

Defining School Reporting Classifications

This section discusses how to define school reporting classifications.

Page Used to Define School Reporting Classifications

Page Name	Object Name	Navigation	Usage
School Type Table	SCHOOL_TYPE_TABLE	Design Student Administration, Design Admissions, Setup, School Type Table, School Type Table	CIS, ESIS, MET, USISE: Define school reporting classifications.

Defining School Reporting Classifications

Access the School Type Table page.

See *PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook*, “Setting Up Prospects,” Setting Up School Types.

Defining Address and Phone Usage Values for Canadian Government Reporting

This section discusses how to:

- Create an address usage for ESIS ‘Current’ address reporting.
- Create an address usage for ESIS ‘Current’ email address reporting.
- Create a phone usage for ESIS ‘Current’ phone reporting.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Designing PeopleSoft Campus Community,” Establishing Address Usages

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Designing PeopleSoft Campus Community,” Establishing Phone Usages

Pages Used to Define Address and Phone Usage Table Entries for Canadian Government Reporting

Page Name	Object Name	Navigation	Usage
Address Usage	ADDR_USAGE_TABLE	Design Student Administration, Establish People Processing, Setup, Address Usage Table, Address Usage	ESIS: Define Canadian reporting address usage values.
Phone Usage	PHONE_USAGE_TABLE	Design Student Administration, Establish People Processing, Setup, Phone Usage Table, Phone Usage	ESIS: Define Canadian reporting phone usage values.

Defining Address Usage Values

Access the Address Usage page.

To create an address usage for ESIS 'Current' address reporting:

1. Access the Address Usage Table page.
2. Add an Address Usage of *RPT_ADDR.*.
3. In the Description field, enter *Address Priority for Cdn Rpts.*
4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Ordr, Usage Type, and Address Type fields, insert rows for all of your address types.

Defining Email Address Usage Values

Access the Address Usage page.

To create an address usage for ESIS 'Current' email address reporting:

1. Access the Address Usage Table page.
2. Add an Address Usage of *RPT_EMAIL.*
3. In the Description field, enter *E-mail Priority for Cdn Rpts.*
4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Ordr, Usage Type, and Address Type fields, insert rows for all of your email address types.

Defining Phone Usage Values

Access the Phone Usage page.

To create a phone usage for ESIS 'Current' phone reporting:

1. Access the Phone Usage page.
2. Add a Phone Usage of *RPT_PHONE.*
3. In the Description field, enter *Phone Priority for Cdn Rpts.*

4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Order and Phone Type fields, insert rows for all of your phone usage types.

Mapping Program Values for ESIS, USISE, MET, and OUAC

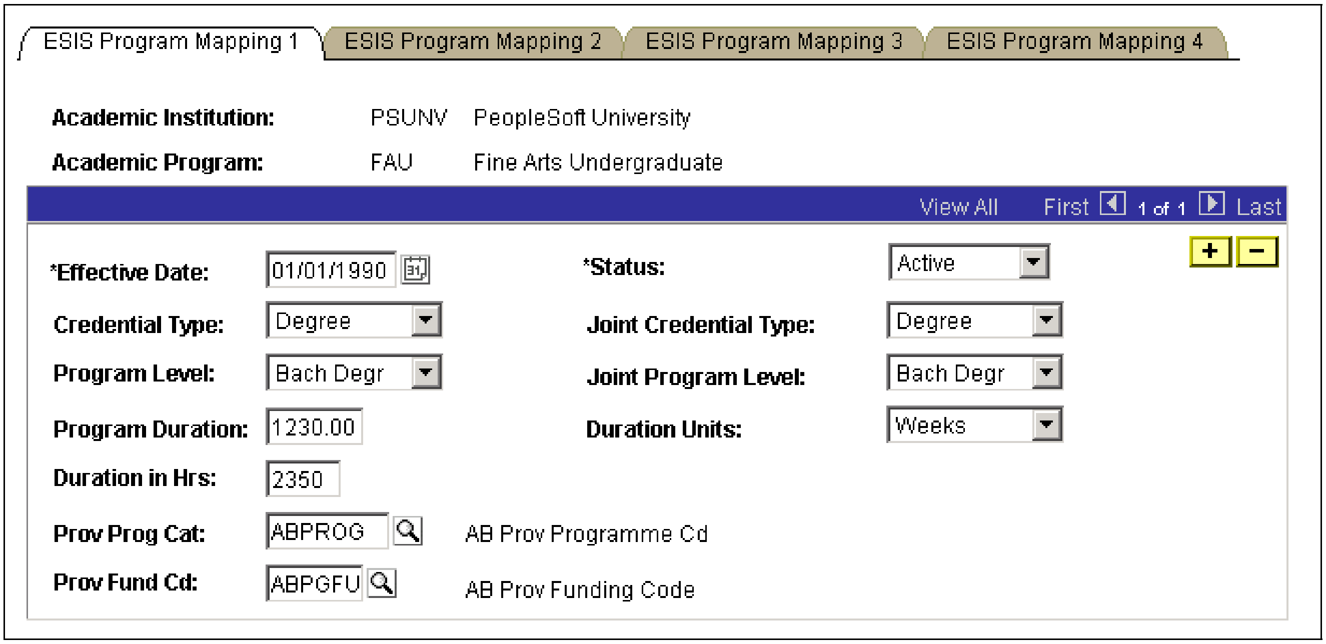
This section discusses how to define ESIS, USISE, MET, and OUAC program mapping values.

Pages Used to Define ESIS, USISE, MET, and OUAC Program Mapping Values

Page Name	Object Name	Navigation	Usage
ESIS Program Mapping 1	CAN_RPT_PROG3	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Program Table, ESIS Program Mapping 1	ESIS: Define ESIS program mapping values.
ESIS Program Mapping 2	CAN_RPT_PROG4	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Program Table, ESIS Program Mapping 2	ESIS: Define additional ESIS program mapping values.
ESIS Program Mapping 3	CAN_RPT_PROG5	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Program Table, ESIS Program Mapping 3	ESIS: Define additional ESIS program mapping values.
ESIS Program Mapping 4	CAN_RPT_PROG6	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Program Table, ESIS Program Mapping 4	ESIS: Define additional ESIS program mapping values.
USISE Program Mapping	CAN_RPT_PROG	Government Reporting, Government Reporting Canada, Setup Acad, Cdn Academic Program Table, USISE Program Mapping	USISE: Define USISE program mapping values.
MET/OUAC Program Mapping	CAN_RPT_PROG2	Government Reporting, Government Reporting Canada, Setup Acad, Cdn Academic Program Table, MET/OUAC Program Mapping	MET, OUAC: Define MET and OUAC program mapping values.

Defining ESIS Program Mapping 1 Values

Access the ESIS Program Mapping 1 page.

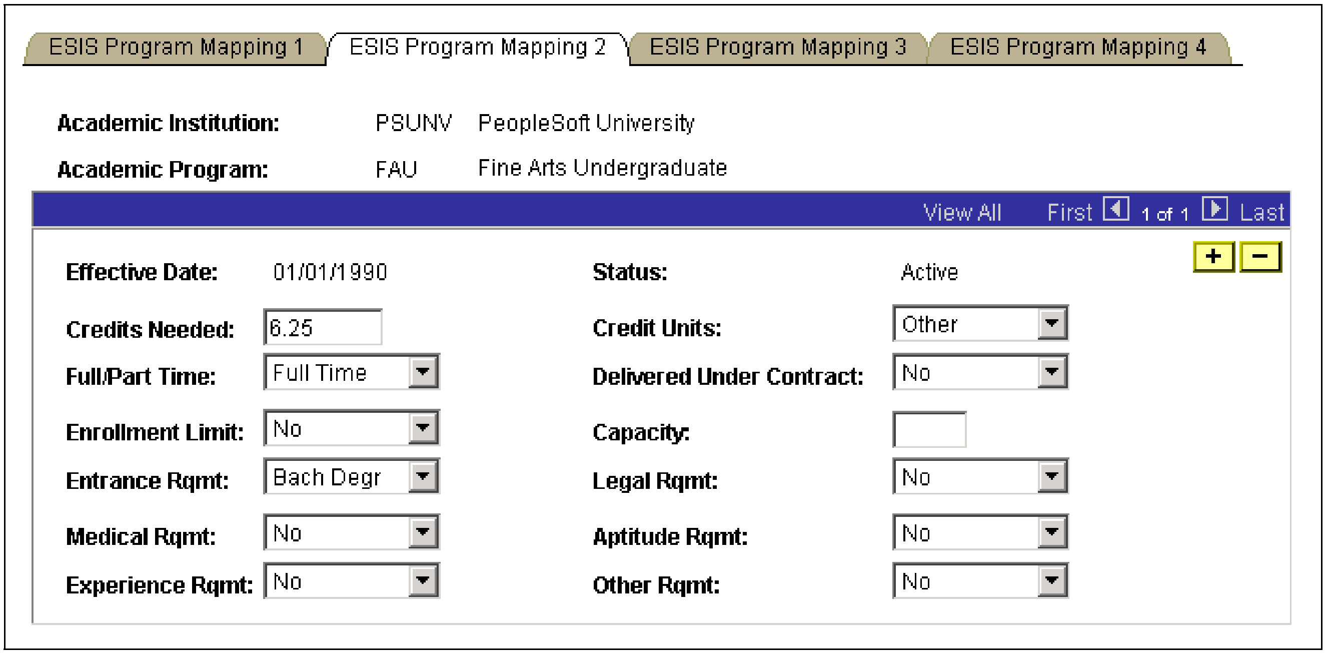


ESIS Program Mapping 1 page

Credential Type	Enter the type of credential awarded to students for successful completion of the program.
Joint Credential Type	Enter the joint or second credential for joint program in which a student typically receives two credentials.
Program Level	Enter the level category of the program.
Joint Program Level	Enter the level category of the joint credential awarded to students for successful completion of the program.
Prog Duration (program duration)	Enter the normal time to complete the program for a full-time student who takes courses through traditional delivery.
Duration Units	Enter the unit of measure for the program duration. The system populates this field by default from the Business Unit Table page.
Duration in Hrs (duration in hours)	Enter the sum of the hours of instruction to complete the program for a full-time student who takes courses through traditional delivery.
Prov Prog Cat (province program category)	Enter the program category as defined by the Provincial Ministry. This field prompts against the CAN_PROV_PROG record.
Prov Fund Cd (province funding code)	Enter the provincial funding code as defined by the Provincial Ministry. This field prompts against the CAN_PROV_FUND record.

Defining ESIS Program Mapping 2 Values

Access the ESIS Program Mapping 2 page.



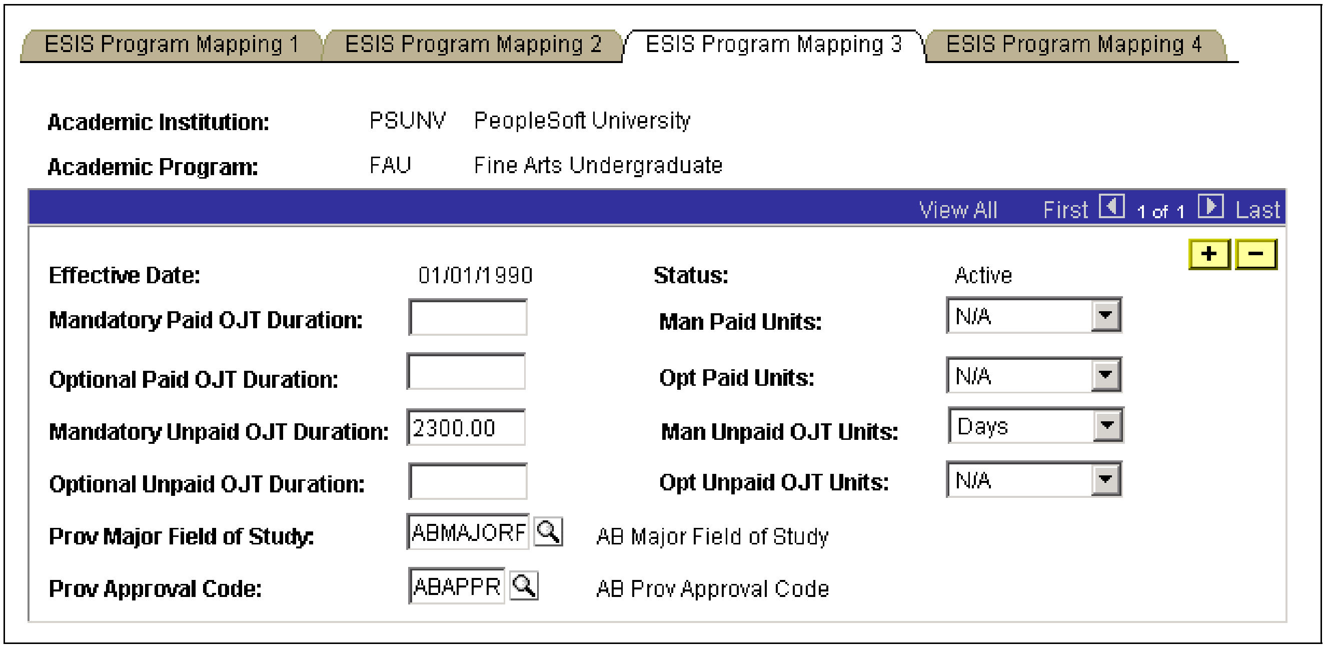
ESIS Program Mapping 2 page

Credits Needed	Enter the number of credits or units of academic achievement required to complete the program.
Credit Units	Enter the type of units used in the Credits Needed field. The system populates this field by default from the Business Unit Table.
Full/Part Time	Indicate the way in which the program is offered.
Delivered Under Contract	Indicate whether the program is delivered under contract by the institution to an outside party. Your choices are *N/A, No, Unknown,* and *Yes.*
Enrollment Limit	Indicate whether the program is limited, either by an internally or externally imposed quota. Your choices are *Govt Limit, Instit Lim, N/A, No, Prof Org,* and *Unknown.*
Capacity	If the program has limited enrollment, enter the maximum number of new students that can be admitted to the program during a report period.
Entrance Rqmt (entrance requirement)	Enter the educational entrance requirements to begin the program.
Legal Reqmt (legal requirement)	Indicate whether any legal requirements exist for the program. You choices are *N/A, No, Unknown,* and *Yes.*
Medical Rqmt (medical requirement)	Indicate whether any medical or psychological entrance requirements exist for the program. Your choices are *N/A, No, Unknown,* and *Yes.*
Aptitude Rqmt (aptitude requirement)	Indicate whether successful completion of an aptitude and proficiency test (or interview) is an entrance requirement for the program. Your choices are *N/A, No, Unknown,* and *Yes.*
Experience Rqmt (experience requirement)	Indicate whether previous related experience is an entrance requirement for the program. Your choices are *N/A, No, Unknown,* and *Yes.*

Other Rqmt (other requirement)
Indicate whether any other entrance requirements are required for entry into the program. Your choices are *N/A, No, Unknown,* and *Yes.*

Defining ESIS Program Mapping 3 Values

Access the ESIS Program Mapping 3 page.


ESIS Program Mapping 1 | ESIS Program Mapping 2 | ESIS Program Mapping 3 | ESIS Program Mapping 4

Academic Institution: PSUNV PeopleSoft University
Academic Program: FAU Fine Arts Undergraduate

View All First 1 of 1 Last

Effective Date: 01/01/1990 Status: Active
Mandatory Paid OJT Duration: Man Paid Units: N/A
Optional Paid OJT Duration: Opt Paid Units: N/A
Mandatory Unpaid OJT Duration: 2300.00 Man Unpaid OJT Units: Days
Optional Unpaid OJT Duration: Opt Unpaid OJT Units: N/A
Prov Major Field of Study: ABMAJORF AB Major Field of Study
Prov Approval Code: ABAPPR AB Prov Approval Code

ESIS Program Mapping 3 page

Mandatory Paid OJT Duration (mandatory paid on the job training duration)
Enter the duration of mandatory paid on the job training (OJT) activities that are a regular part of the program.

Man Paid Units (mandatory paid units)
Enter the unit type for the Man Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Optional Paid OJT Duration (optional paid on the job training duration)
Enter the duration of optional paid on the job training activities that are a regular part of the program.

Opt Paid Units (optional paid units)
Enter the unit type for the Optional Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Mandatory Unpaid OJT Duration (mandatory unpaid on the job training duration)
Enter the duration of mandatory unpaid on the job training activities that are a regular part of the program.

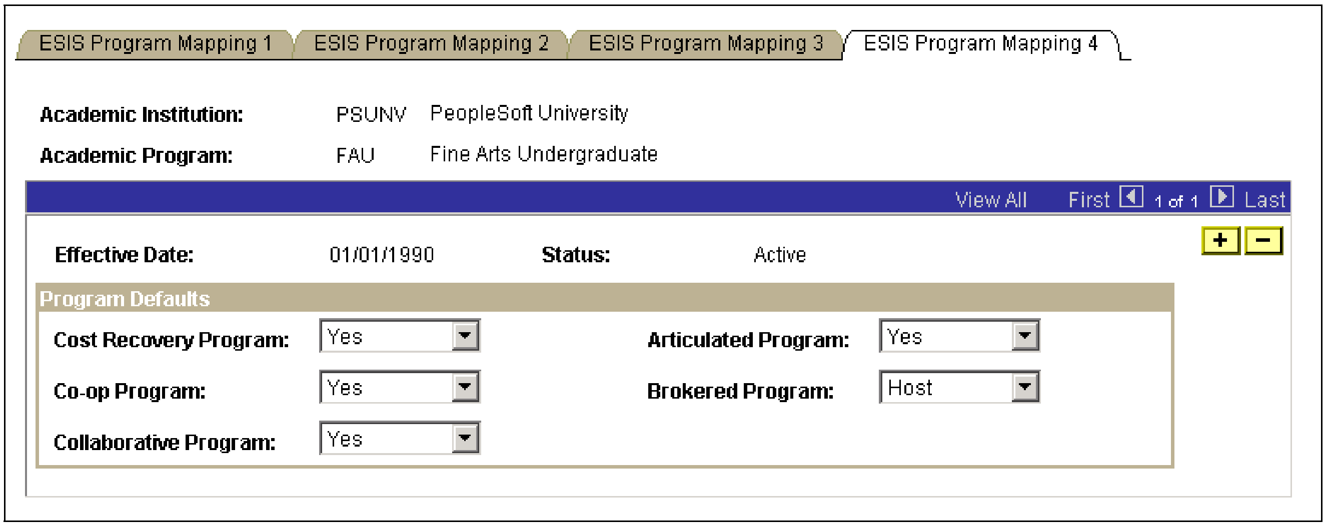
Man Unpaid OJT Units (mandatory unpaid on the job training units)
Enter the unit type for the Mandatory Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Optional Unpaid OJT Duration (optional unpaid on the job training duration)
Enter the duration of optional unpaid on the job training activities that are a regular part of the program.

Opt Unpaid OJT Units (optional unpaid on the job training units)
Enter the unit type for the Optional Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Defining ESIS Program Mapping 4 Values

Access the ESIS Program Mapping 4 page.



ESIS Program Mapping 4 page

Cost Recovery Program
Indicate whether the program is a cost recovery program.

Articulated Program
Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulation agreement.

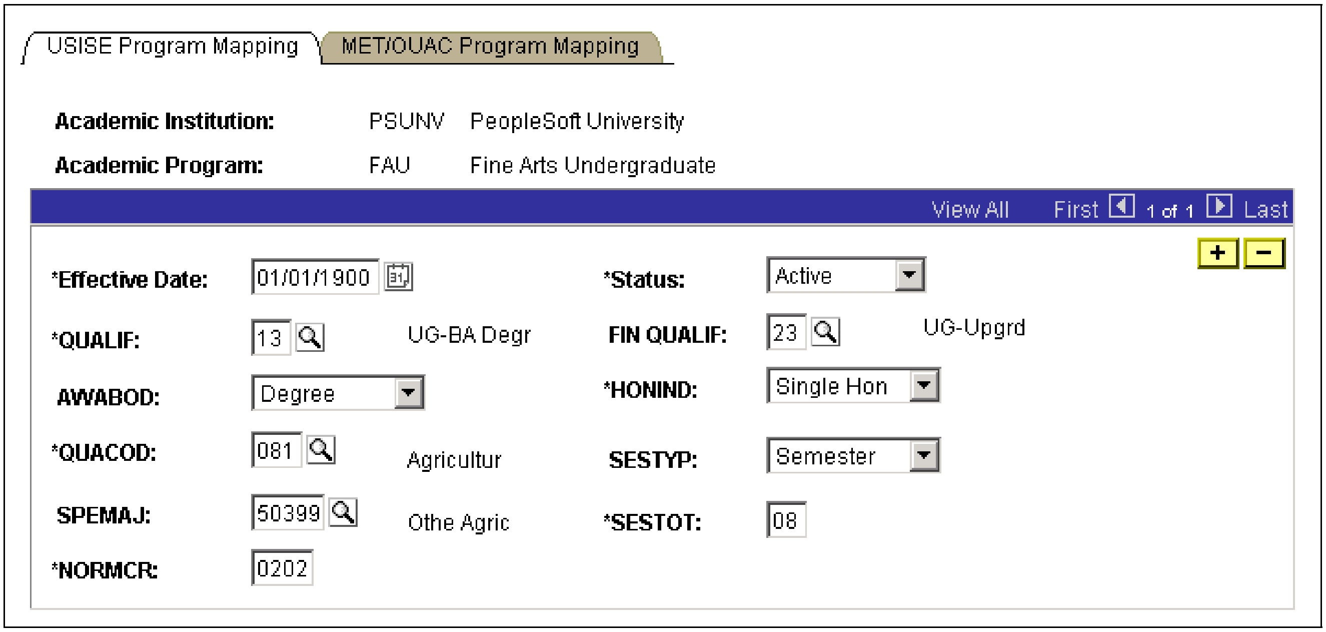
Co-op Program
Indicate whether this is a co-op program.

Brokered Program
Indicate whether this is a brokered program.

Collaborative Program
Indicate whether the program is offered under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers part of the program.

Defining USISE Program Mapping Values

Access the USISE Program Mapping page.



USISE Program Mapping page

QUALIF Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. The system reports this value in the Fall submission.

FIN QUALIF Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. FIN QUALIF values are reported in all submissions excluding the one in the Fall.

AWABOD Enter the government code that represents the body awarding the diploma or certificate.

HONIND Enter the government code that represents the honors program indicator.

QUACOD Enter the government code for coded title of qualification. This field prompts against the Can Report QUACOD table.

SESTYP Enter the government code that represents the type of session.

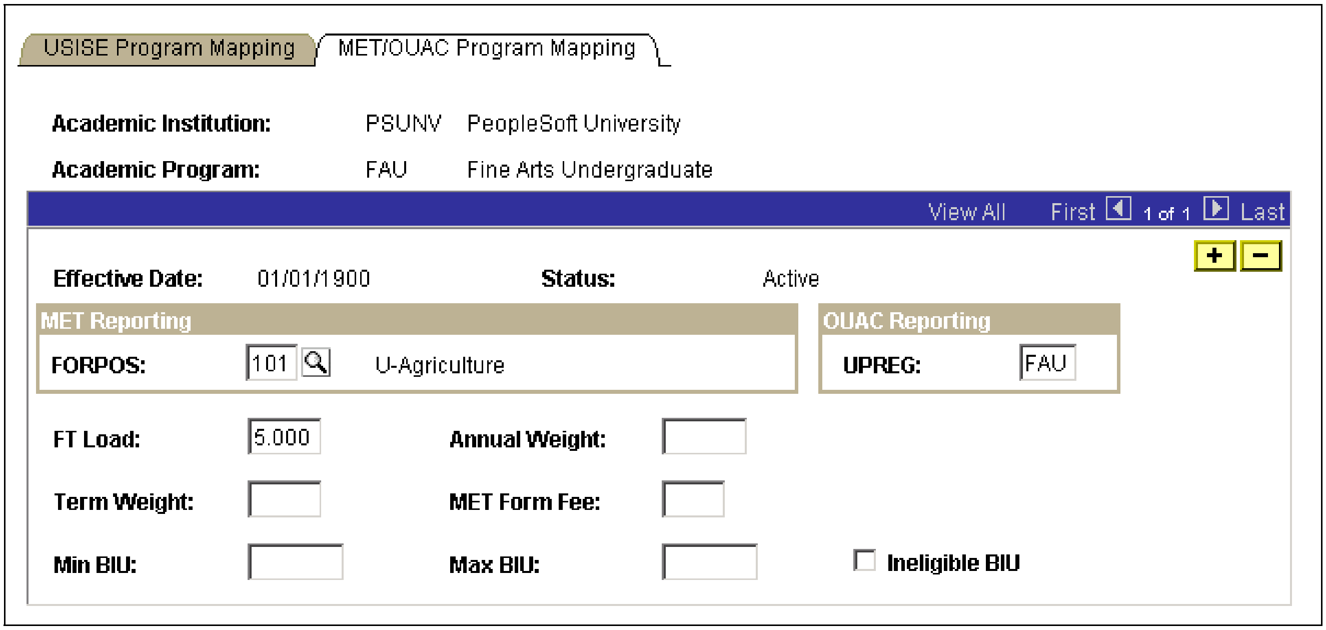
SPEMAJ Enter the government code for specialization or major field of study. This field prompts against the Can Report SPEMAJ table.

SESTOT Enter the government code that represents the total number of sessions required to compete the program.

NORMCR Enter the government code that represents the normal credit/course/unit requirements.

Defining MET and OUAC Program Mapping Values

Access the MET/OUAC Program Mapping page.



MET/OUAC Program Mapping page

FORPOS (formula program of study)	Enter the government code that represents the formula program of study.
UPREG (university and program registration)	Enter the government code that represent the university and program in which applicants register.
FT Load	Enter the full time load for an academic program and plan as the institution defines it.
Annual Weight	Established by MET and based on the FORPOS code. Weight varies for diploma and degree programs. Weights also differ from one institution to another for institution specific FORPOS codes.
Term Weight	Enter a value that the system uses when calculating the annual business income unit (BIU) for graduate levels.
MET Form Fee	Established by MET, based on the FORPOS code.
Min BIU (minimum business income unit)	Enter the minimum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.
Max BIU (maximum business income unit)	Enter the maximum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.
Ineligible BIU (ineligible business income unit)	Select this check box to indicate the academic program and plan is ineligible and the system should therefore not include it in the calculation of FTE (full time equivalency).

Mapping Plan Values for ESIS, USISE, MET, and OUAC

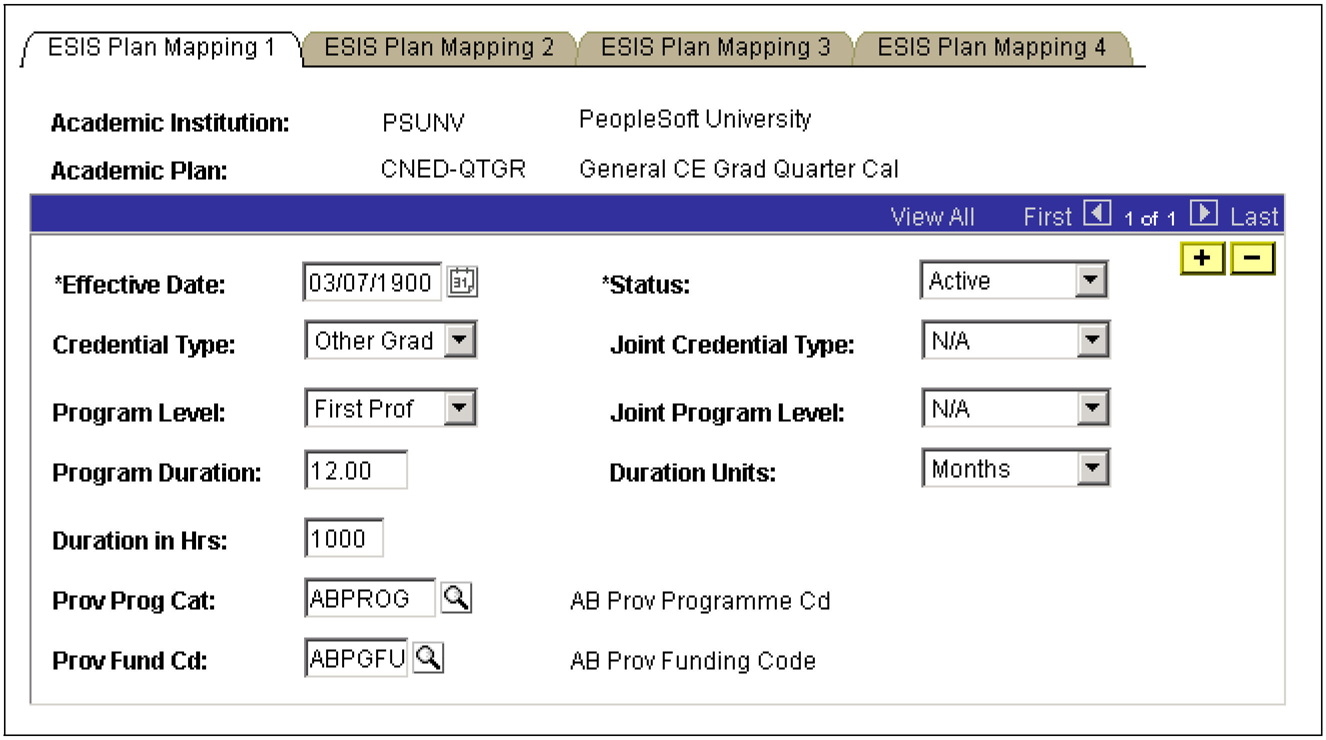
This section discusses how to map ESIS, USISE, MET, and OUAC plan values.

Pages Used to Map ESIS, USISE, MET, and OUAC Plan Values

Page Name	Object Name	Navigation	Usage
ESIS Plan Mapping 1	CAN_RPT_PLAN3	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Plan Table, ESIS Plan Mapping 1	ESIS: Define ESIS plan mapping values.
ESIS Plan Mapping 2	CAN_RPT_PLAN4	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Plan Table, ESIS Plan Mapping 2	ESIS: Define additional ESIS plan mapping values.
ESIS Plan Mapping 3	CAN_RPT_PLAN5	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Plan Table, ESIS Plan Mapping 3	ESIS: Define additional ESIS plan mapping values.
ESIS Plan Mapping 4	CAN_RPT_PLAN6	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Plan Table, ESIS Plan Mapping 4	ESIS: Define additional ESIS plan mapping values.
USISE Plan Mapping	CAN_RPT_PLAN	Government Reporting, Government Reporting Canada, Setup Acad, Cdn Academic Plan Table, USISE Plan Mapping	USISE: Define USISE plan mapping values.
MET/OUAC Plan Mapping	CAN_RPT_PLAN2	Government Reporting, Government Reporting Canada, Setup Acad, Cdn Academic Plan Table, MET/OUAC Plan Mapping	MET/OUAC: Define MET and OUAC plan mapping values.

Defining ESIS Plan Mapping 1 Values

Access the ESIS Plan Mapping 1 page.



ESIS Plan Mapping 1 page

Credential Type
Enter the type of credential the institution awards for successful completion of the program.

Joint Credential Type
Enter the joint or second credential for joint programs in which a student typically receives two credentials.

Program Level
Enter the level category of the program.

Joint Program Level
Enter the level category of the joint credential the institution awards for successful completion of the program.

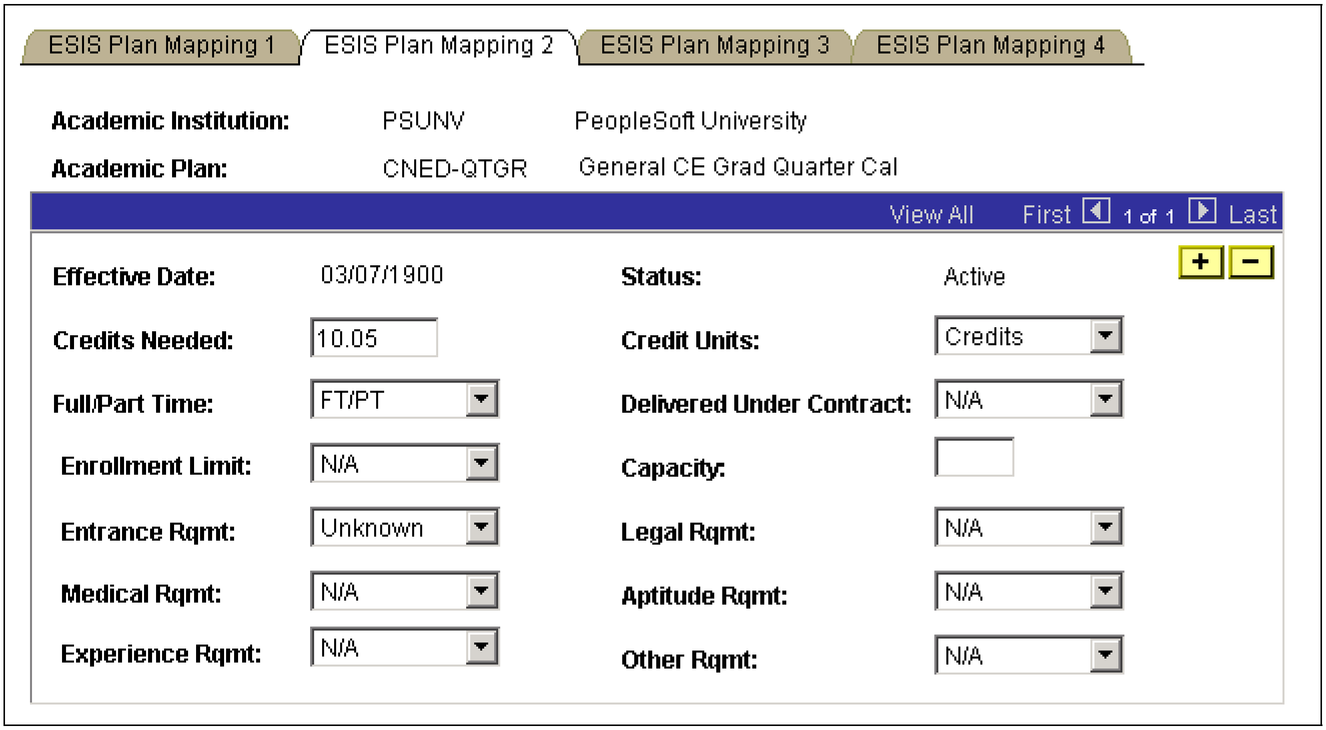
Program Duration
Enter the normal time to complete the entire program for a full-time student through traditional program delivery.

Duration Units
Enter the type of time unit you used to calculate program duration. Your choices are *Acad Years, Half - Semes, Months, NA, Semesters, Weeks,* and *Years.*

Duration in Hrs (duration in hours)
Enter the sum of the hours of instruction of courses normally required to complete the entire program through traditional delivery.

Defining ESIS Plan Mapping 2 Values

Access the ESIS Plan Mapping 2 page.



ESIS Plan Mapping 2 page

Credits Needed	Enter the number of credits or units of academic achievement required to complete the program.
Credit Units	Enter the type of units used in the Credits Needed field. The system populates this field by default from the Business Unit Table.
Full/Part Time	Indicate whether the program is offered on a full-time basis *(FT),* part-time basis *(PT),* or at the student's option *(FT/PT).*
Delivered Under Contract	Indicate whether the program is delivered under contract by the institution to an outside party. Your choices are *N/A, No, Unknown,* and *Yes.*
Enrollment Limit	Indicate whether the program is limited, either by an internally or externally imposed quota. Your choices are *Govt Limit, Instit Lim, N/A, No, Prof Org,* and *Unknown.*
Capacity	If the program has limited enrollment, enter the maximum number of new students that can be admitted to the program during a report period.
Entrance Rqmt (entrance requirement)	Enter the educational entrance requirements to begin the program. Your choices are *N/A, No, Unknown,* and *Yes.*
Legal Rqmt (legal requirement)	Indicate whether any legal requirements exist for the program. Your choices are *N/A, No, Unknown,* and *Yes.*
Medical Rqmt (medical requirement)	Indicate whether any medical or psychological entrance requirements exist for the program. Your choices are *N/A, No, Unknown,* and *Yes.*

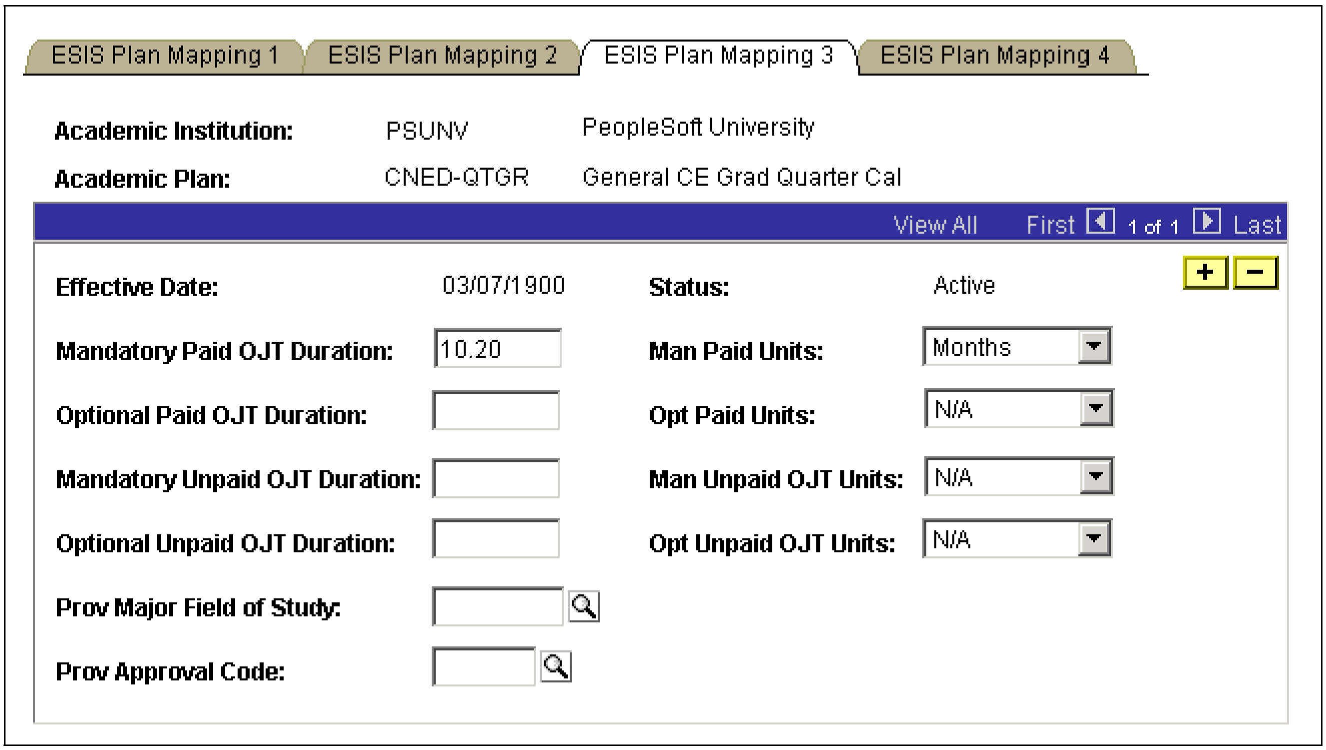
Aptitude Rqmt (aptitude requirement)
Indicate whether successful completion of an aptitude and proficiency test (or interview) is an entrance requirement for the program. Your choices are *N/A, No, Unknown,* and *Yes.*

Experience Rqmt (experience requirement)
Indicate whether previous related experience is an entrance requirement for the program. Your choices are *N/A, No, Unknown,* and *Yes.*

Other Rqmt (other requirement)
Indicate whether any other entrance requirements are required for entry into the program. Your choices are *N/A, No, Unknown,* and *Yes.*

Defining ESIS Plan Mapping 3 Values

Access the ESIS Plan Mapping 3 page.



ESIS Plan Mapping 3 page

Mandatory Paid OJT Duration (mandatory paid on the job training duration)
Enter the duration of mandatory paid on the job training (OJT) activities that are a regular part of the program.

Man Paid Units (mandatory paid units)
Enter the unit type for the Man Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Optional Paid OJT Duration (optional paid on the job training duration)
Enter the duration of optional paid on the job training (OJT) activities that are a regular part of the program.

Opt Paid Units (optional paid units)
Enter the unit type for the Optional Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Mandatory Unpaid OJT Duration (mandatory unpaid on the job training duration)
Enter the duration of mandatory unpaid on the job training (OJT) activities that are a regular part of the program.

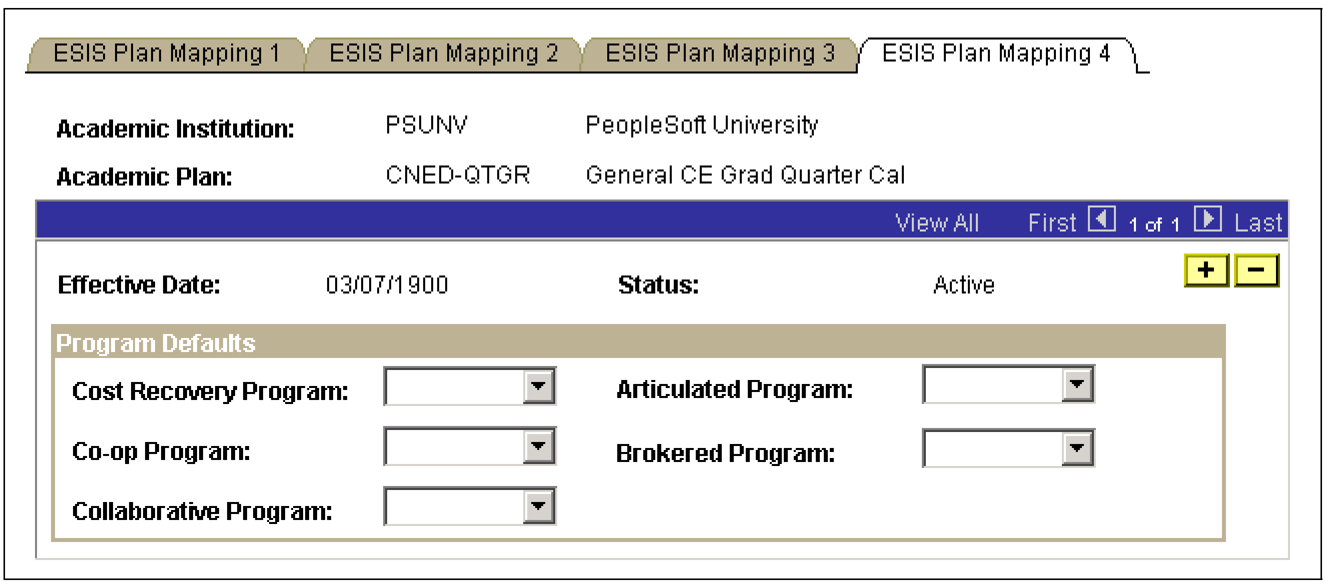
Man Unpaid OJT Units (mandatory unpaid on the job training units)
Enter the unit type for the Mandatory Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Optional Unpaid OJT Duration (optional unpaid on the job training duration)
Enter the duration of optional unpaid on the job training (OJT) activities that are a regular part of the program.

Opt Unpaid OJT Units (optional unpaid on the job training units)
Enter the unit type for the Optional Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of N/A if you do not enter a duration value.

Defining ESIS Plan Mapping 4 Values

Access the ESIS Plan Mapping 4 page.



ESIS Plan Mapping 4 page

Cost Recovery Program
Indicate whether the program is a cost recovery program.

Articulated Program
Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulation agreement.

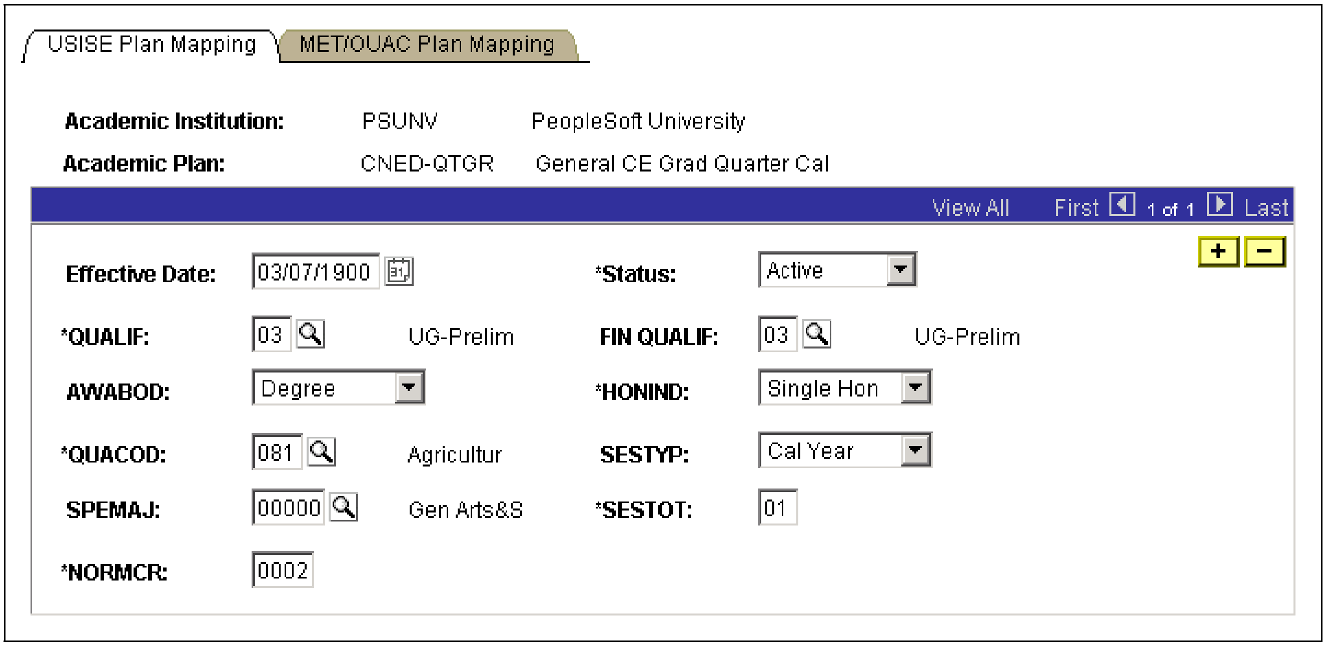
Co-op Program
Indicate whether this is a co-op program.

Brokered Program
Indicate whether the program is a brokered program.

Collaborative Program
Indicate whether the program is offered under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers part of the program.

Defining USISE Plan Mapping Values

Access the USISE Plan Mapping page.



USISE Plan Mapping page

QUALIF Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. The system reports this value in the Fall submission.

FIN QUALIF Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. FIN QUALIF values are reported in all submissions excluding the one in the Fall.

AWABOD Enter the government code that represents the body awarding diploma or certificate.

HONIND Enter the government code that represents the honors program indicator.

QUACOD Enter the government code for coded title of qualification. This field prompts against the Can Report QUACOD table.

SESTYP Enter the government code that represents the type of session.

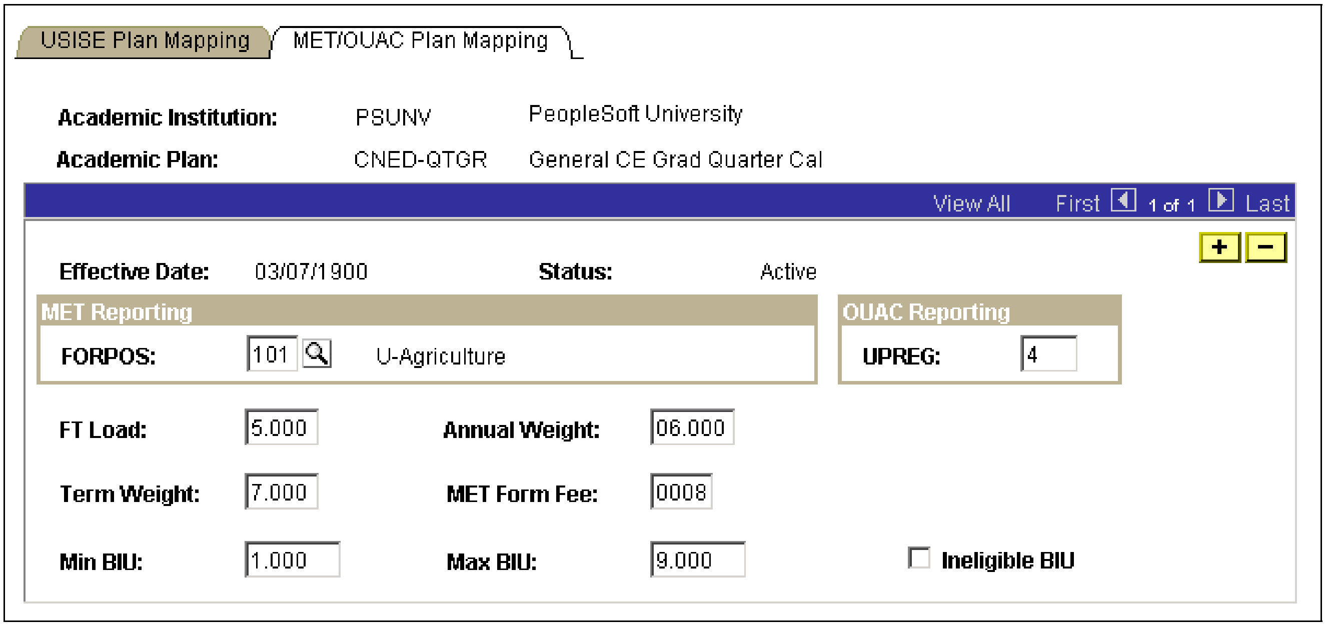
SPEMAJ Enter the government code for specialization or major field of study. This field prompts against the Can Report SPEMAJ table.

SESTOT Enter the government code that represents the total number of sessions required to compete the program.

NORMCR Enter the government code that represents the normal credit/course/unit requirements.

Defining MET/OUAC Plan Mapping Values

Access the MET/OUAC Plan Mapping page.



MET/OUAC Plan Mapping page

FORPOS (formula program of study) — Enter the government code that represents the formula program of study.

UPREG (university and program registration) — Enter the government code that represents the university and program in which the applicant registers.

FT Load — Enter the full time load for an academic program and plan as the institution defines it.

Annual Weight — Established by MET and based on the FORPOS code. Weight varies for diploma and degree programs. Weights also differ from one institution to another for institution specific FORPOS codes.

Term Weight — Enter a value that the system uses when calculating the annual business income unit (BIU) for graduate levels.

Met Form Fee — Established by MET, based on the FORPOS code.

Min BIU (minimum business income unit) — Enter the minimum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.

Max BIU (maximum business income unit) — Enter the maximum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.

Ineligible BIU (ineligible business income unit) — Select this check box to indicate the academic program and plan is ineligible and the system should therefore not include it in the calculation of FTE (full time equivalency).

Defining CIS Program, Plan, and Subplan Tables

This section discusses how to define CIS program, plan, and subplan values.

Pages Used to Define CIS Program, Plan and Subplan Values

Page Name	Object Name	Navigation	Usage
CIS Program Table	CAN_CIS_PROG	Government Reporting, Government Reporting Canada, Setup Acad, Cdn CIS Program Table, CIS Program Table	CIS: Define the CIS program table.
CIS Plan Table	CAN_CIS_PLAN	Government Reporting, Government Reporting Canada, Setup Acad, Cdn CIS Plan Table, CIS Plan Table	CIS: Define the CIS plan table.
CIS Subplan Table	CAN_CIS_SUBPLAN	Government Reporting, Government Reporting Canada, Setup Acad, Cdn CIS Subplan Table, CIS Subplan Table	CIS: Define the CIS subplan table.

Defining the CIS Program Table

Access the CIS Program Table page.

CIS Program ID Enter the nine-digit CIS program ID. This is a unique and permanent identifier for the specified institution and program.

Major Field 1 Enter the description of the major field of study.

Defining the CIS Plan Table

Access the CIS Plan Table page.

CIS Program ID Enter the nine-digit CIS program ID. This is a unique and permanent identifier for the specified institution, program and plan.

Major Field 1 Enter the description of the major field of study.

Defining the CIS Subplan Table

Access the CIS Subplan Table page.

CIS Program ID Enter the nine-digit CIS Program ID. This is a unique and permanent identifier for the specified institution, program, plan, and sub-plan.

Major Field 2 Enter the description of the minor field of study.

Defining ESIS Course Data

This section discusses how to define ESIS course data.

Page Used to Define ESIS Course Data

Page Name	Object Name	Navigation	Usage
ESIS Course Data	CAN_RPT_CRSE	Government Reporting, Government Reporting Canada, Setup Acad, Cdn ESIS Course Data, ESIS Course Data	ESIS: Define ESIS course data.

Defining ESIS Course Data

Access the Cdn ESIS Course Data page.

Delivered Under Contract Indicate whether the course is created and delivered under contract by the institution to an outside party. Your choices are *N/A, No, Unknown,* and *Yes.*

Brokered Course Indicate whether the course is brokered.

Retraining/Skills Upgrade Indicate whether the course is for workplace retraining or skills upgrade.

Cost Recovery Indicate whether this is a cost recovery course.

Province Enter the province that corresponds to the province course funding code. This field controls the view of the CAN_PROV_FNDCRS record.

Prov Fund Cd (province funding code) Enter the provincial code that indicates the course funding code.

Mapping Canadian School Codes to External Organizations

This section discusses how to map Canadian school codes to external organizations.

Page Used to Map Canadian School Codes to External Organizations

Page Name	Object Name	Navigation	Usage
Canadian External School	CAN_EXT_SCHOOL	Government Reporting, Government Reporting Canada, Setup Def, External School Table, Canadian External School	CIS, ESIS: Map Canadian school codes to external organizations. In add mode, specify an External Org ID and Report Type.

Mapping Canadian School Codes to External Organizations

Access the Canadian External School page.

Institution Code Enter the institution code to which you want to map the external org ID and school type.

Defining ESIS Student Data

This section discusses how to define various types of ESIS data for students.

Pages Used to Define ESIS Data for Students

Page Name	Object Name	Navigation	Usage
Bio/Demo Data	SA_BIO_DEMO_DATA3	Build Community, Bio/Demographic Data, Use, Bio Demo Data, Bio/Demo Data	ESIS: Define Canadian Bio/Demo data.
External Courses	EXT_COURSE	Manage Student Records, Process Transfer Credit, Use, Education, External Courses	ESIS: Define transfer credit data.
Canadian Data	CAN_EXT_ACAD_DATA	Manage Student Records, Process Transfer Credit, Use, Education, Canadian Data	ESIS: Define previous education information.
Cdn Student Program (Canadian student program)	CAN_RPT_STD_ENR	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Cdn Student Program	ESIS: Define student program data.
Cdn Student Enrollment (Canadian student enrollment)	CAN_RPT_STDNT_CRSE	Manage Student Records, Manage Academic Records, Use, Enrollment, Cdn Student Enrollment	ESIS: Define student enrollment data.

Defining Canadian Bio/Demo Data

Access the Bio/Demo Data page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Entering Basic Bio/Demo Data

Defining ESIS Transfer Credit Type Data

Access the External Courses page.

Specify a transfer credit type value.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Tracking External Education Information," Entering and Updating External Courses

Defining ESIS Previous Education External Data

Access the Canadian Data page.

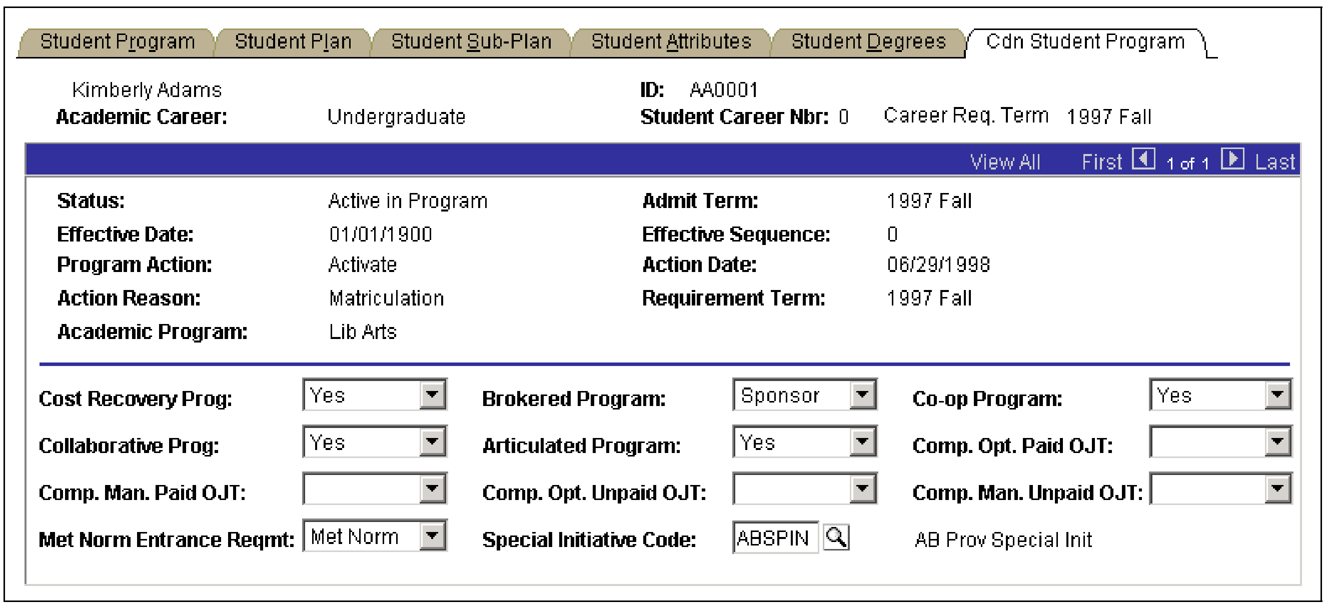
Specify previous educational activities and postsecondary credential information.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Tracking External Education Information," (CAN) Entering and Updating ESIS Data

Defining ESIS Student Program Data

Access the Cdn Student Program page.



Cdn Student Program page

Cost Recovery Prog (cost recovery program) — Indicate whether the student is taking the program on a cost recovery basis.

Brokered Program — Indicate whether the student is taking the program under a brokering agreement or study agreement whereby the institution that owns the program contracts the delivery of all or part of the program to a host institution.

Co-op Program — Indicate whether the student is classified as a co-op student in this program.

Collaborative Program — Indicate whether the student is taking the program under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers parts of the program.

Articulated Program — Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulated transfer agreement.

Comp. Opt. Paid OJT (completed optional paid on the job training) — Indicate whether the student has completed the optional paid OJT requirements for the program.

Comp. Man. Paid OJT (completed mandatory paid on the job training) — Indicate whether the student has completed the mandatory paid OJT requirements for the program.

Comp. Opt. Unpaid OJT (completed optional unpaid on the job training) — Indicate whether the student has completed the optional unpaid OJT requirements for the program.

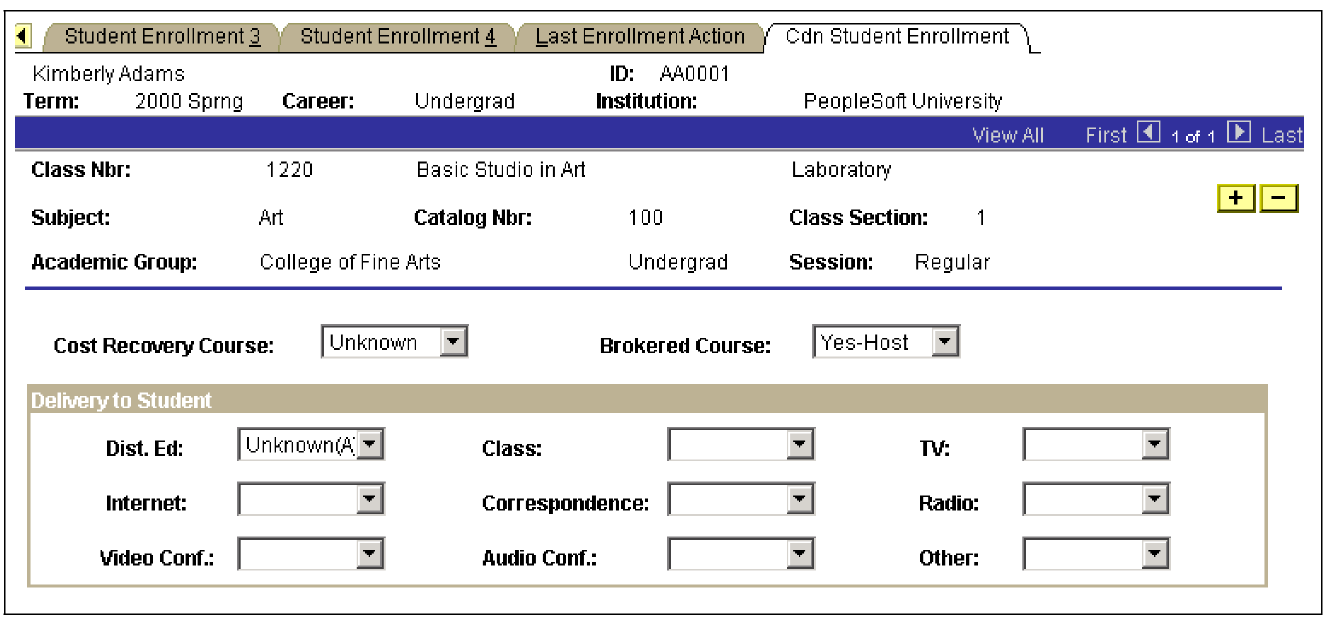
Comp. Man. Unpaid OJT (completed mandatory unpaid on the job training) — Indicate whether the student has completed the mandatory unpaid OJT requirements for the program.

Met Norm Entrance Reqmt (met normal entrance requirement) — Indicate whether the student met the normal entrance requirements of the program.

Special Initiative Code — Indicate the special initiative code associated with the student in the program as specified by the provincial ministry, institution, or other agency. This field prompts against the CAN_PROV_SP_INT record.

Defining ESIS Student Enrollment Data

Access the Cdn Student Enrollment page.



Cdn Student Enrollment page

Cost Recovery Course	Indicate whether the student took the course on a cost recovery basis. The system populates this field by default to the CAN_RPT_CRSE record.
Brokered Course	Indicate whether the student is taking the course under a brokering agreement, whereby the institution that owns the course contracts the delivery of the course to a host institution. The system populates this field by default to the CAN_RPT_CRSE record.
Dist. Ed. (distance education)	Indicate whether the student's course section or class is considered by the institution to be a distance education course. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Class	Indicate whether the student received instruction in this course in whole or in part by classroom instruction (including labs), in which the instructor was physically located in the same room or lecture hall as the student. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
TV (television)	Indicate whether the student received instruction in this course in whole or in part by television. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Internet	Indicate whether the student received instruction in this course in whole or in part on the internet, including email and internet conferencing. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Correspondence	Indicate whether the student received instruction in this course in whole or in part by postal correspondence, including tapes and CDs sent by mail. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Radio	Indicate whether the student received instruction in this course in whole or in part by radio. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Video Conf. (video conference)	Indicate whether the student received instruction in this course in whole or in part by video conferencing, excluding conferencing on the internet. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Audio Conf. (audio conference)	Indicate whether the student received instruction in this course in whole or in part by audio conferencing. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.
Other	Indicate whether the student received instruction in this course in whole or in part by some other method of instruction. Mapping only needs to be completed at this level if the student received instruction for the course in a manner different from the course delivery mode.

Loading the Student ID Table

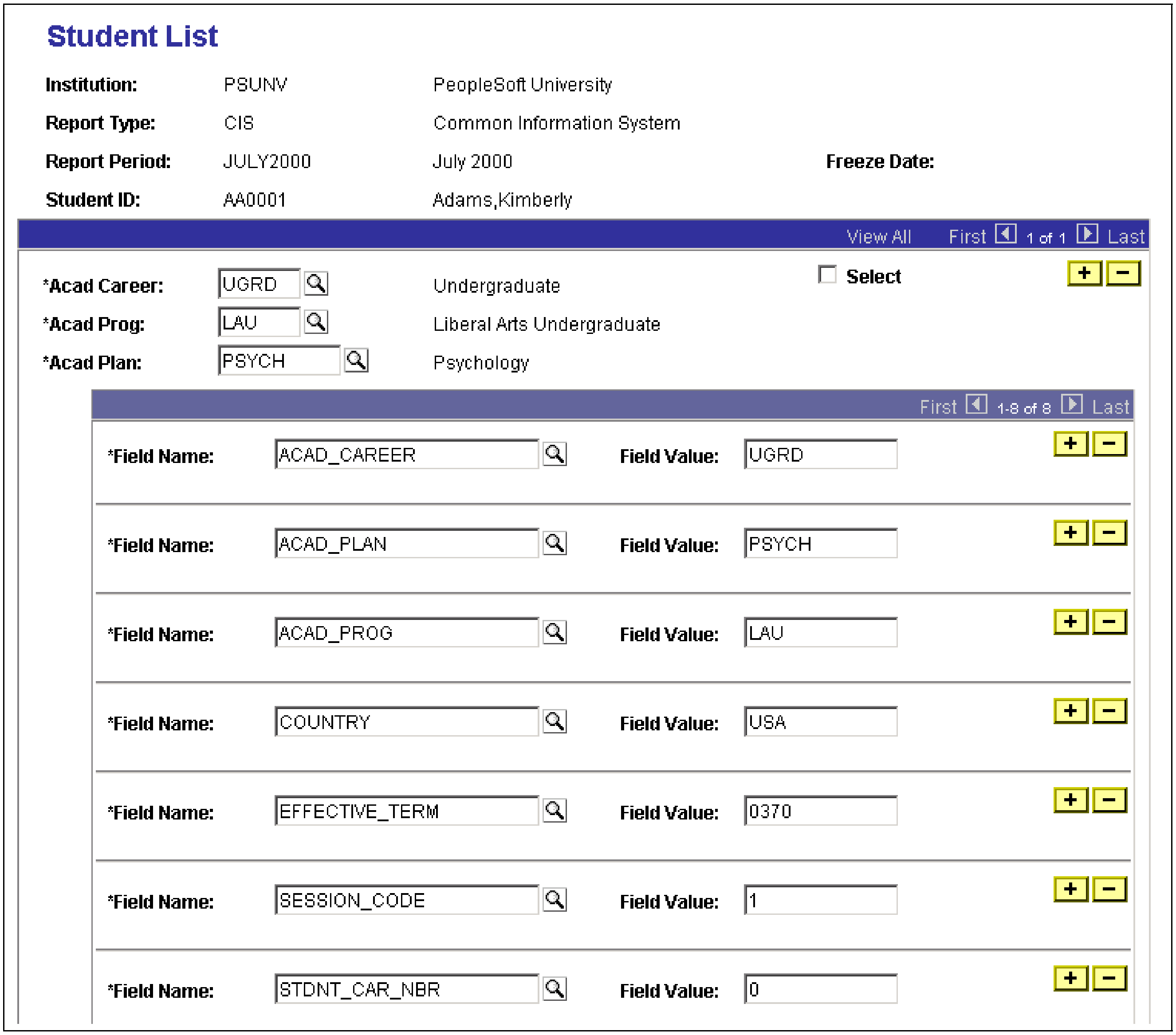
This section discusses how to load the student ID table.

Page Used to Load the Student ID Table

Page Name	Object Name	Navigation	Usage
Student List	CAN_STDNT_LST	Government Reporting, Government Reporting Canada, Use, Student List, Student List	All: Load student data to prepare for the extract process.

Loading Student Data

Access the Student Data page.



Student List page

Each institution’s business practices and interpretation of the published government rules result in different criteria for selecting students for reporting. To initiate the reporting process, you must populate (either manually or through a user defined process) the PeopleSoft provided Student List component with the eligible students you want to report. The Student List component contains the fields listed below. You must populate each field for *every* row in this component; otherwise the reports extract will exclude the row and the process may fail.

Institution	Enter the institution for which you want to report.
Report Type	Enter the report type you want to use.
Report Period	Enter the report period.
Student ID	Enter the student ID for the student you want to report.
Acad Career (academic career)	Enter the academic career you want to report for the student. You can insert an additional row to report multiple careers, programs, or plans.

Acad Program (academic program) Enter the academic program you want to report for the student.

Acad Plan (academic plan) Enter the academic plan you want to report for the student.

Select Select this check box to identify a subset of students for whom you want to run the extract and flat file process. The extract process adds or replaces reporting data for these students. The system clears this check box after you run the extract process for this report. At run time, you can specify to run the process for only those students who have the “Select” option selected.

Field Name Enter a row for each field name that you need for this report. For example, STDNT_CAR_NBR.

Field Value Enter a field value that corresponds to each field name value. The report extract process uses this data. For example, *0.*

The system calculates elements for each row of the table. There is a one to one relationship between a row on the Student List page and a row on any one of the tables that enable you to view the information calculated by the extract program. If a student has more than one row on the Student List page, the system treats each row as if it is for a new student when retrieving the element values for the row.

Loading the Student Key Data

In addition to entering data in all of the header fields, different government reports require that you also enter various types of key data. Use the following table to determine which fields and corresponding field values you must populate before you run the extract process.

Field Name	Required by Report Type
ACAD_CAREER	ALL
ACAD_PROG	ALL
ACAD_PLAN	ALL
ACAD_SUB_PLAN	CIS
ADM_APPL_NBR	OUAC
AID_YEAR	CIS, ESIS
APPL_PROG_NBR	OUAC
EFFECTIVE_TERM	CIS, ESIS, MET, USISE
EFFSEQ	OUAC

Field Name	Required by Report Type
SESSION_CODE	CIS, MET, OUAC, USISE
STDNT_CAR_NBR	ALL
STRM	ALL

Note. Enter the latest STRM value for the student for the applicable report type and report period. For example, if the report includes terms for Spring 99 and Fall 99, enter the term representing Fall 99 as the STRM value, assuming that the student was enrolled in both terms.

CHAPTER 16

Performing Repeat Checking

This chapter provides an overview of the repeat checking methods and discusses how to run the Repeat Rule Checking process in batch.

Understanding the Three Repeat Checking Methods

The PeopleSoft Student Records repeat checking functionality is a flexible and robust process. Much of repeat checking occurs automatically, behind the scenes. However, PeopleSoft also enables you to run the Repeat Rule Checking process in batch and manually.

Automatic Repeat Checking

The automatic repeat-checking processing occurs when you do the following:

- Post enrollment requests.
- Post grades using the Enrollment Request page.

  Repeat checking does *not* occur when you post grades using the Student Enrollment page, the Quick Enrollment page, or the grade roster.
- Post transfer credit.

With the automatic repeat-checking processing, you do not have to run a process through the process scheduler to check for repeats (although that is another option). Once you perform a little setup, the system runs the process automatically.

It is important to note the slight differences between the automatic repeat-checking processing through enrollment request grade posting and the automatic repeat-checking batch processing following grade posting and transfer credit posting.

When students attempt to enroll in classes, the Repeat Rule Checking process scans the student's course history for a course ID or equivalent course ID that matches the requested course ID. If the process finds a matching pair, it can do one of three things: issue a warning that repeat codes might apply and that the enrollment might not count towards the student's degree, prevent the enrollment, or ignore the match. Note that the process does not assign repeat codes to the repeated course at this stage.

When you post grades (using the Enrollment Request page) and transfer credit, the Repeat Rule Checking process likewise scans the student's course history for a course ID or equivalent course ID that matches the ID of the course for which you are posting the grade or transfer credit. If the process finds a matching pair, it evaluates each course of the pair based on the repeat rules that you have created. Because the process can no longer prevent enrollment because the student has already taken the class, it assigns a repeat code. The process assigns a violation repeat code to the repeated course when the repeated course causes the student to exceed the total units allowed or total attempts allowed (as defined first on the Repeat Rule 2 page and later for each rule on the Repeat Rule Detail 1 page). Or, the process assigns a repeat code to both courses in the matched pair when the repeated course is in violation of a particular repeat rule.

For example, you can set up a rule for the undergraduate career that allows students to repeat twice those courses in which they receive a failing grade. The Repeat Rule Checking process scans the student's history to identify other instances of this particular course ID or equivalent course ID. Once the process finds a repeat and establishes the matched pair, it evaluates the current course to see if it violates the repeat rule's total attempts allowed and total units allowed. If either maximum has been exceeded, the Repeat Rule Checking process assigns a violation repeat code to only the current course in the matched pair. However, if the process determines that the repeat violates any of the established rules, it assigns repeat codes to the matched pair of courses.

Because automatic repeat checking during peak enrollment and grade-posting periods can negatively impact the performance of your system, you can temporarily suspend automatic repeat checking for the entire academic institution on the Academic Institution 5 page, for an academic career on the Repeat Checking page (Academic Career Table component), and for academic programs on the Taxonomy page (Academic Program Table component).

Repeat Checking in Batch

Run the Repeat Rule Checking process in batch through the Repeat Checking page or set up the Process Scheduler to run the process automatically. Once grades are posted, you can run repeat checking in batch at whatever point in the term you see fit. However, you should not run the batch process more than once per term because codes that have been set in the first run can be inadvertently changed in subsequent runs.

When you use the grade roster to post grades, you must run the batch process to check courses against your repeat rules. The automatic Repeat Rule Checking process runs only when grades are posted using the Enrollment Request page. Therefore, one way to use the repeat checking in batch functionality is to run the batch process after most of your grades have been posted on the grade roster. Then, you can run repeat checking on grade input for individual students whose grades are posted after the batch process has been run.

You can run the repeat checking in batch for all students in an entire academic career, academic program within an academic career, or for individual students. Repeat checking in batch can also be term-driven, running from a specific term and moving back in time.

Assigning Repeat Codes Manually

You can manually assign repeat codes to a student's record. For special individual cases, you can go into the student's record through the Student Enrollment page, the Quick Enrollment page, or the Enrollment Request page—depending on your security access—and select a value for the Repeat Code field. You can also use this method to change the repeat codes that the automatic process assigned. Assigning repeat codes manually affects academic statistics just as it would if the repeat codes were assigned through the Repeat Rule Checking process.

In addition, repeat rules contain certain exemption conditions. You can set up exemption codes on the Repeat Rule 2 page and manually assign these codes to a specific class on the Student Enrollment 1, Enrollment Request, or Quick Enrollment page. When the Repeat Rule Checking process finds a repeat, and the repeat rule specifies that an exemption exists, the process looks to see if the repeat code that is exempted is assigned to the student's record.

For example, a repeat rule might demand that a repeat be approved by petition. Thus, an *Approved via Petition* repeat code would be listed as an exemption, so that once a student received the approval, you could assign the appropriate repeat code to the student's enrollment record. The Repeat Rule Checking process would identify the enrollment as a repeat, but, when it finds the exempted repeat code on the current class, it would allow the enrollment. Exemption codes function for both front-end and back-end repeat check processing, allowing overrides to the total attempts allowed and total units allowed maximums established on the Repeat Rule 2 page.

See Also

Chapter 3, "Setting Up Repeat Checking," page 37

Running the Repeat Rule Checking Process in Batch

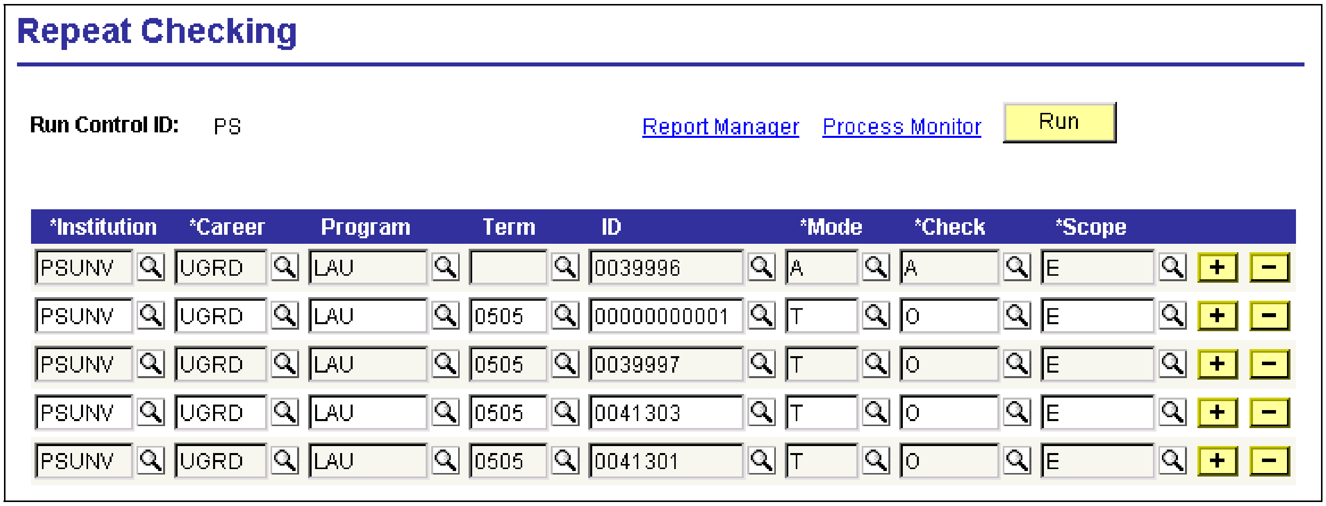
This section discusses how to run the Repeat Rule Checking process (SRPCERPT) in batch.

Page Used to Perform the Repeat Rule Checking Process in Batch

Page Name	Object Name	Navigation	Usage
Repeat Checking	RUNCTL_SR_RPTRULE	Manage Student Records, Manage Academic Records, Process, Repeat Checking	Run the Repeat Rule Checking COBOL/SQL process (SRPCERPT) in batch, or set up the process scheduler to run the process automatically.

Running the Repeat Rule Checking Process

Access the Repeat Checking page.



Repeat Checking page

You can run Repeat Rule Checking process in batch at whatever point in the term you see fit—however, you should not run the batch process more than once per term because codes that have been set in the first run can be inadvertently changed in subsequent runs.

Institution Select the academic institution for which you want to run the process. (Required)

Career Select the academic career within the academic institution, or the academic career for a particular student, for which you want to run the process. If you do not select an academic program and ID, the process checks for repeats for every student in this academic career (you can also narrow the search by term).

Program Select the academic program for which you want to run the process. If you do not select an ID, the process checks for repeats for every student in this primary academic program (you can also narrow the search by term).

Term Select the term for which you want to run the process. The system uses the start date of the term as the effective date and uses repeat rules that are valid for the term.

ID If you want to check for repeats for particular students, select an ID. If you do not specify an ID, the process runs on all students in the academic career, primary academic program, and term that you selected.

Mode Select from the following choices the mode for the repeat process. The system uses the aspect of the student's record that you select.

All/Entire Record: The Repeat Rule Checking process starts at the beginning of the student's record and progresses forward to the current term, considering all courses within the student's record. This mode is ideal for processing over many terms that have never been processed for repeat checking, for example, after converting student data. You should not specify values for the Term field when you run the Repeat Rule Checking process in the *All/Entire Record* mode.

Entire Term: Checks for repeats against *only* the student enrollment records within the term that you specify in the Term field. The process starts with the specified term and progresses back in time looking *only* for matches of classes that were taken within the specified term. The Term field is required when running the process in this mode. This is the standard mode to use when running repeat checking in batch at the end of each term.

Check Select from the following choices which aspects of the student's enrollment records (STDNT_ENRL) the process should check.

All Courses: The process analyzes all student enrollment records within the mode and scope that you select.

Only Repeat Candidates: The process analyzes only those courses in the selected process term where the repeat candidate flag on the STDNT_ENRL table is set to *Y.* Courses in prior terms can contain either a *Y* or *N* value.

Scope Select from the following choices the scope of the process.

All Work for Term: The process considers all of the course work on the student's enrollment records, including course transfer credit.

Student Enrollments Only: The process considers only courses where the student enrolled through the internal academic institution. Credit received by transfer is not considered.

Transfer/Test Credit: The process considers only course transfer credit.

Determining the Sequence of Courses

The Repeat Checking COBOL/SQL process identifies courses in matched pairs and applies the repeat rules to a student's enrollment record of those courses, based on their sequence in the student's academic history. There are four types of credit that a student can receive for courses: enrollment, internal, external, and manual. Based on the type of credit, the Repeat Rule Checking process uses the following logic to find the sequence of courses:

Type of Credit	Repeat Checking Logic
Enrollment	The Repeat Rule Checking process determines the sequence of courses, based on the term begin date of each course in the match. For example, if course A was taken in term 330 and course B in term 350, then the sequence would be B then A.
Internal	The Repeat Rule Checking process determines the sequence of courses, based on the term begin date of the source term of the internal transfer credit.

Type of Credit	Repeat Checking Logic
External	The Repeat Rule Checking process checks repeats for the student's external transfer credit, based on the sequence of classes in the match. The sequence of classes is based on a date representing the beginning of the external terms in which the classes were taken. For each class, the system finds this date by first finding the term year in the EXT_COURSE table. Then, on the same page, the system looks at the values in the Term Type and External Term fields. Using these values, the system looks up the External Term page where the begin month is located. For example, if the Term Type field shows *Semester* and the External Term field shows *Fall,* then the system looks at the begin month on the External Term page for semester and fall. If this lookup is successful, the system uses the following criteria: (term = term year, month = begin month code, day = 01). So the derived date for term year 1999 and an external term of fall (SEM) with a begin month of 08 (August) would be 1999-08-01. The system finds this date for each match found in the Repeat Rule Checking process, and these dates determine the sequence of classes. If the term year is blank, the system substitutes *1900.* If the external term is blank, it uses *01 (January)* for the begin month code. The day is always *01.*
Manual	The Repeat Rule Checking process determines the sequence of courses for manual transfer credit by first looking at the Year and the External Term fields on the Transfer Course Entry page. Using the value in the External Term field and the external term type *QTR* (quarter), the system looks up the External Term page, where the begin month is located. If no match is found, the system uses the *SEM* (semester) term type. With the same equation as with external credit, the system finds the year, begin month code, and day for each course in the match. If there is no matching row for *SEM* or *QTR,* the system assigns *01* to the month code. If the External Term field is blank, the system assumes that it is *01.* If the Term Year field is empty, the system uses *1900.*

See Also

Chapter 3, "Setting Up Repeat Checking," Defining Repeat Rules, page 41

Using PeopleSoft Applications

Chapter 17

Managing the Schedule of Classes

This chapter gives an overview of the schedule of classes and explains how to:

- Schedule new classes.
- Modify scheduled classes.
- Modify scheduled class meetings.
- View and update class sections.
- Roll data from the course catalog.
- Define class associations.
- Define class permissions.
- Create combined sections.
- Schedule examinations.
- Modify course events.
- View instructor schedules.
- View facility use for a class.
- Search for an available facility.
- Search for classes.
- Print the Schedule of Classes report.
- Copy classes from one term to another.
- Clearing the Resource Queue table.

Understanding the Schedule of Classes

When you first set up your PeopleSoft Student Records system, you schedule new courses for the first time. From that point on, you'll likely roll classes from term to term, add any new courses to your schedule, and if necessary, revise classes that are already scheduled.

Note. Once you set up your course schedule for the first time, you can set parameters along the way that command the system to roll, or copy, certain courses from term to term, and you can request that certain verifications are made against a student's record at enrollment request time. Once you copy a prior term schedule to a new term, you can use the schedule of classes component to move existing courses from time period to time period, to add sections, and so on.

The scheduling features in the PeopleSoft Student Records application include the following four components:

1. Schedule of Classes
2. Schedule New Course
3. Schedule Class Meetings
4. Schedule Class Section

The difference between these components is the view of the classes that you see.

- The Schedule of Classes component displays only those courses that have already been scheduled for a term. Instead of having to wade through every course available you can use the schedule of classes component to view just those courses you have already scheduled.
- The Schedule New Course component displays all courses available to schedule.
- The Schedule Class Meetings component displays individual class sections that have been scheduled.
- The Schedule Class Section component displays a snapshot summary of section information for a class. You can use this component to view and make changes to individual class sections so that when you save any changes to a section the system performs the save process faster.

Other features of the class schedule function that we discuss in this section include how you create class associations and student permissions for enrollment. We also move through the "combined sections" functionality so you get an introduction of the power of the tools, and we review instructor schedules and class meeting patterns. Finally, we will explore the facility search capabilities, producing the schedule of classes report, and copying classes from term to term.

Prerequisites

Before you schedule classes, you must first set up the following for your institution:

- Course catalog.
- Academic calendar, including terms and sessions.
- (Optional) Requisite groups.
- (Optional) Equivalency groups.
- (Optional) Facilities.

See Also

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," page 9

Scheduling New Classes

This section provides an overview of new class scheduling, and discusses how to:

- Define basic class data.
- Define class meeting patterns.
- Define auto enroll options.
- Define reserve capacity.
- Link class notes to sections.
- Link exam times to classes.
- Interface class sections with the general ledger.

Understanding New Class Scheduling

PeopleSoft Student Records possesses a great feature for easing your data entry in the schedule of classes. There are four primary components: Schedule New Course, Schedule of Classes, Schedule Class Meetings, and Schedule Class Section. The components are identical, except their search mechanisms differ.

The Schedule New Course component enables you to view *all* courses from the course catalog that can be scheduled. The Schedule of Classes component enables you to view *only* those courses that have been scheduled for a term. The Schedule Class Meetings component enables you to view the Meetings page, the Enrollment Cntrl (enrollment control) page, and the Exam page, and make edits without accessing the entire class and all of its sections in the schedule of classes. The Schedule Class Section component enables you view *only* individual class sections of a course that have been scheduled for a term.

We will review the Schedule New Course component first, since it is where you begin.

Here's how to schedule a class:

1. Define sections, special class fees, topics, attributes, and course administrator information on the Basic Data page.
2. Enter class meeting times, days, facilities, instructors, and room characteristics on the Meetings page.
3. Define class status, capacity, auto enroll and resection to section numbers on the Enrollment Cntrl (enrollment control) page.
4. Define reserve capacity and enrollment requisites on the Reserve Cap page.
5. Link notes to class sections on the Notes page.
6. If you are manually scheduling exams for class sections, enter exam information on the Exam page.
7. Assign classes (class item types) to specific general ledger accounts on the GL Interface page.

Prerequisites

Before you can schedule a new class, you must:

- Define your academic calendar, repeat rules, and course catalog.
- Define your facility IDs, topic IDs, and your instructor workload assignment types (if applicable).

- Define your reserve capacity enrollment requirement groups (if applicable).
- Define your reserve capacity enrollment requirement groups (if applicable).
- Define your reserve capacity enrollment requirement groups (if applicable).
- Define your note numbers (if applicable).
- Define your exam time codes and exam types (if applicable).
- Define your GL values.

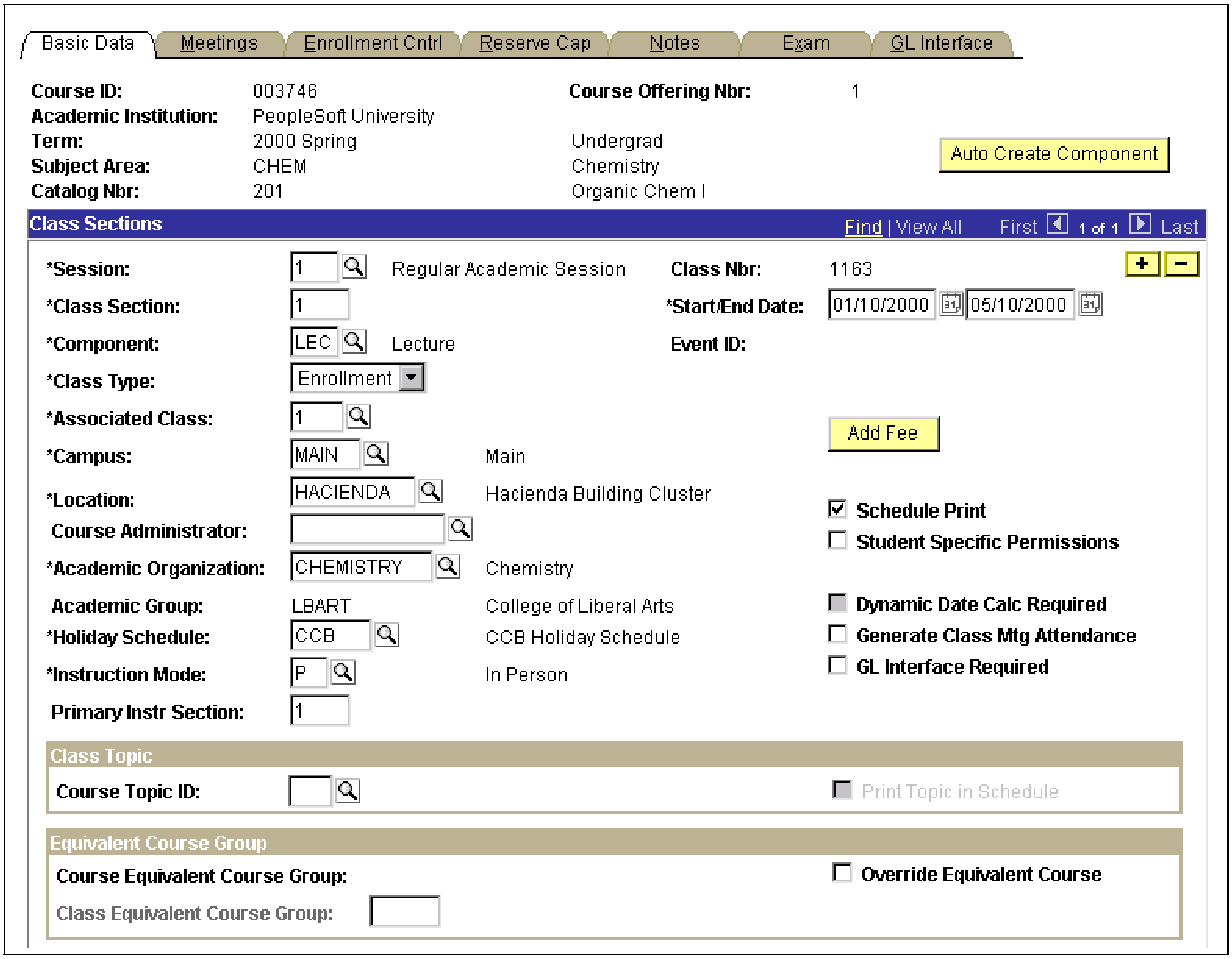
Pages Used to Schedule a Class

Page Name	Object Name	Navigation	Usage
Basic Data	CLASS_ENTRY	• Manage Student Records, Establish Courses, Use, Schedule New Course, Basic Data • Manage Student Records, Establish Courses, Use, Schedule of Classes, Basic Data	Define sections, add specific class fees, topics, attributes, and designate a course administrator.
Meetings	CLASS_MTG_PATTERN	• Manage Student Records, Establish Courses, Use, Schedule New Course, Meetings • Manage Student Records, Establish Courses, Use, Schedule of Classes, Meetings • Manage Student Records, Establish Courses, Use, Schedule Class Meetings	Define class meeting patterns and facilities, link instructors to classes, assign instructor workload values, and specify room characteristics.
Instructor Contact Hours	CLASS_MTG_PAT_HRS	Click the Contact Hours link on the Meetings page.	Review total course contact hours, weeks of instruction, and other contact hours information.
Combined Section Detail	CLASS_CMBND_SEC	If available, click the Combined Sections link on the Meetings page.	Review all of the classes in the combined section
Enrollment Cntrl (enrollment control)	CLASS_ENRL_CNTL	• Manage Student Records, Establish Courses, Use, Schedule New Course, Reserve Cap • Manage Student Records, Establish Courses, Use, Schedule of Classes, Reserve Cap	Set enrollment limits and capacity requirements, and to identify sections for which you want the system to auto enroll students.

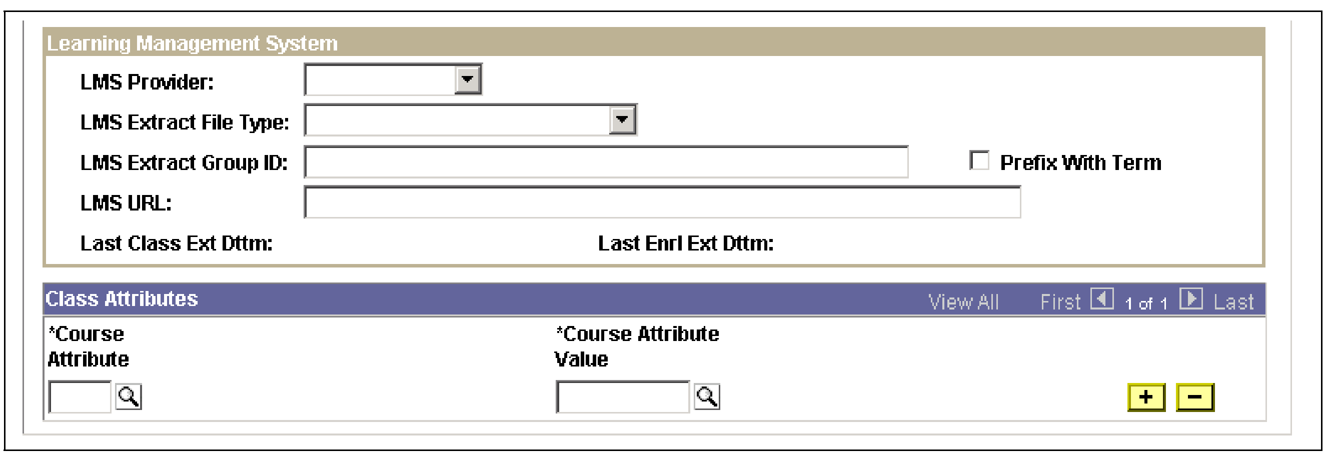
Page Name	Object Name	Navigation	Usage
Reserve Cap (reserve capacity)	CLASS_RSRV_CAP	• Manage Student Records, Establish Courses, Use, Schedule New Course, Reserve Cap • Manage Student Records, Establish Courses, Use, Schedule of Classes, Reserve Cap	Assign reserve capacities for class sections. You can define any number of reserve capacity groups for a class. Reserve capacities are defined through the Enrollment Requirement Group component. When a student enrollment request is processed, the system automatically searches through the reserve capacities in sequential order and places the student in the first group with an available spot for which the student qualifies based on the reserve capacity group rules.
Notes	CLASS_NOTES	• Manage Student Records, Establish Courses, Use, Schedule New Course, Notes • Manage Student Records, Establish Courses, Use, Schedule of Classes, Notes	Link existing class notes or free-form text notes to class sections.
Exam	CLASS_EXAM	• Manage Student Records, Establish Courses, Use, Schedule New Course, Exam • Manage Student Records, Establish Courses, Use, Schedule of Classes, Exam	Manually schedule final exams for class sections.
GL Interface	CLASS_TBL_GL	• Manage Student Records, Establish Courses, Use, Schedule New Course, GL Interface • Manage Student Records, Establish Courses, Use, Schedule of Classes, GL Interface	Map class section fees as item types to their proper General Ledger Accounts. The system generates charges to the student's account based on the class and course code you define in this component and offsets these charges based on the General Ledger you define in this page. Your office needs to coordinate the information on this page with your controller's office.

Defining Basic Data for Class Sections

Access the Basic Data page.



Schedule of Classes - Basic Data page (1 of 2)



Schedule of Classes - Basic Data page (2 of 2)

Auto Create Component

Click to have the system automatically create one component for each of the components you have selected to auto create on the Course Catalog - Components page. The system populates the pages in the schedule of classes with the required data for first of each component. This saves you data entry and ensures that one section for each component is scheduled. If you have multiple class sections for each component type, you must still define the remaining class sections manually.

Class Section For each component that the system creates automatically, enter the class section number. The system defaults into the Class Schedule Entry page the field values of the pre-existing class section.

Note. If you have begun to schedule sections of a course and you then click theAuto Create Component button, the process only creates a section for those components that are set to *Auto Create* on the course catalog and have not yet been scheduled.

Session Select the type of session to which the class sections of this course offering belong. If you want to schedule open entry/exit class sections, you must define them within an *OEE* session. Session values are delivered with your system as translate values. You can modify the codes and descriptions of these values except for *OEE,* where you can modify the descriptions only. Any modification to this code requires a substantial programming effort. In order for students to enroll in the OEE class sections that you define, you must either define the OEE Dynamic Date rule for each class section on the Dynamic Class Dates page or the Course Catalog - Offerings page.

Class Nbr (class number) The system creates a unique class number identifier that students can use when they enroll in a class. The class number appears on the Schedule of Classes report. The system increments this number automatically, based on the number you specify on the Term Value page.

Class Section Enter the class section. It must be unique within course offering and session.

Start/End Date The system populates this field by default to the start and end dates of the session (as specified on the Session Table page). You can override the dates for an individual class.

Component The system populates this field by default to the graded component on the Catalog Data page (such as *Lecture, Laboratory, Discussion,* and so on) of the course. You can have multiple components and sections within a course offering.

Class Type The class type of *Enrollment* indicates which section is the primary section at enrollment time. The class type of *Non-Enrollment* is used to indicate that the section choice is the student's secondary enrollment option, or that the section is used in auto-enrollment. Within a class, only one component can possess the class type of *Enrollment.*

For example, at PSUNV Microbiology 240 has *Lecture, Laboratory,* and *Discussion* components. There are 5 lecture, 10 laboratory, and 15 discussion sections. We might select the discussion sections as the *Enrollment* sections, the lecture sections as the *Non-Enrollment* section using auto-enrollment, and the laboratory sections as *Non-Enrollment* sections with a student choice of lab section at enrollment time.

Associated Class

Select an associated class number from the list box, or enter an Associated Class value of your own. By using associated class numbers, you link class sections that constitute a single course offering. For instance, in our previous example, we'd gather a certain number of lecture, lab and discussion sections into one Associated Class number to indicate that the three components are related to one another. If you are scheduling a new section, the system populates the Associated Class field to 1 by default.

When you schedule the first section of a course offering and use the prompt box, the system only displays this default value. You can use a prompt value, or you can manually enter any new one to four digit number into the field. Upon saving the page, the system extracts the necessary course data from the course catalog, creates a row in the Class Associations component for this class association number, and populates the row with the appropriate course catalog data. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course from within the same associated class number.

If you add a new class associations value to a scheduled class, and you want to make changes to the class association data that the system extracts from the course catalog, you must make your changes on the Class Associations component.

A special associated class number, *9999*, enables you to associate a section with any other section.

Campus

The system populates the Campus field by default from the Course Catalog - Offerings page, indicating the campus that offers the course. You cannot revise this default. If a specific Campus was not identified in the course catalog and does not default, then you can, on a section-by-section basis, schedule classes at various campuses.

Note. Because you cannot revise the Campus value if one was provided on the course catalog level, it is best if you do not identify a specific campus on the Course Catalog - Offerings page unless absolutely necessary.

Location

Select the location of the campus. Location values are linked to campuses on the Campus Table page. A campus must be specified before you select a location.

Course Administrator

Select the course administrator ID of the person in charge of the course (usually the primary instructor). This field is informational only.

Academic Organization

The system populates the academic organization by default from the Course Catalog - Offerings page. The academic organization refers to the organization that offers the class. You can override this value.

Academic Group

The system populates the academic group by default from the Course Catalog - Offerings page.

Note. You can define global notes by academic group, which can appear on the Schedule of Classes report. In addition, academic group controls the valid meeting pattern values and their corresponding normal class duration values.

Instruction Mode

The system populates this field by default to *In Person,* but you can override the value. The instruction mode indicates whether the class is taught *In Person* or using *Interactive TV, World Wide Web, Correspondence,* and so on. Instruction Mode values are defined on the Instruction Mode page.

Important! You can generate attendance rosters for only those classes with an instruction mode value of *P*.

Primary Instr Section (primary instructional section)

Enter the primary instructional section number if applicable. This field is specifically used for distance learning classes. You can use this field to indicate in which section the instructor resides. This field is for informational purposes only.

Schedule Print

The setting of this check box populates by default to the setting on the Course Catalog - Offerings page. Select this check box to display the class in the schedule of classes. If you clear this check box, the section does not display in the Schedule of Classes - Class Search function if accessed through either the Community Access or Learner Services collaborative applications. Similarly, if you clear this check box, students using the self-service enrollment feature through the Learner Services collaborative application do not see this class in their class search results. They can enroll in the class, but only if they enter the exact class number (without using the class search feature).

Student Specific Permissions

Select this check box to set up student specific class permissions.

Student specific permission numbers enable instructors or administrators to control section enrollment by granting advance permission to individual students.

Include in Dynamic Date Calc (include in dynamic date calculation)

Select this check box to include this component of the class section in the Dynamic Class Dates process. The value you select here populates by default from the corresponding field for the course offering component on the Course Catalog - Components page. For non-primary components of a course offering, this check box is optional. You can override the default value on a section-by-section basis. For primary components, however, the system automatically selects and makes unavailable this check box because the Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses for the primary component the value as defined on the Class Associations - Class Components page. If you decide to include additional components of the class section in the Dynamic Class Dates process calculations, the process includes in its calculations the meeting times that fall within the start date and end date range of the primary component.

For example, let's say that the lecture section is the primary component. The start and end dates for the lecture are ten weeks apart, with the lecture meeting every Monday. Let's also say for the dynamic class date rule, you use a rule scheme for drop dates that is based on the number of class meetings, and that each subsequent class meeting defines the next level drop deadline. If you include only the lecture in the Dynamic Class Date process calculations, the first drop deadline would be the second lecture, the second drop deadline would be the third lecture, and so on. However, let's say that you have a discussion component that meets once every Thursday for ten weeks, starting the same week as the lecture. If you select to also include the discussion in the calculations, the first drop deadline would be the first discussion because it is the second class meeting. The second drop deadline would be the second lecture, the third drop deadline the second discussion, and the final drop deadline the third lecture.

Dynamic Date Calc Required (dynamic date calculation required)

The system automatically selects this check box whenever you make a change to the class meeting pattern or class dates of a class section within a dynamically dated session because these changes can potentially impact the Dynamic Class Date process calculations. When you run the Dynamic Class Dates process using the Process Scheduler (Dynamic Class Dates page), you have the option to use this field as a parameter.

You can thus, for example, recalculate the landmark academic calendar dates for only the classes in which the class meeting pattern has been changed.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Defining Dynamic Academic Calendars".

Generate Class Mtg Attendance (generate class meeting attendance)

Select this check box to indicate that you want the system to always generate attendance rosters for this class. This value defaults from the Course Catalog - Components page each time that you schedule a new course. By selecting this check box, you flag the class so that when you generate attendance rosters through the Attendance Roster Generator page and you select the Obey Generate Class Mtg Attendance check box, the generator creates attendance rosters only for classes that have this flag selected and that meet your processing criteria. If you clear this check box on the Attendance Roster Generator page, the system generates attendance rosters for all classes that meet your processing criteria, regardless of the check box setting on the Basic Data page. You can generate attendance rosters through the Class Attendance page regardless of this check box value.

GL Interface Required

Select this check box to include this class in the GL Interface process. If you select this check box, the system requires you to enter the necessary data into the GL Interface page of this component.

Class Topic

Course Topic ID

Enter a course topic ID to link course topics to class sections. Select a topic ID for the section. Topic ID values are defined on the Catalog Data page. Additionally, you can also attach topics to specific class meeting patterns.

Print Topic in Schedule

If you enter a topic ID, this check box becomes available for entry. The system selects this check box by default. You can change the setting.

Note. In order for the topic to appear on the transcript, you must select the Print Course Topic check box on the Transcript Type - Enrollment/Statistics page.

Equivalent Course Group

Course Equivalent Course Group If the course is linked to an equivalent course group on the Catalog Data page, the system displays that information in this field and the Override Equivalent Course check box becomes available for entry.

Override Equivalent Course Select to override the Catalog Data setting for this class section.

Class Equivalent Course Group Enter another equivalent course group for the class section in this field.

Learning Management System

LMS File Type (learning management system file type) If your institution utilizes the learning management systems feature, enter the LMS file type that you use as your interface. The file type defaults according to the LMS file type on the Course Catalog - Components page. In instances where the Course Catalog - Components page has no LMS File Type, the system uses the setting on the Academic Institution 3 page. Your choices are *XML V1.01, Blackboard CourseInfo 4,* and *WebCT API Input Format.*

LMS Group ID (learning management system group ID) When you select an LMS file type, the LMS Group ID field populates automatically to academic institution, subject area, catalog number, and section number. You may edit this entry, but at run time, the system always appends "term_" to the beginning of the string.

LMS URL (learning management system URL) Enter an LMS URL if you want students to have a direct link to the class's third-party website (if any). The URL entered here appears on the student's self-service study list for the term. The self-service study list is a component of the Learner Services collaborative application, a separately licensed PeopleSoft application.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

Class Ext Dttm (class extract date/time) This field is empty when you first schedule a class, and it automatically populates with a date and time when you extract class data. In addition, the LMS extract process uses this field to distinguish between *Snapshot* and *Update* data. Presence of this date means that a class is "ignored" by the extract process if run in update mode and the record is not new or no changes to the class have taken place. No date means that the class is extracted for the LMS update extract and the date is updated to the run date.

Enrl Ext Dttm (enrollment extract date/time) This field is empty when you first schedule a class, and it automatically populates with a date and time value when you extract membership data. In addition, the LMS extract process uses this field to distinguish between *Snapshot* and *Update* data. Presence of this date means that enrollment data is "ignored" by the extract process if run in update mode, and the record is not new or no changes have taken place to enrollment status, grading basis, or grade. No date means that enrollment data is extracted for the LMS update extract and the date is updated to the run date.

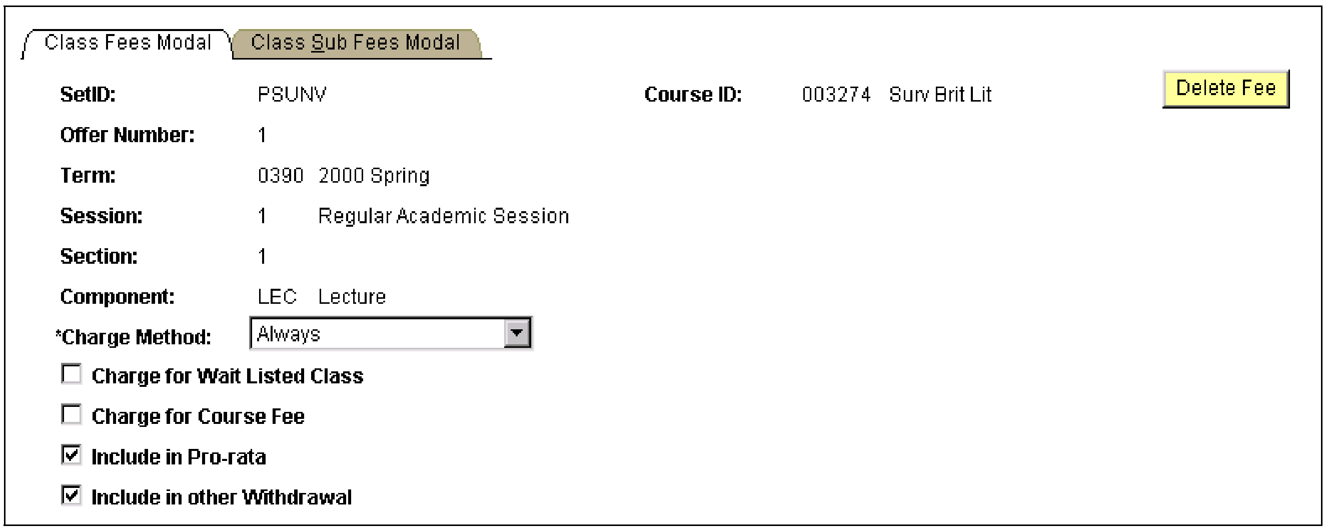
Note. Currently, the system passes all classes individually to the LMS at the component level, including those that comprise a combined section. The system does not generate a combined section group.

Class Attributes

Course Attributes and **Course Attribute Value**	Use the Course Attributes field to link attributes to class sections. The system populates this field and the related course attribute values from the course catalog. You can override or amend these values. Values for course attributes are defined on the Catalog Data page.

Note. Course attributes are used primarily for institutional research and reporting purposes and to print repetitive text in the course catalog and schedule of classes. Course attributes are not used by the Academic Advisement application.

Add Fee	To add a class section fee, you must click the Add Fee button for each new class section.

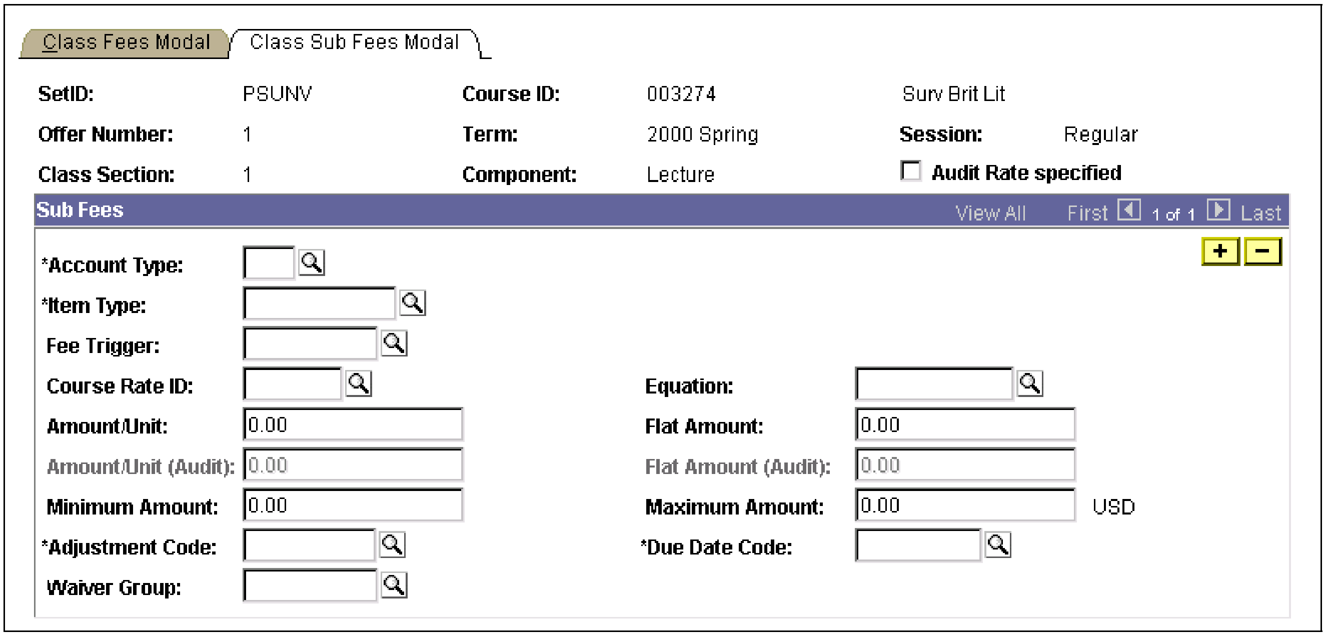


Class Fee Table Modal page (CLASS_FEE_TBL_MDL)

Enter the charge method for the component of the class. These values are set up in Student Financials tables.

The check box options enable you to specify when the system charges fees.

Select the Class Sub Fees Modal tab to specify detail information for the fee:



Class Sub Fees Modal page (CLASS_SUBFEE_MDL)

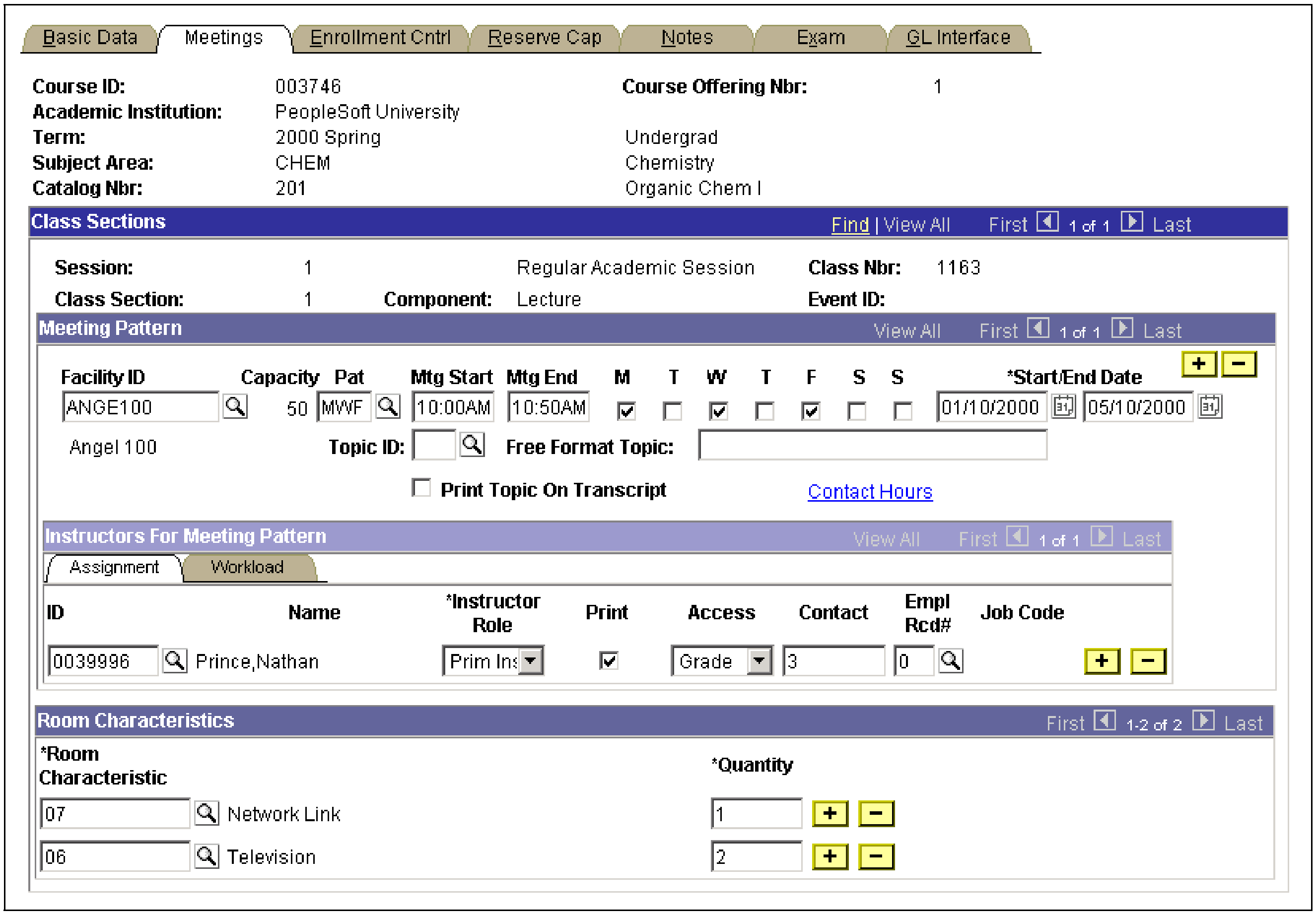
Enter the details of the course fee in this page. You are prompted from tables set up in the Student Financials application.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, “Setting Up Fees and Tuition Groups,” Defining Class Fees

Defining Class Meeting Patterns

Access the Meetings page.



Meetings page

Note. For institutions that schedule large numbers of sections of a class and have facility conflict check activated, use the Schedule Class Meetings component to schedule facility and meeting pattern information. Because the system only performs edit checks on an individual class section (rather than for all the sections of the class), you benefit from faster performance. To use the Schedule Class Meetings component to schedule facility and meeting pattern information, enter all information for the class, except facility and meeting pattern in the Schedule of Classes or Schedule New Course components. Then go to the Schedule Class Meetings component, enter the subject and catalog number for the class, select the first section, and then update the facility/meeting pattern information one section at a time, using the "Next in List" button on the toolbar to scroll through all the sections for the course.

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

Event ID	The system creates a unique Event ID record in the Event table when you schedule a class with a meeting pattern and Facility ID. The Event table is used to record class and non-class events for room scheduling.
Facility ID	Select a facility ID for the class. Facility values are defined on the Facility Table page.

Capacity
The system populates this field by default to the setting on the Facility Table page.

Pat (pattern)
Select the class meeting pattern. Meeting patterns associated with the academic group for the class are available. Meeting pattern values are defined on the Academic Group Table - Standard Meeting Pattern page.

Note. It is important that you enter the most important meeting pattern first. In some places in the system when viewing classes you can only see the meeting pattern which was entered first. Also, the system assigns a final exam code based on the first class meeting pattern.

Mtg Start (meeting start) and **Mtg End** (meeting end)
Enter the class meeting start and end times. The system defaults an end time once you enter a start time, based on the default Normal Class Duration set on the Academic Group table- Standard Meeting Pattern page.

M (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday)
The system populates the meetings days by default based on what you enter in the Pat field.

Start/End Date
For the first meeting, the system populates these fields to the start and end date from the Session table. For all subsequent meetings you add, the system populates this field to the start and end dates on the Basic Data page.

Topic ID
Select a class Topic ID for this class meeting pattern. For example, at PSUNV, ENGLLIT 299 meets on MWF and TTH. The MWF class covers “The Mystery Genre,” while the TTH class covers “British Influence on US Writers.” You can also link class topics to entire classes on the Basic Data page. Topic IDs are defined on the Catalog Data page.

Free Format Topic
Enter a free format topic if a predefined topic ID does not suit your purposes. For example, if a professor wants to teach ENGLLIT 299 as “19^{th} Century Novelists,” but the topic had not been set up as a Topic ID, you could enter it as a Free Format Topic. You can only link free format topics to class meeting patterns.

Note. You can not assign class meeting pattern topic IDs to combined sections. This would cause data integrity problems. For this reason, once sections are combined, the system makes the Topic ID field unavailable on the Meetings page. Instead, only assign free format topics to combined sections.

In addition, if you combine sections that already have class meeting pattern topic IDs assigned to them, the system deletes the topic IDs.

See Chapter 17, “Managing the Schedule of Classes,” Creating Combined Sections, page 396.

Print Topic On Transcript
Select this check box for the system to print the class meeting pattern topic, along with the class name, on transcripts.

See Chapter 13, “Setting Up Transcripts,” Designating Enrollment and Statistics Data, page 276.

Note. For the topic to print on the transcript, you must also select the Print Course Topic check box on the Transcript Type - Enrollment/Statistics page.

Contact Hours link Click the to access the Instructor Contact Hours page, where you can review total course contact hours, weeks of instruction, and other contact hours information.

Course Contact Hours Derived from the course catalog.

Weeks of Instruction Derived from the Session Table.

Total Equals the course contact hours multiplied by the weeks of instruction.

Total Course Contact Hours (Actual) Calculated from the class meeting pattern. Equals the sum of the end time minus the start time for every meeting date, excluding holidays. The system only calculates this value for the graded component if a facility is booked for the class.

Combined Section link Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. Once you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Assignments Tab

See the Meetings page exhibit for a view of this tab.

ID Select the ID of the instructor for the course. The system prompts you from the Personal Data view or one of seven Instructor/Advisor views. The prompt values depend on:

- The Edit Instructor Against option and the Assign Instructor By check box that your institution selects on the Academic Organization Table page for the academic organization to which this class belongs.
- The Edit Instructor Against option and the Assign Instructor By check box that your institution selects on the Academic Organization Table page for the academic organization to which this class belongs.

You can associate one or more instructors with each meeting pattern. The system carries forward the instructor ID from the previous meeting pattern when you add a new meeting pattern. Override the instructor ID if necessary.

Note. In order to accommodate the Instructor Workload feature, a single instructor may be assigned to more than one row, although this may not be common practice. For example, you may want to assign Instructor A to teach 50 percent load factor with an assignment type of "Internet," and another 50 percent load factor with an assignment type of "In Class Lecture."

See Chapter 18, "Tracking Instructor Workload," page 425.

Instructor Role

Select the instructor role for the corresponding ID number. Values for this field are delivered with your system as translate values. You can modify these values. Insert rows to add multiple instructors and their corresponding instructor roles.

Note. For Independent Study courses for which the student can select one of several instructors, assign multiple instructors the *Primary* instructor role. Provided that you have selected an Instructor Edit field value of Class Instructor Edit on the Class Associations page, only the primary instructors defined for the class on the Meetings page display on the Enrollment Request page during enrollment.

Print

Select to display the instructor's name on the Schedule of Classes report. The system populates this check box by default to the setting on the Course Catalog - Offerings page.

Access

Select the grade roster access for this instructor. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. The values work in hierarchical fashion:

Approve: Instructor can enter grades and approve the grade roster.

Grade: Instructor can only enter grades for the class.

Post: Instructor can enter grades, approve the roster, and post the grades.

Contact

The values you enter in this field have no impact elsewhere in the system. The Contact field on this page has no programming tied to it, and does not relate to the delivered Instructor Workload feature in any way.

Empl Rcd# (employee record number)

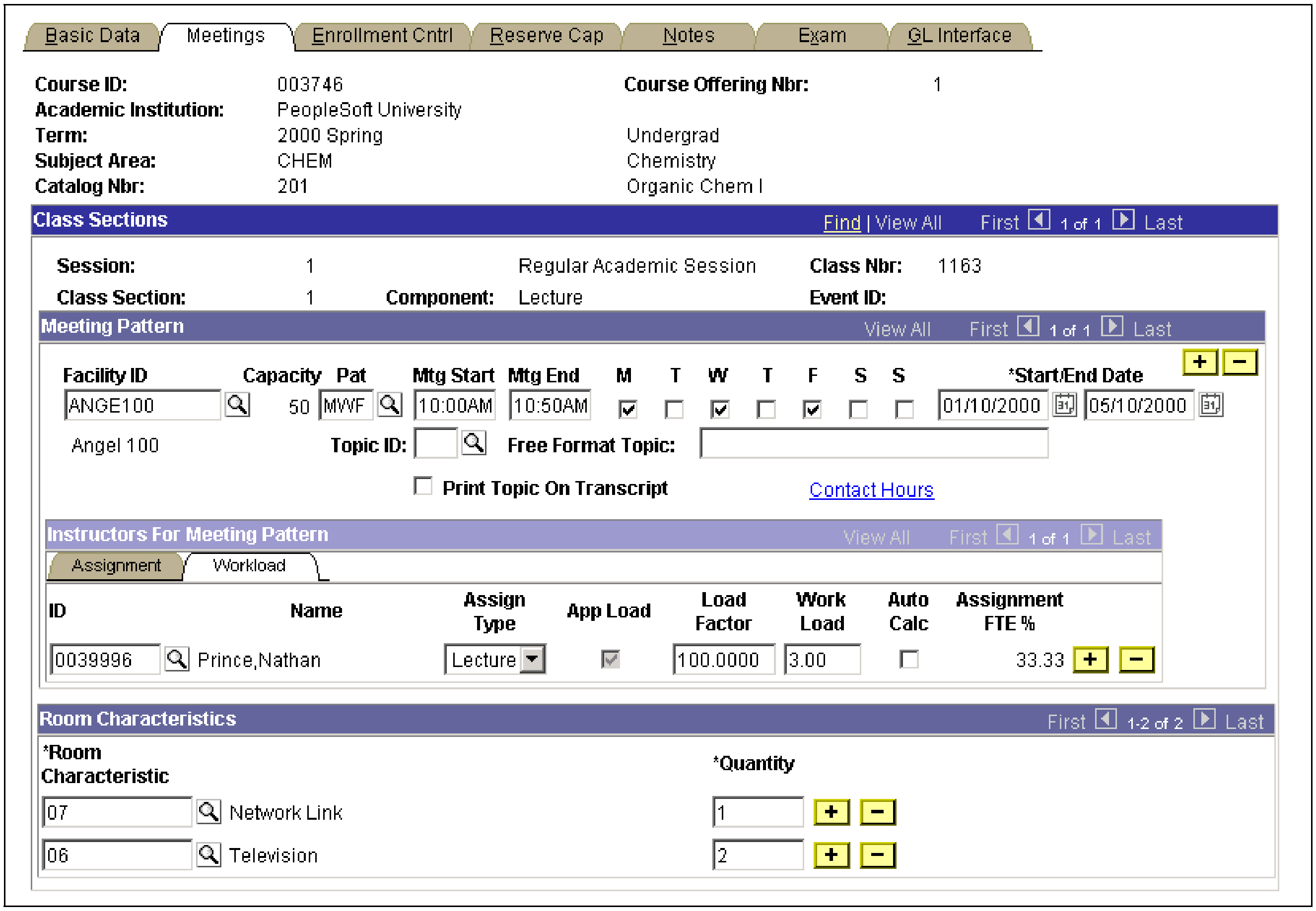
Relates job information to instructors for reporting purposes. In addition, the system displays a warning message if the FULL_PART_TIME value on the job does not coincide with the same field value on the instructor assignment class record related to the instructor assignment class on the Term Workload page.

Job Code

Displays the value specified on the Accommodations page for a particular employee record.

Workload Tab

Select the Workload tab.



Schedule of Classes - Meetings page: Workload tab

Assign Type (assignment type)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. The system populates the field by default from the Academic Institution 4 page and can be overridden. Only those assignment types current as of the term begin date and with the View on Schedule of Classes check box selected are available.

App Load (apply load)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. The check box indicates whether the assignment counts toward an individual's Total Term FTE %. The field corresponds to the Include Assignment in Workload check box on the Assignment Type page and can not be overridden. The only way to change the setting of this check box is to select a different assignment type.

Load Factor

If desired, you can use this field to divide one course component into multiple assignments across instructors. Inserting multiple rows per course component and assigning each one a load factor (percent) enables you to divide a component into different assignment types among instructors. For example, you can assign instructor A to teach 30 percent of the lecture component, and instructor B to teach 70 percent of the lecture component. It is your responsibility to set the load factor. The total load factor on one course component should equal 100 percent. The system displays a soft warning message if the total does not equal 100 percent.

Work Load

In order to provide maximum ease in assigning workload hours to individuals, the system auto calculates default workload hours when you schedule classes. The system bases calculations on the academic progress units or course component workload hours for the class (set up on the class association and class component pages), multipliers both per subject/component and per instructor, and load factor. The Work Load field stores the resultant workload hours.

Manual modifications to work load hours are enabled and effect the Assigned FTE%.

See Chapter 6, "Setting Up Instructor Workload," Course Component Workload Hours Formula, page 139.

Auto Calc (automatic calculation)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. Select this check box if you want to have the workload value recalculated any time the user manually updates assignment type or load factor. The default is selected.

Note. Manually entering a value in the Work Load field clears the Auto Calc check box so that the manual entry is not overridden automatically if you change the assignment type or load factor. You can select the Auto Calc check box again; however, doing so recalculates workload.

Assignment FTE% (assignment full time equivalency percentage)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. This value represents the particular assignment's weight based on the 100% weekly workload hours or the 100% OEE workload hours for the assignment type. For example, if assignment type "lecture" has 100% Weekly Workload Hours set to 15, and you assign an instructor to teach a 3 hour lecture component with an assignment type of "lecture," the Assignment FTE % is 20 (because 3 hours out of 15 makes 20%).

It is calculated and can not be modified by the user.

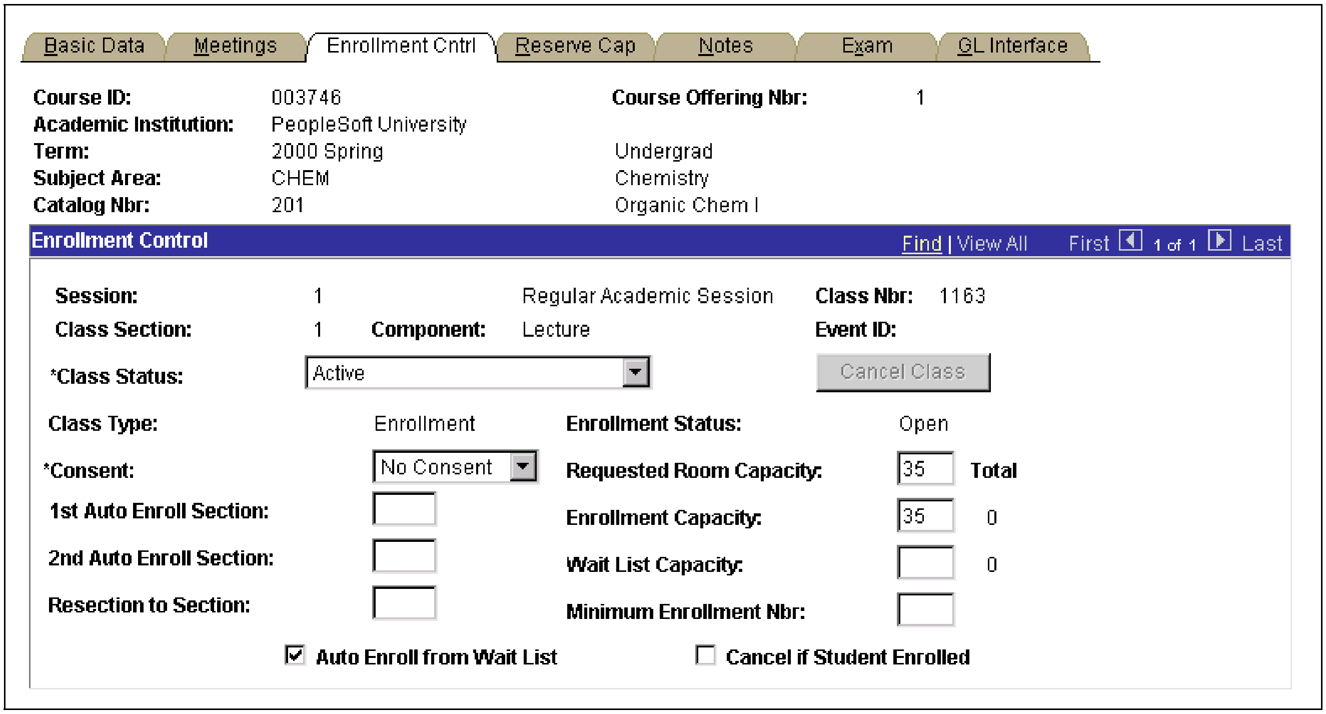
Room Characteristics

Room Characteristic and **Quantity**

Use the Room Characteristic field to link room characteristics to classes. The system populates the Room Characteristic field and the Quantity field from the Course Catalog - Components page. You can override these values. The Room Characteristic field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum quantity of room characteristics for Schedule25 is 96. Therefore, be sure that you select values between 01 and 96.

Defining Auto Enroll Options and Capacity

Access the Enrollment Cntrl page.



Enrollment Cntrl page

Class Status

The system populates this field to *Active* by default. Class status values are delivered with your system as translate values. You can override the status to indicate *Stop Further Enrollment, Cancelled Section,* or *Tentative Section.* The Schedule of Classes report enables you to select on class status, so that you can print only *Active* classes, or only *Inactive* classes, and so on.

Note. The Class Status of *Active* has coding attached to it and should not be deleted from the translate table. You can add as many new Class Status values to the translate table as you want, but they will not have coding attached to them.

Cancel Class

Click to cancel the class in view. The class status must be *Canceled Section.* The button processes one section cancellation at a time. If you want to cancel multiple sections, you must post your request for each section that you want to cancel.

Warning! If you want to cancel the section regardless whether students are enrolled, you must select the Cancel if Student Enrolled check box. Doing so, however, drops any students who are enrolled in the section and requires that you recalculate tuition for those students.

Consent

The system populates this field by default from the Catalog Data page indicating the type of consent (if any) required for students to enroll in the class. You can override the value.

If you select *Instructor* or *Departmental*, consent is granted either by entering the permission number or using the Override Permissions check box on the Enrollment Request page.

Select the Student Specific Permissions check box on the Basic Data page to be able to specify permission by student ID on the Class Permission Numbers page.

Auto Enroll from Wait List This check box is unavailable for open entry - open exit (OEE) classes (classes tied to an OEE session). Select to enable the COBOL/SQL Wait List process (SRCPWAIT) to move students from the wait list to enrolled status when a space opens up in the section. Spaces become available through enrollment drops or an enrollment capacity increase. Generally, when spaces become available in a section, the class status opens, allowing students to enroll. However, selecting this check box keeps the status closed so that you have time to move students from the wait list into the class by running the waitlist process (before other students enroll).

If you do not select the Auto Enroll from Wait List check box and you have students on the wait list for the class, when the class status changes to open you cannot use the wait list process to move students from the wait list into the class.

You have to move wait listed students into the class manually, and students that are not on the wait list will be able to enroll in the class.

See Chapter 26, “Using Enrollment Related Processes,” Moving Students From the Wait Lists to Enrollment, page 582.

Note. “Enrollment” sections can only auto-enroll “non-enrollment” sections.

1st Auto Enroll Section and **2nd Auto Enroll Section** Enter a section within the same associated class number in which the system should automatically enroll students into the 1st Auto Enroll Section and 2nd Auto Enroll section. The auto enroll section must have a different component from the parent section.

Resection to Section Enter the alternative section in which the system automatically enrolls a student if the primary section is full.

The component of the primary section and the resection to section class must be the same. For instance, when Section 1 Lecture is filled, the system enrolls students in Section 3 Lecture.

Cancel if Student Enrolled Select for the system to process a request for a canceled class section regardless of whether students have already enrolled in the section. If you do not select this check box and you attempt to cancel a section in which students have enrolled, the system prevents you from posting the change, keeping the class status active. Thus, by leaving the box cleared you prevent inadvertently canceling a section in which students are enrolled.

Requested Room Capacity Enter the requested room capacity for the class. Your room capacity can be different than your enrollment capacity. Because the system stores two separate capacity values, this field enables you to manipulate the enrollment capacity without affecting room scheduling. The system populates the Requested Room Capacity field by default from the default section size on the Course Catalog - Components page. This field is useful for you especially if you use Universal Algorithm’s Schedule25 software.

For more information about the interface between Universal Algorithm's Schedule25 software and PeopleSoft Student Administration, see your Schedule25 documentation.

Enrollment Capacity
The system populates the enrollment capacity by default from the default section size on the Course Catalog - Components page.

Wait List Capacity
Enter the wait list capacity for the section to indicate the maximum number of students you want to allow to wait list for the class.

Minimum Enrollment Nbr (minimum enrollment number)
Enter the minimum enrollment number in order for the section to be offered. If the minimum enrollment number is not realized you might decide to cancel the section. This field is for informational purposes only.

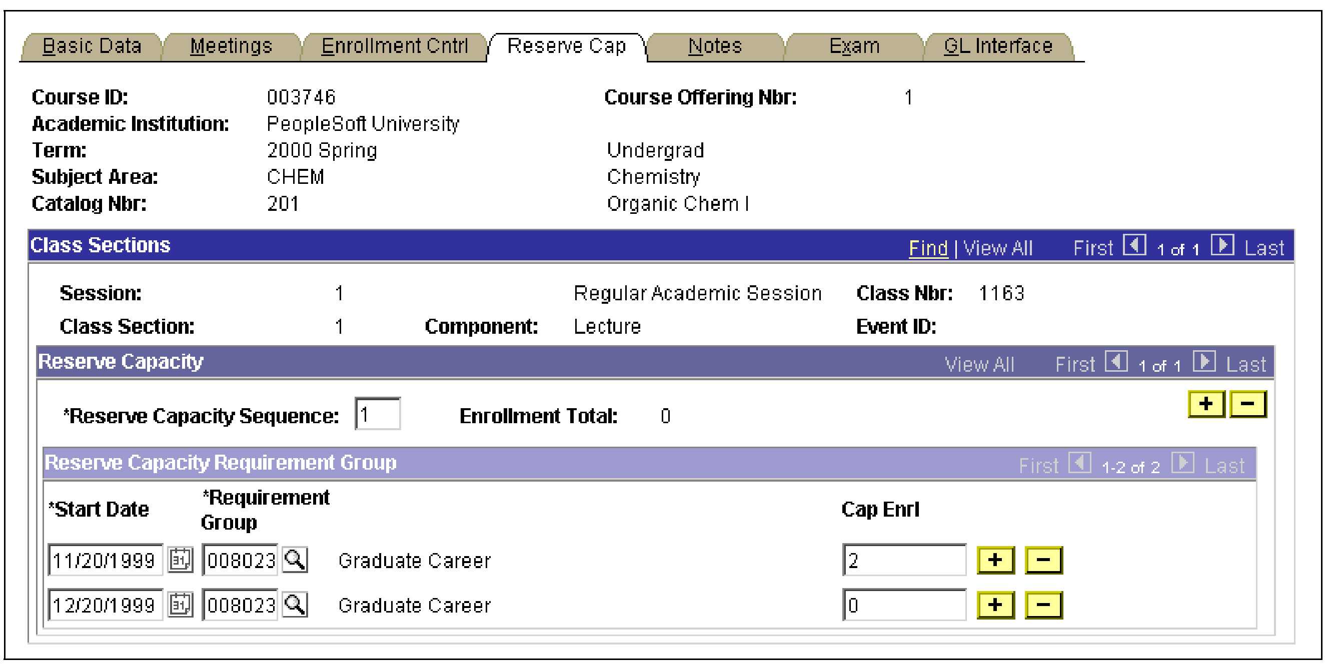
Total
The system displays the current total of students enrolled and on the wait list for the section.

Combined Section link
Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. Once you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Defining Class Reserve Capacity

Access the Reserve Cap page.



Reserve Cap page

Reserve Capacity Sequence The system creates the reserve capacity sequence number indicating the order in which it evaluates the sets of requirement groups during enrollment. You can change this number. If you want to set up more than one requirement group for more than one start date, you must set up each one under its own sequence number. This is important to note because the system does not combine total cap enrollment values within the same Reserve Capacity Sequence. Instead, the system selects and uses only one requirement group per reserve capacity sequence — the one that has the most current effective date.

Enrollment Total The total number of students enrolled as part of the reserve capacity sequence.

Start Date and **Requirement Group** Enter the effective date for your reserve capacity. This date determines when the enrollment capacity requirement group becomes active. If you enter a subsequent row within the same reserve capacity sequence number, the system will reference the row with the current effective date and this row will override all others within the sequence.

Select the requirement group for the reserve capacity. Values for requirement groups are defined through the Enrollment Requirement Group component. Students who attempt to enroll in the class and who satisfy the reserve capacity requirement group that you specify will be permitted to enroll in the class up to the Cap Enrl value, (so long as the enrollment does not exceed the total enrollment capacity that you specify on the Enrollment Control page).

In order to set various enrollment capacities, or to discontinue the reserve capacity as of a certain date, you can add rows for the same requirement group with a later effective date. For example, if you want to change a reserve capacity for a class on a specific date, you can add a second row to the sequence with a Start Date value equal to the expiration date, and enter a new enrollment capacity for the row.

You can also use this method to *expire* reserve capacities (instead of deleting the reserve capacity sequence and losing your historical data). Under the same reserve capacity sequence, simply insert a new effective-dated row with the date that you want the reserve capacity to expire, then enter the same requirement group number and set the enrollment capacity to *0.*

Warning! If you expire (set to *O)* the Cap Enrl field value for any reserve capacity sequence row within the section, the system inactivates all reserve capacity sequence values for the section.

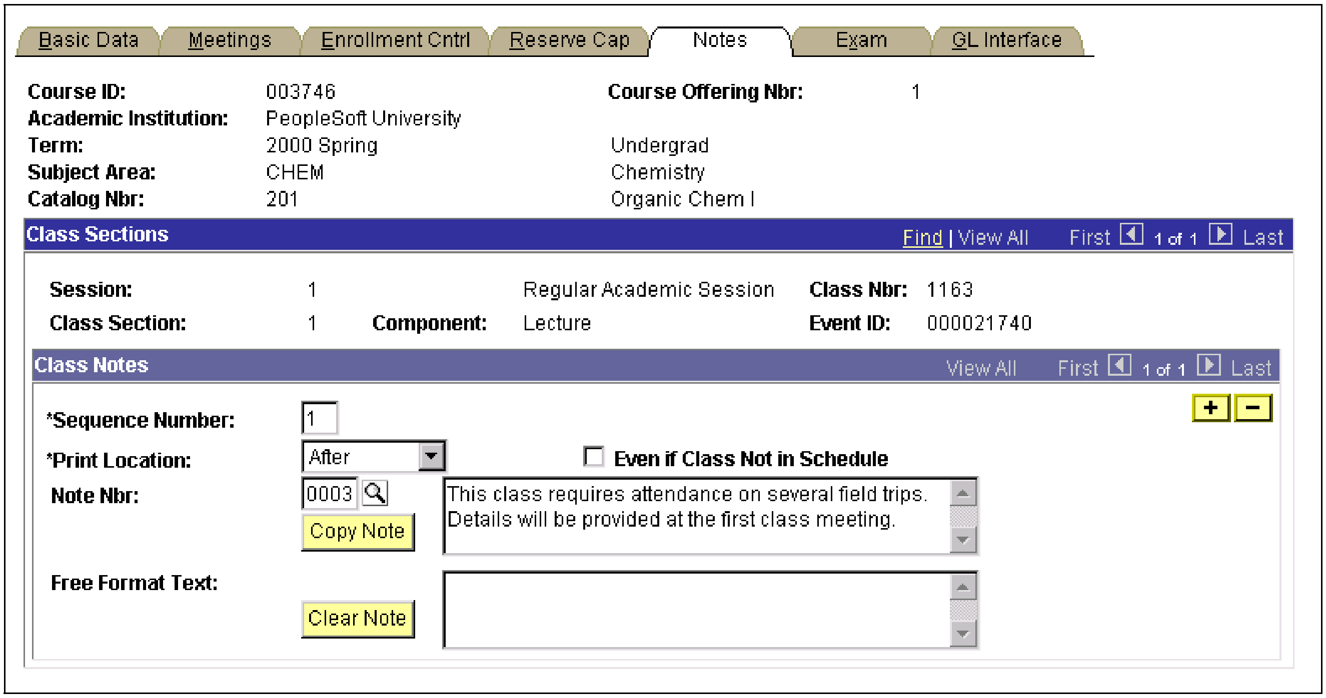
Cap Enrl (capacity enrollment) The maximum number of seats that you want to reserve for students who satisfy the requirement group parameters. The system does not combine this value with other capacity enrollment values within the same sequence number. The system only combines the most current row for each reserve capacity sequence.

See Also

Chapter 5, "Setting Up Enrollment Requisites," page 99

Linking Class Notes to Sections

Access the Notes page.



Notes page

Sequence Number The system creates a class notes sequence number. The number determines the display order of the class notes for a section if there are multiple notes. You can override this number.

Print Location Select the print location of the note, either *Before* the class listing, or *After* it.

Even if Class Not in Schedule This check box has no programming tied to it.

Note Number Select a note number to reference a preexisting note. The note's description appears adjacent to the note number. Note number values are defined on the Class Notes Table page.

Free Format Text Enter a free format text note.

Copy Note Click to copy the note number text to the free format text. The note can then be modified to accommodate the class section. This eliminates the note number and note text.

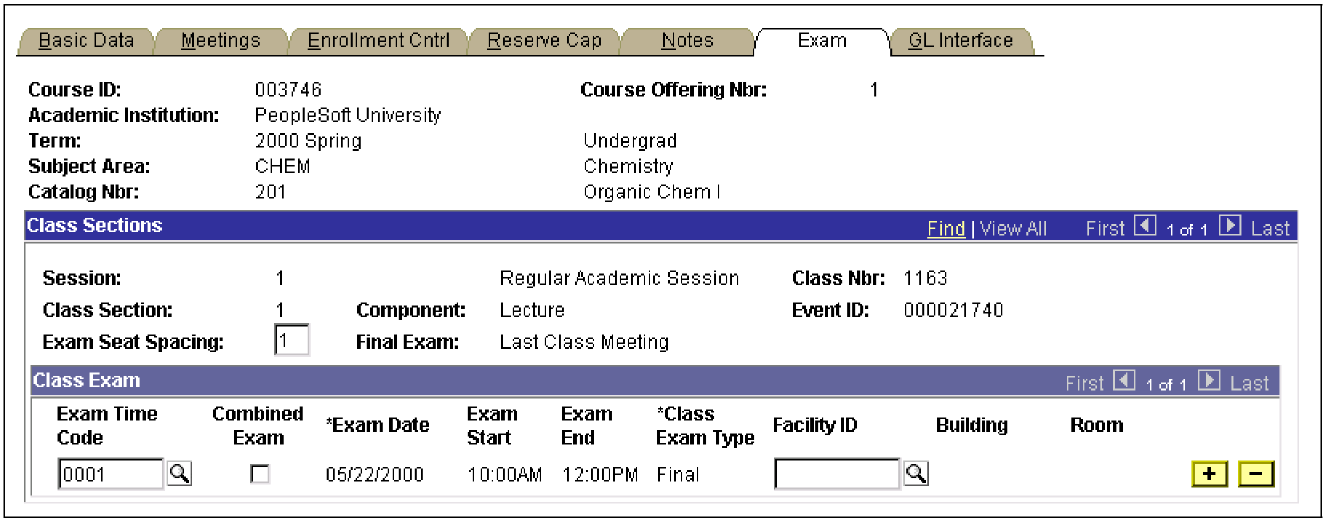
Clear Note Click to clear the free format text.

See Also

Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Defining Class Notes, page 10

Linking Exam Times to Classes

Access the Exam page.



Exam page

Exam Seat Spacing

If you indicate that a final exam will occur on the Course Catalog - Components page, the system populates the Exam Seat Spacing field by default from that page. It indicates the number of seats between students during the final exam and is for informational purposes only. You can override this number.

Exam Time Code

By entering a predefined exam time code, you save yourself some data entry time for the exam date, time, and facility values. Exam time values are defined on the Exam Code Table page.

Combined Exam

Select to indicate that this exam can share a facility with another exam.

Note. Time and facility conflicts with other events, such as regular class meetings, are not permitted—the system performs conflict checking for these.

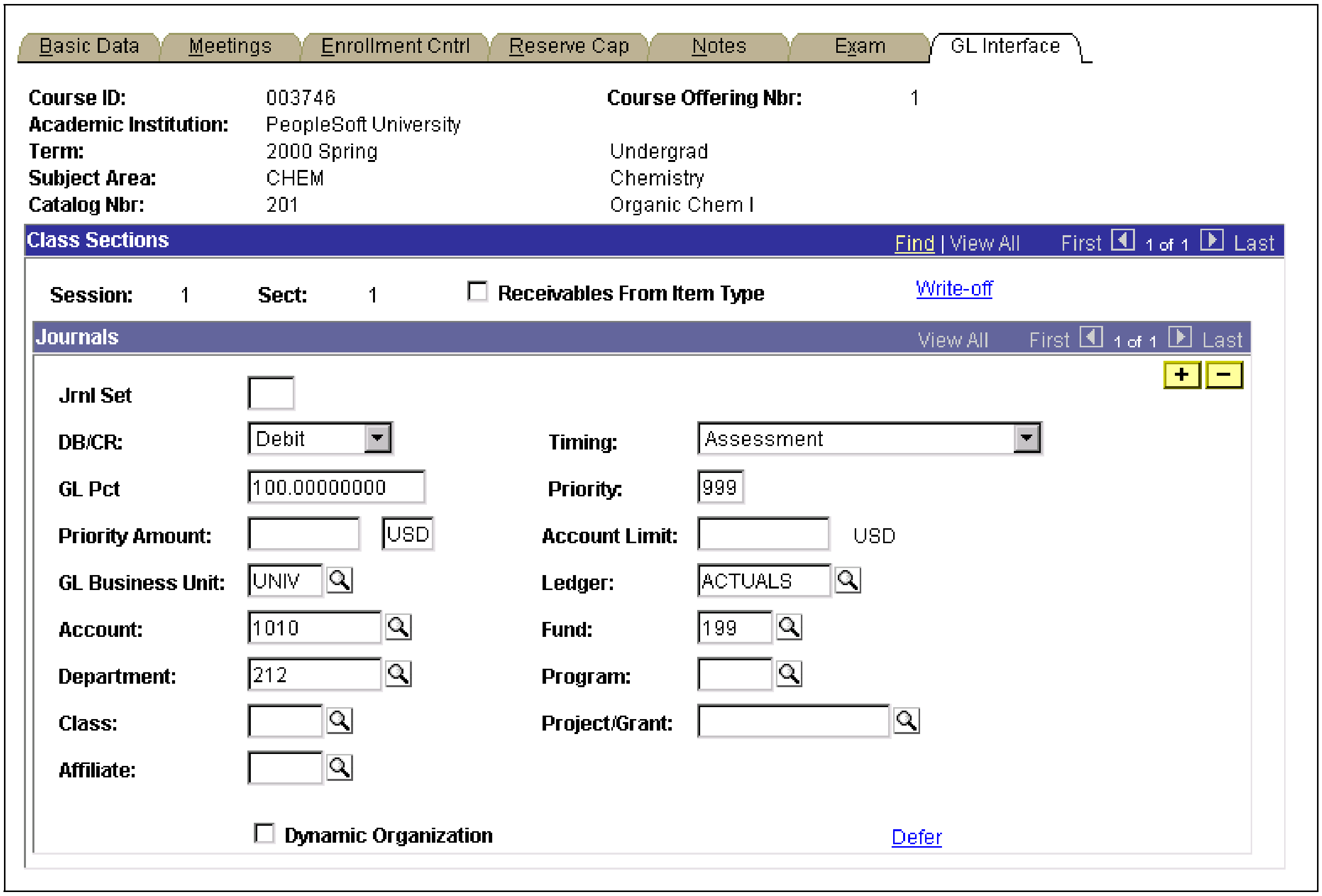
If you do not select the Combined Exam check box, the system verifies that there are no conflicts in room and time period scheduling. The stated room and time period is used for only one class exam.

Exam Date, Exam Start, Exam End, Class Exam Type, and **Facility ID**

If you do not select an Exam Time Code, you can enter an Exam Date, Exam Start, Exam End, Class Exam Type, and Facility ID field value. The system performs facility conflict checking when you save the page.

Interfacing Class Sections with the General Ledger

Access the GL Interface page.



GL Interface page

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, “Using GL Interface Processing”

Modifying Scheduled Classes

Use the Schedule of Classes component when you want to modify or maintain data for classes that have been scheduled. The functionality of the pages in this component are identical to the Schedule New Course component, but the view of classes offered to you is limited to scheduled classes only.

For institutions that schedule large numbers of sections of a class and have facility conflict check activated, use the Schedule Class Meetings component to edit facility and meeting pattern information for scheduled classes. Because the system only performs edit checks on an individual class section (rather than for all the sections of the class), you benefit from faster performance.

Note. To use the Schedule Class Meetings component to schedule facility and meeting pattern information, enter all information for the class, except facility and meeting pattern in the Schedule of Classes or Schedule New Course components. Then go to the Schedule Class Meetings component, enter the subject and catalog number for the class, select the first section, and update the facility/meeting pattern information one section at a time, using the “Next in List” button on the toolbar to scroll through all the sections for the course.

Modifying Scheduled Class Meetings

This section provides an overview of the Schedule Class Meetings component, and discusses how to:

- Update class meeting information.
- Update enrollment control information.
- Update exam information.

Understanding Modifications to Scheduled Class Meetings

Use the Schedule Class Meetings component when you want to modify or maintain data for an individual class section that has been scheduled. This component contains three pages—the Meetings page, the Enrollment Cntrl (enrollment control) page, and the Exam page. These pages are the same as those in the Schedule New Course and Schedule of Classes component.

For example, if you have a course that has twenty scheduled sections for a term and you want to make changes to only two of those twenty sections, you can use the Schedule Class Meetings component to make the necessary changes to each of those two sections individually. Since the system only has to run edit checks on the individual class section rather than all twenty class sections, you benefit from the system's faster performance.

Here's how to modify a scheduled class meeting:

1. Update meeting times, facility reservations, and instructor assignments on the Schedule Class Meetings − Meetings page.
2. Update class size, wait list limits, class status and consent on the Schedule Class Meetings − Enrollment Cntrl (enrollment control) page.
3. Link exams and edit exam facility information on the Schedule Class Meetings − Exam page.

Pages Used to Modify Class Meeting Information

Page Name	Object Name	Navigation	Usage
Schedule Class Meetings − Meetings	CLASS_MTG_PATTERN	Manage Student Records, Establish Courses, Use, Schedule of Classes, Meetings	Update meeting times, facilities, and instructors for one class section at a time
Schedule Class Meetings - Enrollment Cntrl (schedule class meetings — enrollment control)	CLASS_ENRL_CNTL	Manage Student Records, Establish Courses, Use, Schedule of Classes, Reserve Cap	Update class status values
Schedule Class Meetings - Exam	CLASS_EXAM	Manage Student Records, Establish Courses, Use, Schedule of Classes, Exam	Link exams to one class section at a time and to edit facility information.

Entering Meetings Information

Use the Schedule Class Meetings − Meetings page to update meeting times, facilities, and instructors for one class section at a time.

See Also

Chapter 17, “Managing the Schedule of Classes,” Defining Class Meeting Patterns, page 361

Entering Enrollment Control Information

Use the Schedule Class Meetings - Enrollment Cntrl page to easily update class status values. In particular, when you need to cancel a class that has multiple sections, doing so through this component (as opposed to canceling the section via the Schedule of Classes component) proves most efficient. Most fields on this page are display only because the primary purpose for accessing this class meeting is to update the class status value.

See Also

Chapter 17, “Managing the Schedule of Classes,” Defining Auto Enroll Options and Capacity, page 367

Entering Exam Information

Use the Schedule Class Meetings - Exam page to link exams to one class section at a time and to edit facility information.

See Also

Chapter 17, “Managing the Schedule of Classes,” Linking Exam Times to Classes, page 373

Viewing and Updating Class Sections

Here’s how to review or update a class section:

1. Access the Class Sections page.
2. Modify data for the specific class sections that you want to update.

Prerequisite

You must first schedule the class.

See Also

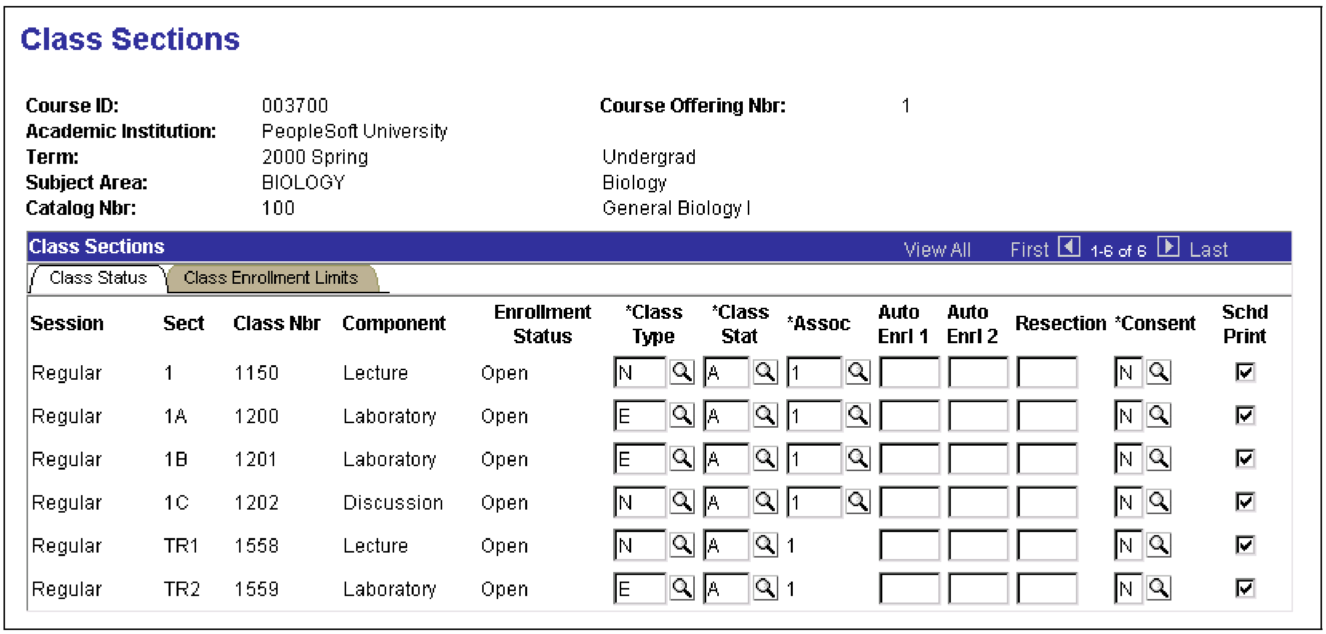
Chapter 17, “Managing the Schedule of Classes,” Scheduling New Classes, page 351

Pages Used to View and Update Class Sections

Page Name	Object Name	Navigation	Usage
Class Sections	CLASS_CONTROL	Manage Student Records, Establish Courses, Use, Class Sections, Class Sections	Review or modify a snapshot summary of section information for a class. The page displays one row for each section scheduled for a course offering during a term.

Reviewing Class Sections

Access the Class Sections page.



Class Sections page

Note. Multiple views of this page are available by clicking the tabs in the scroll area.

Class Status Tab

Class Type

The class type of *E* (enrollment) indicates which section is the primary section at enrollment time. The class type of *N* (non-enrollment) is used to indicate that the section choice is the student’s secondary enrollment option, or that the section is used in auto-enrollment. Within a class, only one component can possess the class type of *E.*

Class Stat (class status)

The system populates the Class Stat field to *A* (active) by default. Class status values are delivered with your system as translate values. You can override the status to indicate *Stop Further Enrollment, Cancelled Section,* or *Tentative Section.* The Schedule of Classes report enables you to select on class status, so that you can print only *Active* classes, or only *Inactive* classes, and so on.

Note. The class status of *Active* has coding attached to it and should not be deleted from the translate table. You can add as many new class status values to the translate table as you want, but these will not have coding attached to them.

Assoc (associated class number)
The system displays the associated class number. You can edit this field if no students have yet enrolled in the section.

Auto Enrl 1 (auto enroll 1)
For classes that have associated auto enroll sections, you can view or edit the first auto enroll section.

Auto Enrl 2 (auto enroll 2)
For classes that have associated auto enroll sections, you can view or edit the second auto enroll section.

Resection
Enter the alternative section in which the system automatically enrolls a student if the primary section is full.

The component of the primary section and the resection to section class must be the same. For instance, when Section 1 Lecture is filled, the system enrolls students in Section 3 Lecture.

Consent
The system populates this field by default from the Enrollment Cntrl page indicating the type of consent required for students to enroll in the class. You can change the value.

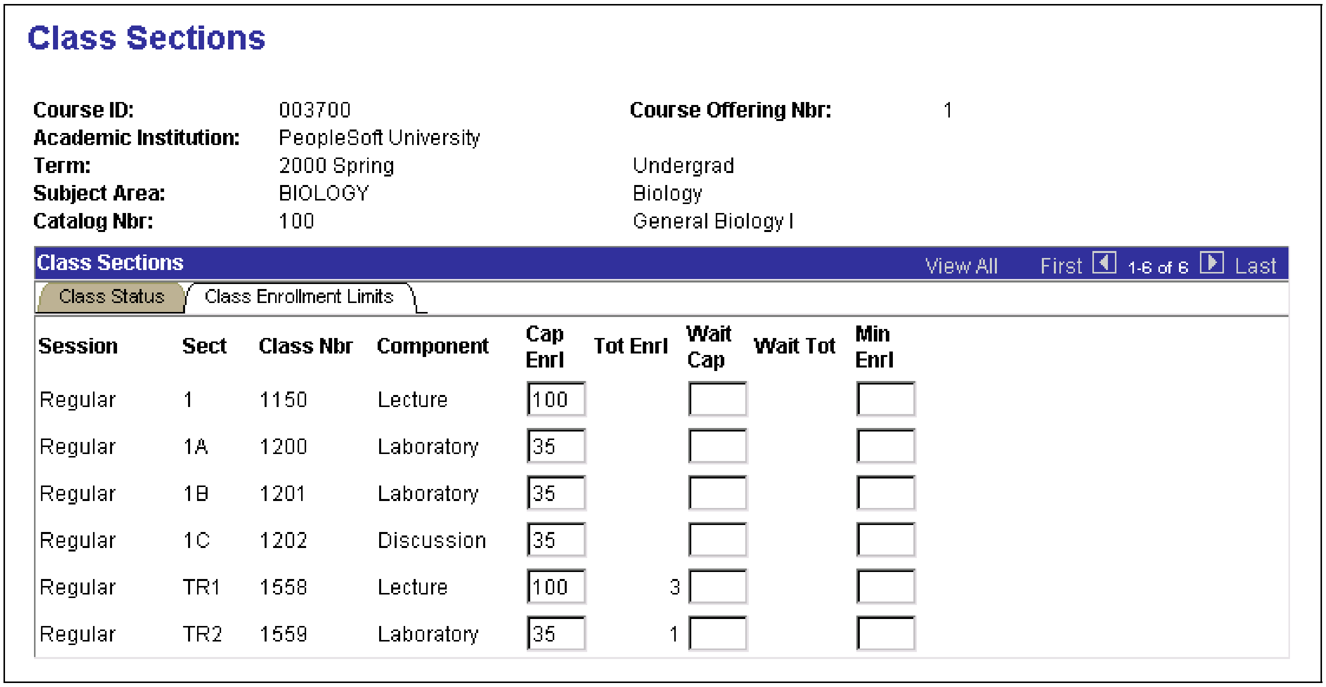
If you select *Instructor* or *Departmental*, consent is granted either by entering the permission number or by using the Override Permissions check box on the Enrollment Request page. If you select *None,* no special consent is required.

Schd Print (schedule print)
The system populates this check box by default from the Schedule Print check box on the Basic Data page. Select this check box to display the class in the schedule of classes. If you clear this check box, the section does not display in the Schedule of Classes - Class Search function if accessed through either the Community Access or Learner Services collaborative applications. Similarly, if you clear this check box, students using the self-service enrollment feature through the Learner Services collaborative application do not see this class in their class search results. They can enroll in the class, but only if they enter the exact class number (without using the class search feature).

Note. Section numbering is important because the system sorts by section number on this page and in the schedule of classes report.

Class Enrollment Limits Tab

Access the Class Enrollment Limits tab.



Class Sections

Course ID: 003700 **Course Offering Nbr:** 1
Academic Institution: PeopleSoft University
Term: 2000 Spring Undergrad
Subject Area: BIOLOGY Biology
Catalog Nbr: 100 General Biology I

Class Sections View All First 1-6 of 6 Last

Class Status | Class Enrollment Limits

Session	Sect	Class Nbr	Component	Cap Enrl	Tot Enrl	Wait Cap	Wait Tot	Min Enrl
Regular	1	1150	Lecture	100				
Regular	1A	1200	Laboratory	35				
Regular	1B	1201	Laboratory	35				
Regular	1C	1202	Discussion	35				
Regular	TR1	1558	Lecture	100	3			
Regular	TR2	1559	Laboratory	35	1			

Class Sections page– Class Enrollment Limits tab

Use the Class Enrollment Limits tab to view summary enrollment information for a class. The page displays one row for each section scheduled for a course offering.

Cap Enrol (capacity enrollment) The system populates this field by default to the Enrollment Capacity field on the Enrollment Cntrl page.

Tot Enrl (total enrollment) The system displays the current total of students enrolled in the class section.

Wait Cap (wait list capacity) The system displays the current total of students wait listed for the class section.

Wait Tot (wait list total) The system populates this field by default to the Wait List Total as displayed on the Enrollment Cntrl page.

Min Enrl (minimum enrollment) The system populates this field by default to the Minimum Enrollment Nbr field the Enrollment Cntrl page.

Combined Section link Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. Once you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Rolling Data from the Course Catalog to the Schedule of Classes

Update the schedule of classes with changes you have made to a course offering in the course catalog after you have scheduled a class or enrolled students.

Here's how to copy data from the course catalog to the schedule of classes:

1. Access the Course Roll page and specify the course offering that has recent changes.
2. Compare the information on the top of the page with the information for each section.
3. If the information differs, click the Course Roll button to copy the catalog information down to the individual class sections.

Prerequisite

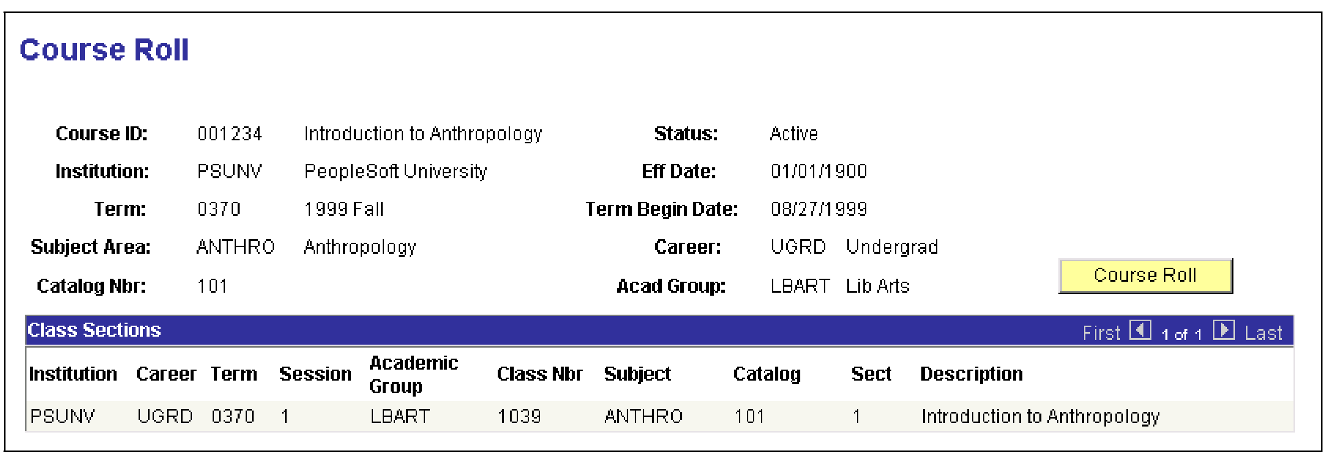
You must first create your catalog and schedule of classes.

Pages Used to Roll Data from the Course Catalog to the Schedule of Classes

Page Name	Object Name	Navigation	Usage
Course Roll	CRSE_ROLL	Manage Student Records, Establish Courses, Use, Course Roll, Course Roll	Upon entering the page, the system prompts you to select a course offering from a list of courses already in the schedule of classes for a given term and session.

Running the Course Roll Process

Access the Course Roll page.



Course Roll page

The system displays the course offering information for the term and session in the upper portion of the page, and displays all of the related class sections that have been scheduled for that term and session of the course on each detail line in the Class Sections area.

On the lower portion of the page, compare the Institution, Career, Term, Session, Academic Group, Class Nbr (class number), Subject, Catalog, Sect (section), and Description (course title) values for the scheduled class sections with the values for the related course catalog offering (on the upper part of the page).

If these values are different, click the Course Roll button to synchronize the scheduled class sections with the latest course catalog offering information. The system rolls the course catalog data down to the schedule of classes for each class section that is scheduled for the course during the term and session you specify. The system processes the request and immediately displays the *prospective* changes to the schedule of classes results in the Class Sections area. This is your opportunity to review the results of the roll process. If you are not satisfied with the results, do not save the page. Simply exit the page, and no update to the schedule of classes occurs. On the other hand, if you are satisfied with the results of the roll process, save the page to confirm and update the schedule of classes.

Note. On the Course Catalog - Offerings page, if you have changed the institution where the course is scheduled and there are students already enrolled in the class sections, the system does not process the rolling of the data to the schedule of classes for those class sections.

See Also

Chapter 4, "Setting Up the Course Catalog," Creating Course Offerings, page 66

Defining Class Associations

This section provides an overview of class associations, and discusses how to:

- Adjust units.
- Modify class components.
- Modify requisites.

Understanding Class Associations

Class association numbers link all class sections that constitute a single offering. With a common association number, you can not only control the sections of classes in which a student must enroll, but you can also control elements of the sections including units, components, and requisites.

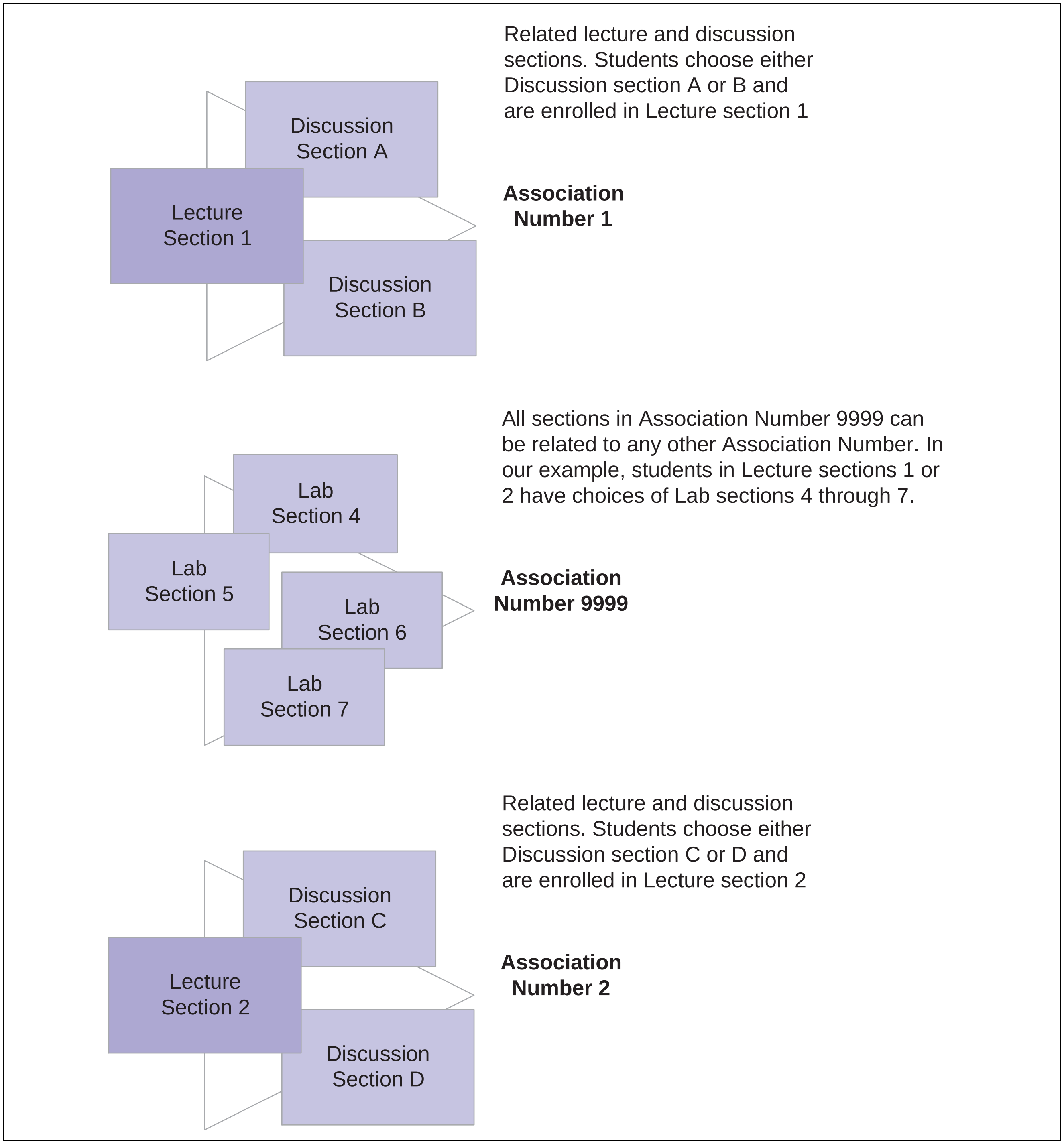
Use the class associations component when you have scheduled classes and an administrative or academic change dictates that you must add or modify class components, or adjust units within associated sections.

Regardless of how many components a course offering has (lecture, lab, discussion), always use a unique class association number to identify it. This also holds true for offerings that have just a single component, such as a lecture. Then each section is in its own group, this permits a student to be enrolled in one section and on the wait list for a second more desirable section.

In addition, assigning a unique class association number enables you to vary the units, requisites, and components of individual sections when you have a single component course.

Warning! If you do not indicate a unique association number for each section of a single component course, students can not wait list for multiple sections.

A visual representation of the class association concept might look like the following diagram. The course has two lecture sections, four discussion sections, and four lab sections. Student in lecture section *1* can only be in discussion sections *A* or *B,* and students in lecture section *2* can only be in discussion sections *C* or *D.* All students must enroll in a lab section, but can choose any lab section.



Viewing the Class Association Number Concept

Discussion sections *A, B, C* or *D* are set up with a class type of *Enrollment* in the Schedule of Classes. Students select to enroll in one of these sections. Lecture sections are set up with a class type of *Non-Enrollment* and the auto-enroll option selected. Students are automatically enrolled in a lecture section dependent upon the discussion section chosen. Lab sections are set up with association number *9999* because students have an option of enrolling in any of these.

Use the class associations component once you have scheduled your classes for a term. In this component you can maintain the data of a group of classes which form a single course offering.

The data in the class associations component is created after you schedule classes. Use this component only if you want to override defaults that are set in the course catalog.

Note. Once you create the schedule of classes, if you amend the course catalog those changes are not reflected in the schedule of classes. Use the Class Associations component if you must make changes to classes already scheduled, such as adjusting units, modifying components, or modifying requisites. You can also use the Course Roll page to make changes to classes that are already scheduled.

See Also

Chapter 17, "Managing the Schedule of Classes," Rolling Data from the Course Catalog to the Schedule of Classes, page 380

Prerequisite

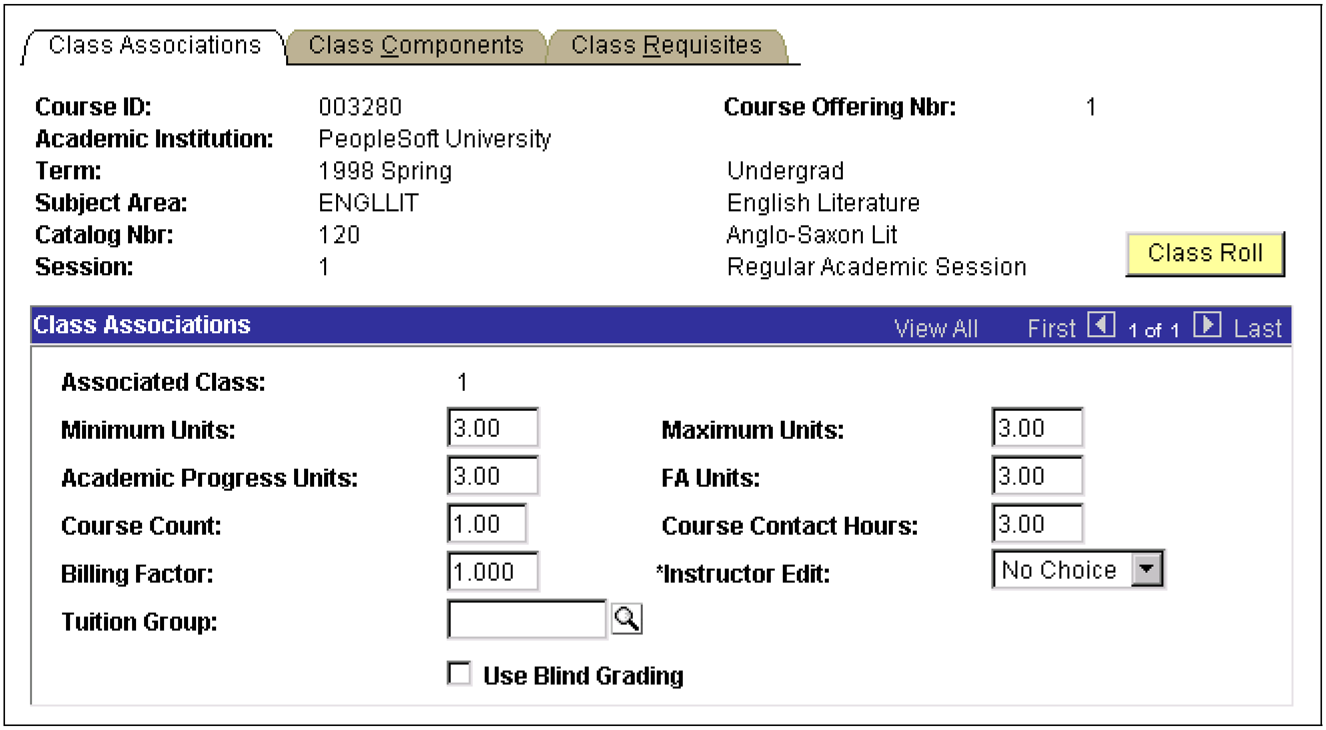
You must first schedule the class.

Pages Used to Define Class Associations

Page Name	Object Name	Navigation	Usage
Class Associations	CLASS_ASSOC	Manage Student Records, Establish Courses, Use, Class Associations, Class Associations	Adjust units, change instructor edit views, and select the blind grading option after you schedule a class. All data on the page defaults from the Course Catalog component. All of the data elements can be changed for a class association.
Class Components	CLASS_ASSOC_CMPNT	Manage Student Records, Establish Courses, Use, Class Associations, Class Components	Modify aspects of class components such as grading basis, course components, and requirement designations.
Class Requisites	CLASS_ASSOC_RQS	Manage Student Records, Establish Courses, Use, Class Associations, Class Requisites	Modify, and, if appropriate, add more requisites to a class.

Adjusting Units

Access the Class Associations page.



Class Associations page

The system creates the record here when you enter and save the schedule of classes. The associated class number links all class sections that constitute a single course offering. For example, all lab and discussion sections plus the associated lecture sessions have the same Associated Class number. The system populates all of these fields by default from the course catalog.

Note. Association number *9999* can be associated with any other associated class number. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course (such as lecture, lab and discussion) from within the same associated class group (or from group 9999).

Minimum Units and **Maximum Units** — The system populates the minimum units and maximum units fields by default from the course catalog. You can override these values.

Academic Progress Units and **FA Units** (financial aid units) — The system populates these fields by default from the course catalog. You can override these values. The fields are unavailable for entry for variable unit courses.

Course Count — The system populates this field by default from the course catalog. The course count indicates the worth, or count, of the course towards an advising requirement. Some institutions count courses, as well as units, towards degree requirements. You can override this value.

Course Contact Hours — The system populates this field by default from the course catalog. Course contact hours may be used for manual workload analysis. You can override this value, which you initially define on the Catalog Data page. Use this field only if you want to report contact hours manually.

The Instructor Workload feature does not reference this free form field.

See Chapter 18, “Tracking Instructor Workload,” page 425.

If you track contact hours manually and therefore use the Course Contact Hours field, the course contact hours should equal the instructor contact hours. If you are overriding the value of Course Contact Hours, then to maintain consistency—and therefore increase clarity—we recommend that you update the instructor contact hours using the Meetings page. The system itself performs no cross-reference verification to ensure that the corresponding values match.

Billing Factor

The system populates this field to *1* by default. The billing factor regulates billing units, which the system uses to calculate per unit fees. When you establish fees for terms, courses, and classes, you can assess a per unit fee which is derived from the billing units on the student's enrollment record. Billing units are equal to the Billing Factor times Academic Progress Units (BU = BF x APU). So if billing factor is set to *1* and Academic Progress Units is set to *3,* billing units would be *3.* On the other hand, if billing factor is set to *2,* and academic progress units is set to *3,* billing units would be *6.* Because billing factor defaults to *1,* billing units are usually equal to academic progress units.

The Student Enrollment 1 page is the only place where you can override billing units for an individual enrollment. The only time that billing units and academic progress units would differ is when the Billing Factor is set to anything other than *1,* or if either of these values were changed on the Student Enrollment 1 page.

Instructor Edit

Select how you want the system to prompt for instructor ID's during class scheduling and enrollment. This option determines the availability of the Instructor ID field for independent study courses during enrollment, where the student has the option to select the instructor. The system populates the value for the Instructor Edit field by default from the Catalog Data page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

No Choice: If you select this option, the system makes the Instructor ID field on the Enrollment Request page unavailable and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Schedule of Classes - Meetings page: Assignment tab. Thus, the student has no choice of instructor.

Class Instructor Edit: If you select this option, the system makes active the Instructor ID field on the Enrollment Request page and prompts you with only the primary instructors for the class, as defined on the Meetings page.

Use this option for independent study courses or the like, for which the student can select one of several 'Primary' instructors.

Instructor/Advisor Edit: If you select this option, then for the Instructor ID field on the Meetings page the system prompts you with only those instructors that are available to teach this course, as defined on the Instructor/Advisor Table page.

The system also makes the Instructor ID field on the Enrollment Request page unavailable for entry, and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Meetings page.

Therefore, *do not* select the *Instructor/Advisor Edit* option for an Independent Study course where you want students who enroll in these courses to have their choice of instructor.

Note. To activate the instructor/advisor edit your institution must first select on the Academic Organization Table page to edit instructors against instructor/advisor for the academic organization to which this class belongs.

Tuition Group

Regardless of the tuition group that you enter on this page, all students are charged tuition based on their own tuition group. Use this field to designate a specific group of students that you want to charge additional course fees for the course.

This field is optional.

See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Setting Up Fees and Tuition Groups," Setting Up Tuition Groups.

Use Blind Grading

Select this check box to enable grade rosters for blind grading. The system populates this field by default from the Course Catalog - Offerings page.

When you generate grade rosters for a course that invokes blind grading, instead of student names on the roster, the system generates random numbers.

Class Roll

If the class is scheduled and students are enrolled, and you make changes to the fields in the Class Associations component, in most cases this affects student enrollment. You therefore need to update the enrollment records of each student in the class. To do so, click the Class Roll button for all rows on the page. The system creates enrollment maintenance transactions through a COBOL process and displays for you an enroll request ID related to these transactions. We suggest that you write down the enrollment request ID numbers for use on the Block Enrollment page.

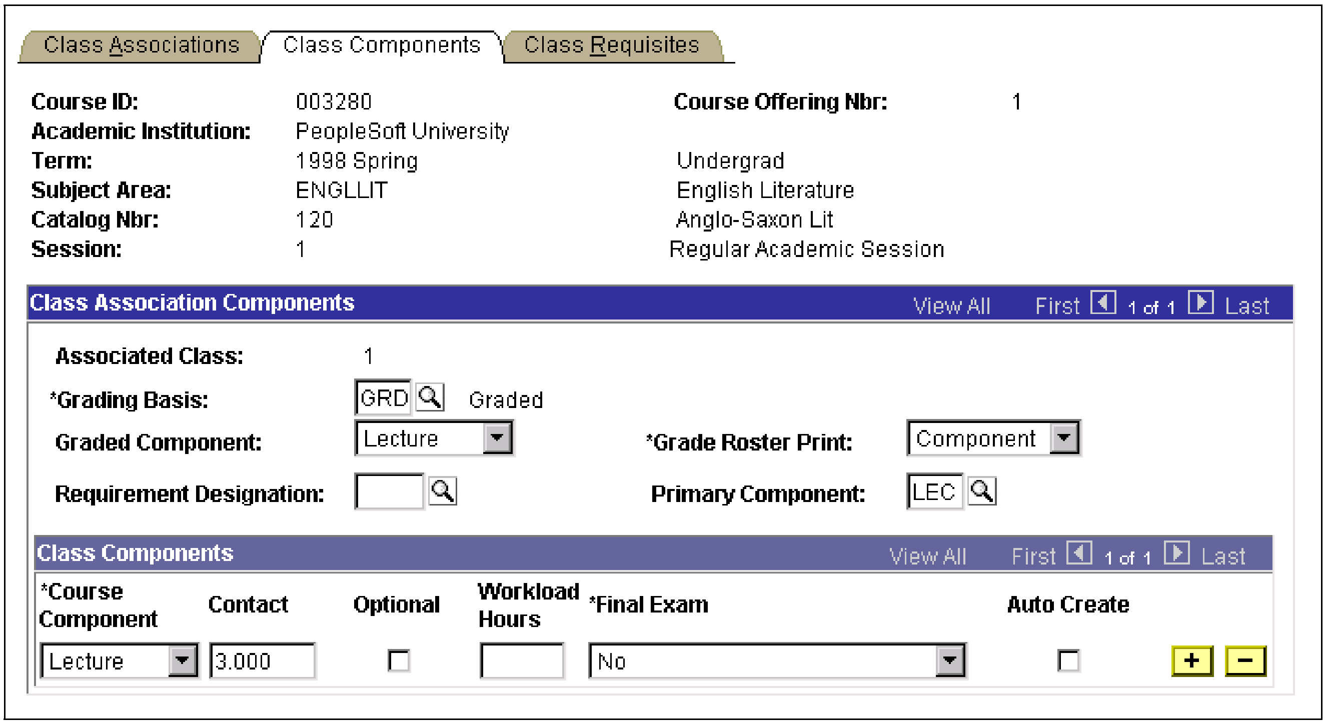
The COBOL process considers the following fields when updating student records:

- Minimum Units
- Academic Progress Units (when minimum and maximum units are the same)
- Financial Aid Units (when minimum and maximum units are the same)
- Course Count (if set to Course Count Enrollment on the Academic Program - Course page)
- Billing Factor
- Tuition Group
- Grading Basis
- Requirement Designation

Note. To update the students' records, you must navigate to the Block Enrollment page and run the block enrollment process using this enroll request ID. The system uses the enrollment maintenance transactions grouped within this enroll request ID to update the student enrollment records that your changes have affected.

Modifying Class Components

Access the Class Components page.



Class Components page

The system creates the record here when you enter and save the schedule of classes. The Associated Class number links all class sections that constitute a single course offering. For example, all lab and discussion sections plus the associated lecture sessions have the same Associated Class number.

The system populates all of these fields by default from the course catalog.

See Chapter 4, "Setting Up the Course Catalog," Creating Course Offerings, page 66.

Note. Association number *9999* can be associated with any other Associated Class number. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course (such as lecture, lab and discussion) from within the same associated class group (or from group 9999).

Grading Basis

The system populates this field by default from the course catalog. Select the grading basis to use for the class. Grading basis values are linked to Grading Schemes on the Grading Scheme Table page.

Grade Roster Print

Select the type of grade roster that you want to print for this associated class (as processed through the Grade Roster Print page). Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices for grade roster print are:

By Student: Grade rosters print for each student. Each student has a distinct grade roster, separated by a page break.

Component: Grade rosters print for the graded component of the class. The graded component is specified on the Course Catalog - Components page.

Instructor: Grade rosters print for the graded component of the class. The graded component is specified on the Course Catalog - Components page. A copy of the grade roster prints for each instructor, primary or otherwise. The number of copies that print is equal to the number of instructors for the class (primary or otherwise).

None: No grade roster prints for the class.

Graded Component

The system populates this field by default to the component on the Components page that has the Graded Component check box selected. You can override this value. Select the graded component, indicating the component with which the course grade is associated.

Once students enroll in a component within the Class Association, this field is unavailable for entry.

Requirement Designation

Select a requirement designation for the class. A requirement designation can be extra work that has to be done for a course, such as Design Credit, or a requirement designation can specify a special type of a course to use in a course list for the Academic Advisement application. Requirement designation values are defined on the Requirement Designation Table page, and default from the Catalog Data page. Example requirement designation values are *Design Credit, Thesis Choice,* and so on.

Requirement designations feed into the Academic Advisement application.

See Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Creating Requirement Designations, page 22.

Primary Component

If you are using the Dynamic Class Dates feature, it is mandatory that you select a primary component for the class, even if you only have one component. The Dynamic Class Dates process uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses the primary component value as defined in this field. You can select to include other components of the class in Dynamic Class Dates process calculations on the Schedule of Classes - Basic Data page.

Once students enroll in a component within the Class Association, this field is unavailable for entry.

Course Component

Select a course component for the class association. The system populates this field by default from the Course Catalog - Components page. Values for this field are delivered with your system as translate values. You can modify these values. The course component indicates the parts of the course offering (*lecture, laboratory, seminar,* and so on). One course offering can have multiple components.

Contact — Enter the contact hours you want to record for the instructors teaching this component of the course. The Instructor Workload feature does *not* reference this free form field. Use this field only if you want to report contact hours manually.

Note. Modifying the Course Component(s) and the Contact hours for each component creates inconsistency between this page and the Meetings page. Although the corresponding fields on the Meetings page are free for you to edit and have no impact elsewhere in the system, we recommend that for clarity you maintain consistency between these two pages. The system itself performs no cross-reference verification to ensure that the corresponding values match. Thus, to maintain consistency you should verify that the course component contact hours on this page equal the instructor Contact hours on the Meetings page.

Optional — If you select this check box, enrollment in the component is optional for this associated class.

Workload Hrs (workload hours) and **OEE Workload Hrs** (open entry/exit workload hours) — If you have selected the Calculate Workload check box on the Academic Institution 4 page, thereby activating the automated Instructor Workload feature, the Workload Hrs field appears on the Class Components page. The Workload Hrs or OEE Workload Hrs field defaults to the Workload Hours specified on the Course Catalog - Components page. In other words, if you set the lecture to 3 workload hours on the Course Catalog - Component page, then whenever a lecture for this course is scheduled, the lecture component defaults to 3 workload hours on the Class Components page. Similarly, if you set the laboratory component to 1 workload hour on the Course Catalog - Components page, then whenever a laboratory for this course is scheduled, the laboratory component defaults to 1 workload hour on the Class Association — Class Components page. The user can modify the component values on the Class Association — Class Components page if necessary. This field is optional.

The Workload Hrs specified here can be used by the default Workload Hours Formula as specified by the Course Component Workload Hours% field on the Academic Institution 4 page.

Final Exam — Select whether a final exam is given in the course. The value defaults from the Course Catalog - Components page. Final exam values are delivered with your system as translate values. Add as many values to the translate table for the final exam as needed. The only value that you must not remove from the translate table is *Yes,* which has coding attached to it. Your choices are:

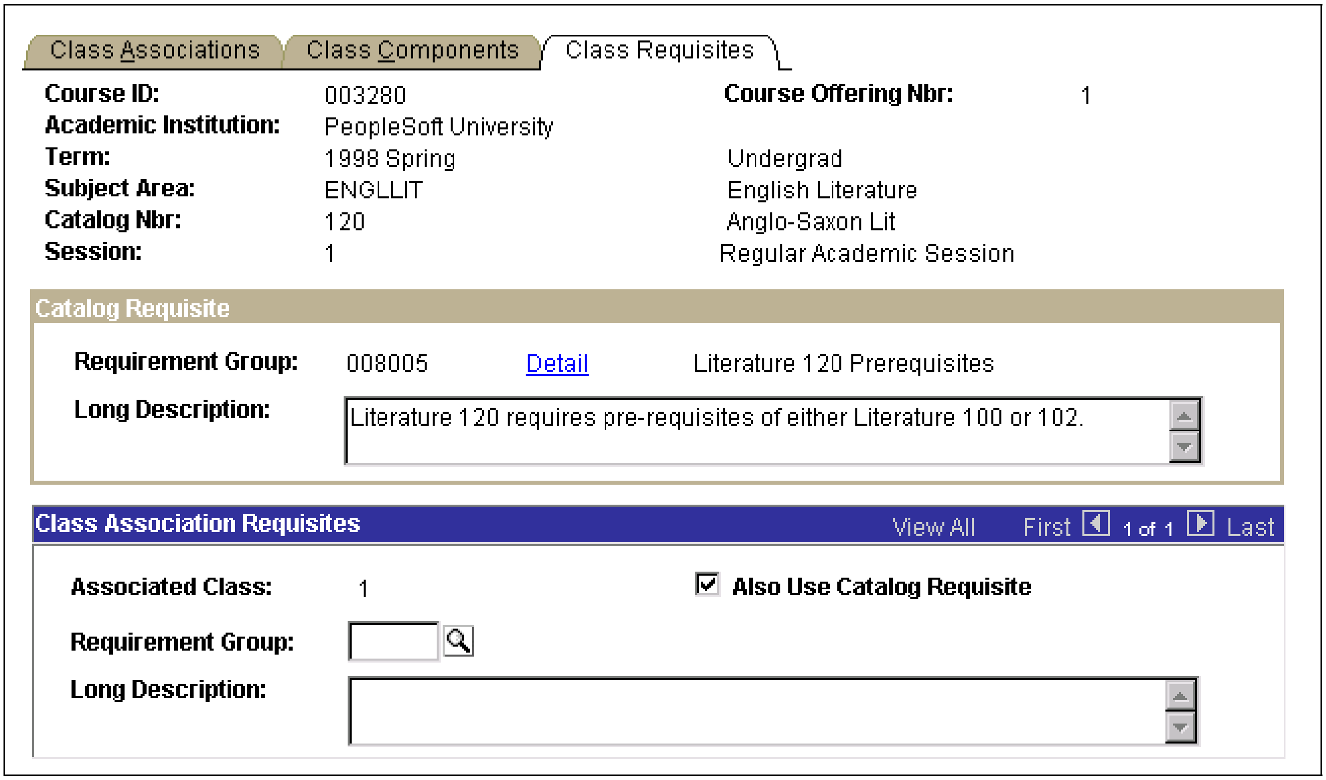
Yes: The *Yes* value enables block final exam scheduling.

No: Indicates that this component has no final exam. Entering *No* eliminates this component from the block exam scheduling process.

Last Class: Indicates that a final exam is taken in the last regularly scheduled class (as opposed to during final examination week). Entering *Last Class* eliminates this component from the block exam scheduling process.

Modifying Requisites

Access the Class Requisites page.



Class Requisites page

Detail Click to access the Requirement Group Summary page, where you can review the enrollment requisites for both the course and class.

Also Use Catalog Requisite Select to command the system to use the course catalog requisite as well as the class requisite in the enrollment process.

Note. If you have requisites in the course catalog and you do not want to use them for the class offering, clear the Also Use Catalog Requisite check box.

Requirement Group Select the class requisite requirement group. Requirement group values are created through the Enrollment Requirement Group component.

Long Description The system populates this field by default to the long description of the enrollment requirement group.

Defining Class Permissions

This section provides an overview of class permissions, and discusses how to:

- Create class permissions.

- Run the class permission process.

Understanding Class Permissions

Class permissions are numbers that you can associate with a class and assign to students to use at enrollment time. As long as a student does not violate overall student limitation rules (such as maximum number of units), the enrollment engine enrolls the student with a permission number into the class he or she requests. You can create *general* or *student-specific* permissions. You can also use the Class Permission process to generate general class permissions for an entire subject area.

If you have the appropriate enrollment access, you can override class permissions during enrollment by selecting the Override Permission Nbr (override permission number) check box on the Enrollment Request page. The enrollment engine then overrides:

- Consent, as defined in the Catalog Data page and the Enrollment Cntrl (enrollment control) page.
- Permissions—both general and student-specific.

You can create *general* or *student-specific* permissions. You can also use the Class Permission process to generate general class permissions for an entire subject area.

To create a student-specific permission:

1. On the Schedule of Classes - Basic Data page, select the Student Specific Permissions check box.
2. On the Class Permission Numbers page, enter the ID Numbers of students who have permission to enroll in a specific class. Also enter the Expire Date.
3. If a student's name has been entered on the Class Permission Numbers page for a particular class, at enrollment time the student can enroll in the class and the system automatically allows him or her entrance provided that he or she enrolls prior to the Expire Date of the permission.
4. Once the student enrolls in the class, the system records the permission as used and records the use date. The system displays this information on the Class Permission Numbers page.

To create general class permissions:

1. The system automatically populates the Default Date field, which is the default expire date. If necessary, select a new default date. When you add permissions for a class, the system populates the Expire Date field with the default date value.
2. Make sure the Student Specific Permissions check box is cleared. You can control this check box on the Schedule of Classes − Basic Data page. Then enter the number of permissions you want to create for a class in the Assign More Permission field.
3. Press the TAB key to invoke the permission number generation.
4. Grant these permission numbers to students. When students enroll in the class, they provide the permission number for the Permission field on the Enrollment Request 1 page. The student can use the permission number to enroll in the class provided he or she uses the permission number prior to its expire date.

Prerequisites

Before you can define class permissions, you must:

- Schedule a class.

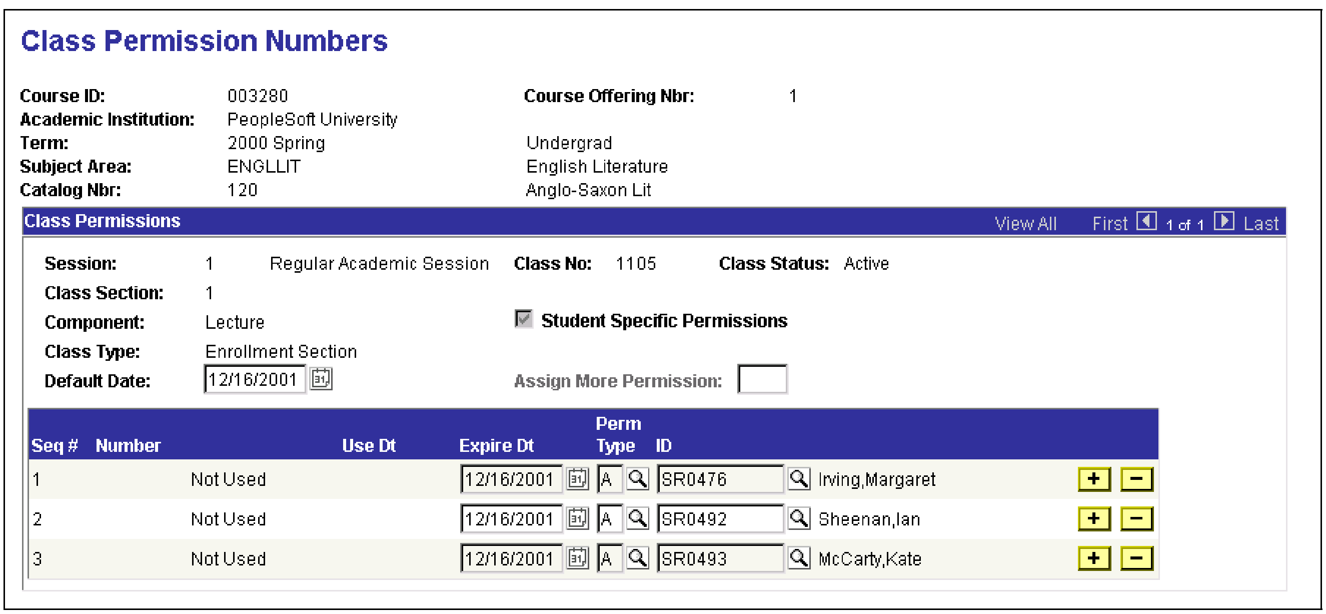
- Select the Student Specific Permissions check box on the Basic Data page (for student specific permission numbers.)
- Clear the Student Specific Permissions check box on the Basic Data page, and enter an Assign More Permission value and tab out of the field (for general class permission numbers.)

Pages Used to Create Class Permission Numbers

Page Name	Object Name	Navigation	Usage
Class Permission Numbers	CLASS_PERMISSION	Manage Student Records, Establish Courses, Use, Class Permission Numbers, Class Permission Numbers	Assign student-specific permission numbers or to create general class permission numbers.
Class Permission	RUNCTL_SRSPRMSN	Manage Student Records, Establish Courses, Process, Class Permission, Class Permission Run Control	Create general class permission numbers for an entire term and subject area. Before you access the Class Permission page, the Consent field on the Enrollment Cntrl (enrollment control) page for all classes within the subject you specify must be set to *Departmental* or *Instructor.*

Creating Class Permission Numbers

Access the Class Permission Numbers page.



Class Permission Numbers page

Student Specific Permissions This field displays your selection for the Student Specific Permissions check box on the Schedule of Classes – Basic Data page.

Default Date

The default expire date. When you add permissions for a class, the system populates the Expire Date column with the default date value. The system pulls the value for the Default Date field from the SESS_TIME_PEROD table or the SESSION_TABLE based on the following criteria:

If the value of the add/drop action for the TIME_PERIOD field on the SESS_TIME_PEROD table is 140 and an end date value exists for this field, the system retrieves this end date value as the Default Date.

If the end date for the TIME_PERIOD field on the SESS_TIME_PEROD table does not exist, the system retrieves the end date for the term as the default date. The system retrieves this value from the SESSION_TBL_END_DT field on the SESSION_TABLE page.

Assign More Permission

This field is used for assigning general permissions and is unavailable for student-specific permissions. Enter the number of general permission numbers you want to generate in the Assign More Permission field. Then press the *TAB* key to invoke the permission number generation.

Sequence Number

The system generates a sequence number and assigns it to each permission based on the order you create the permissions.

Permission Used

When you create a permission, the system displays the status of the permission as *Not Used.* When the student enrolls in the class, the system changes the status to *Used.*

Use Dt (use date)

The date the student used the permission.

When a student uses a permission number, the system updates the Class Permission Numbers page by displaying the name of the student who used the permission, the status of *Used*, and the *Use Date.*

Expire Date

This is a required field. For each student, enter the date the permission expires. When you enter new permissions, the system populates this field by default to the Default Date field value. If the student does not use the permission by the expire date, the student no longer has permission to enroll in the class.

Perm Type (permission type)

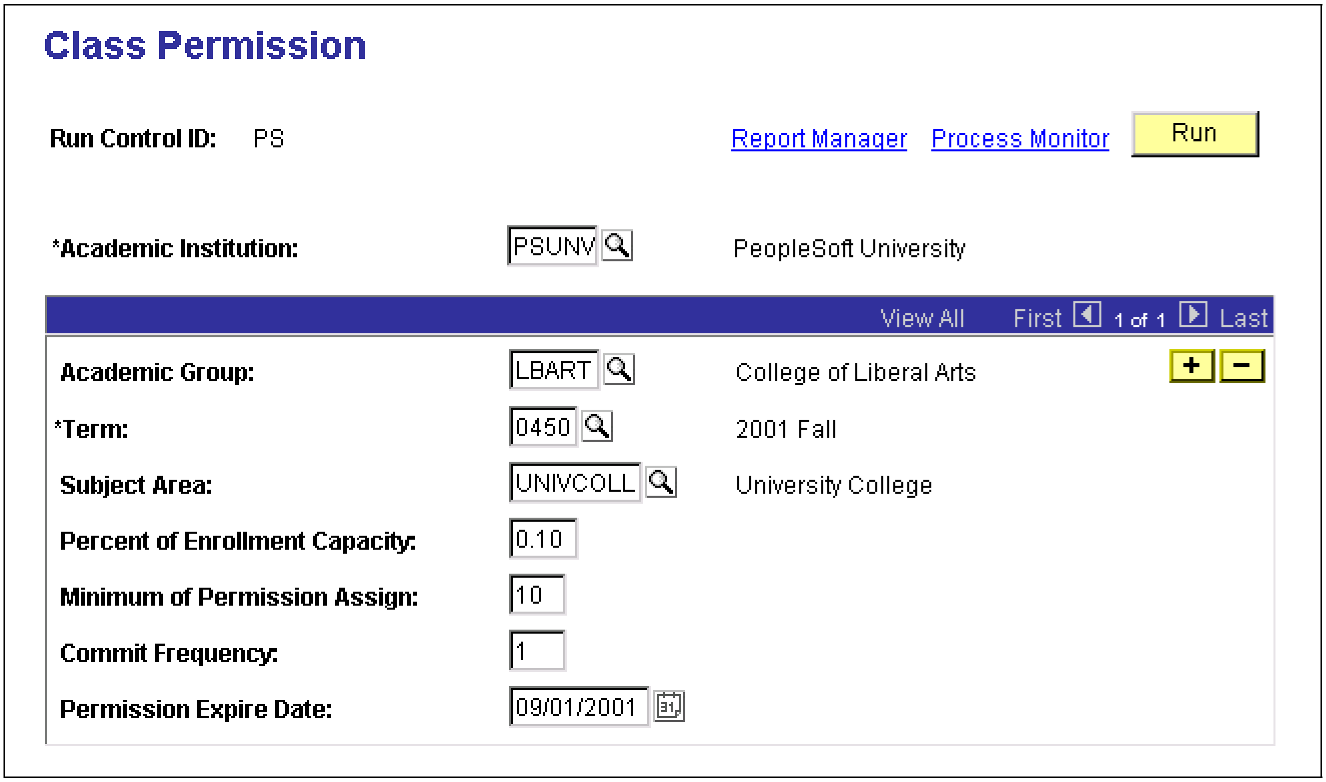
The system populates the Perm Type field to *Add* by default for students enrolling in a class. Permission type values of *Add* and *Drop* are delivered with your system as translate values. This field is editable only for those classes where the Student Specific Permission check box is selected on the Basic Data page. The Perm Type field is for future functionality and currently has no programming tied to it.

ID

The identification number of the student whom you are assigning permission to enroll in the class. For general class permissions, this field populates with the ID of the student who uses the permission number to enroll.

Using the Class Permission Process

Access the Class Permission page.



Class Permission page

Academic Institution
Select the academic institution for which you want to generate class permissions. Academic institution values are defined on the Academic Institution Table page.

Academic Group
Select the academic group for which you want to generate class permissions. Academic group values are defined on the Academic Group Table page.

Term
Select the term for which you want to generate class permissions. Term values are defined on the Term Table page.

Subject Area
Select the specific subject area for which you want to generate class permissions. When you run the Class Permission process based on subject, the system looks to the Consent field on the Enrollment Cntrl (enrollment control) page and only creates permissions for classes within that subject that have the Consent field set to *Departmental* or *Instructor.* Subject area values are defined on the Academic Subject Table page.

Percent of Enrollment Capacity
Enter the percent of enrollment capacity the system should use to calculate the number of permissions it must create. In the example shown in the page above, the system creates general permissions for ten percent of the enrollment capacity for every class in the University College for Fall 2001.

Minimum of Permission Assign
Enter the minimum number of general permissions you want the system to assign. The system uses this number as the bottom line minimum number of general permission numbers to create for a class. In the example shown in the page above, if UNIV COLL 200 has an enrollment capacity of twenty,

ten percent of that would be 2. However, the system would generate ten permissions since the Minimum of Permission Assignvalue is *10.*

Commit Frequency The system populates this field to *1* by default. The lower the commit frequency, the better concurrence of data. While the higher the commit frequency enables faster processing of the job, the job could get tied up with another process. We recommend that you leave the commit frequency at *1*.

Permission Expire Date If a student does not use the permission before the expiration date, the student no longer has permission to enroll in the class. The system pulls the value of the Permission Expire Date field from the TERM_TABLE and SESS_TIME_PEROD tables for each section that exists based on the following criteria:

If the value of the add/drop action for the TIME_PERIOD field on the SESS_TIME_PEROD table is 140 and an end date value exists for this field, the system retrieves this end date value as the Default Date.

If the end date for the TIME_PERIOD field on the SESS_TIME_PEROD table does not exist, the system retrieves the end date for the term as the Default Date. The system retrieves this value from the TERM_TBL_END_DT field on the TERM_TABLE page.

Creating Combined Sections

This section provides an overview of combined sections, and discusses how to:

- Define a combined section ID.
- Link classes to a combined section ID.

Understanding Combined Sections

If you need to offer two or more separate classes as one class offering, you can combine sections. For example, you may have a course that is offered by the Economics Department (ECON 101) that is identical to a course that is offered by the Business School (BUSN 111). Perhaps you want to offer each class every semester (so students can pick and chose when they take the course), but there is only a maximum of 30 students total each semester who request the two classes, so it just isn't economical. To offer both courses in the schedule of classes each semester, yet have the courses be taught as a single class (with one professor, one location, one meeting pattern, and so on), you can combine sections. Students who enroll in the Economics department version can use one Class Number to enroll, and students who enroll in the Business Department's version can use a different class number to enroll. Yet, all of the students will participate in a single class environment, with one attendance roster, one grade roster, one instructor (or more, if you prefer) and so on. You can combine sections permanently or for a single class occurrence. You can also combine sections within or across subjects. When classes are linked to a combined section, they are all given the same Event ID. The enrollment and wait list capacities are controlled both at the section level and at the sections combined level.

Here's how to create combined sections:

1. Define a Combined Sections ID on the Combined Sections Table page.

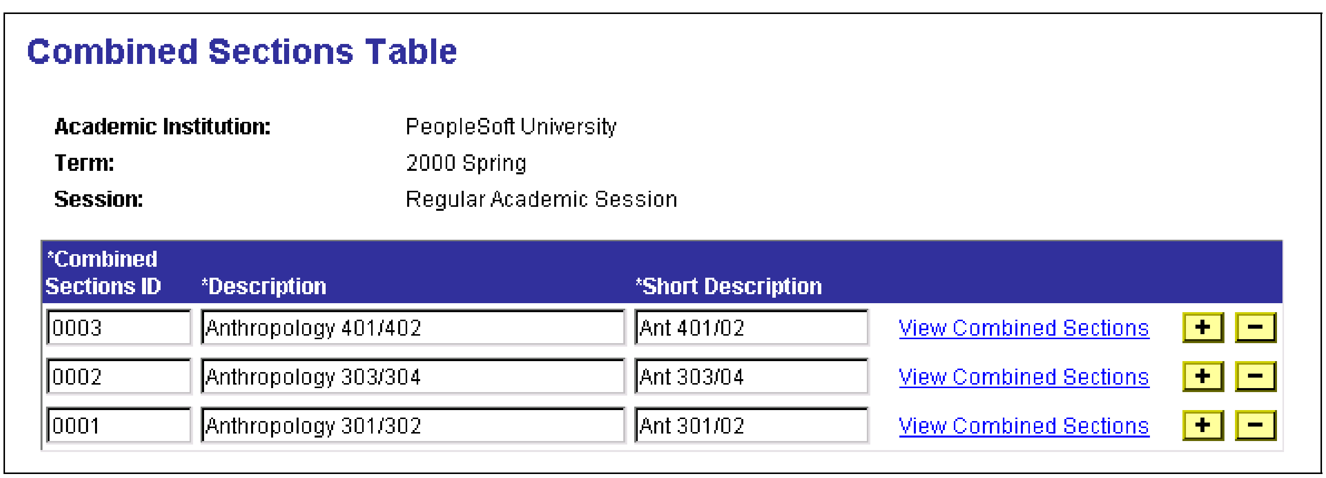
2. Link classes to the Combined Sections ID and choose a combination type on the Combined Sections page. Before you combine sections be sure that a facility ID (if one was entered) exists for only one of the classes you are combining.

Pages Used to Create Combined Sections

Page Name	Object Name	Navigation	Usage
Combined Sections Table	SCTN_CMBND_TBL	Manage Student Records, Establish Courses, Use, Combined Sections Table, Sections Combined Table	Create section combined IDs for each term and session at your institution.
Combined Sections	SCTN_CMBND	Manage Student Records, Establish Courses, Use, Combined Sections, Sections Combined	After you create a combined section ID, link classes to the ID, and to determine the combination type. Once you combine classes, you must perform all updates to the meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. When you edit this information for a combined section, it is automatically propagated to all of the other combined sections within the same Combined Sections ID. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information grays out for combined sections.

Defining a Combined Section ID

Access the Combined Sections Table page.



Combined Sections Table page

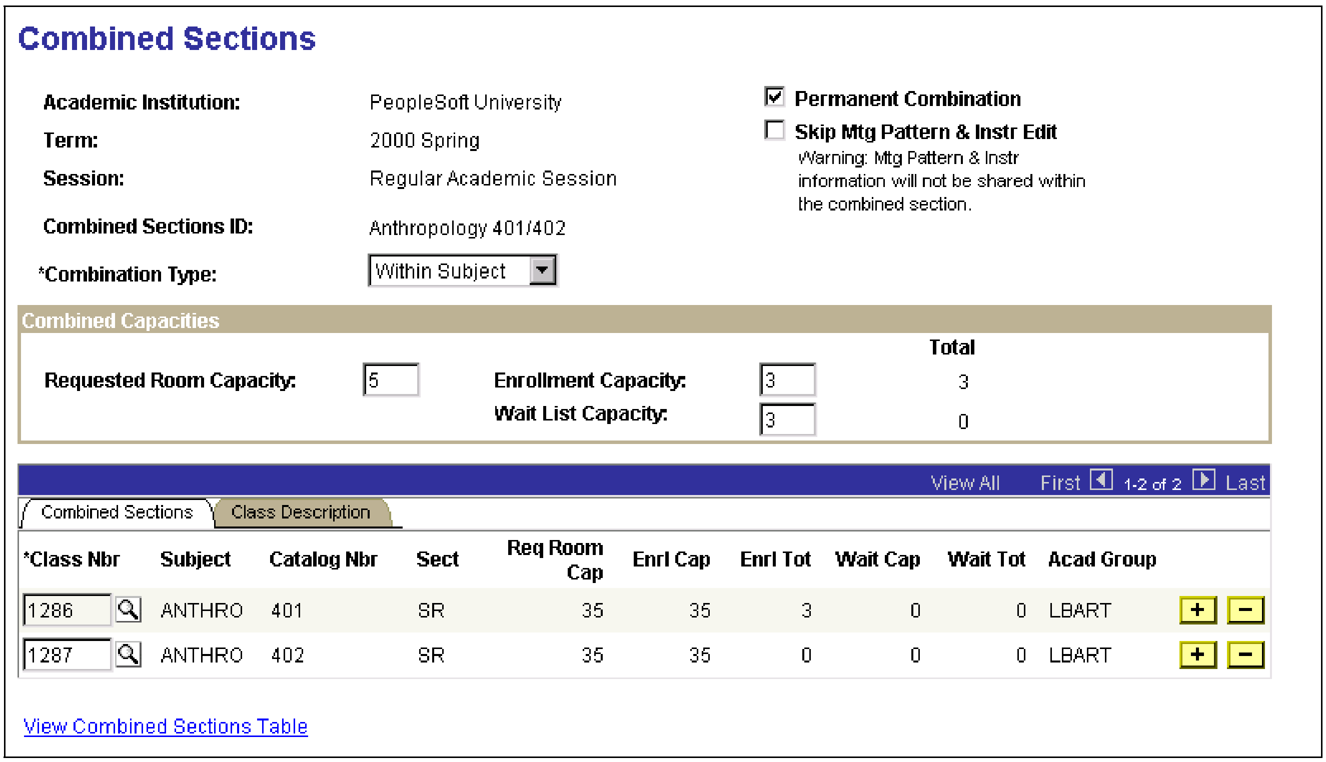
Combined Sections ID The system generates a combined sections ID, providing a unique identifier for each combined sections record.

Description and **Short Description** Enter a description and a short description for the combined sections ID. We suggest that these names have some descriptive value to the administrator who assigns these IDs to classes. The descriptions are not visible by students.

View Combined Sections Click to access the Combined Sections Table page, where you can view classes that are linked to a specific combined section ID.

Linking Classes to a Combined Section ID

Access the Combined sections page.



Combined Sections page

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Combination Type Select the combination type. You combine sections *Within Subject, Cross Subject,* or *Both.* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Permanent Combination Select this check box to command the system to roll the combination when you perform the prior term copy process. If you clear this check box, the system assumes that the combination is a temporary arrangement for the current term.

Skip Mtg Pattern and Instr Edit (skip meeting pattern and instructor edit)
: Select this check box to combine sections with different meeting patterns and instructor information. In this case, you enter the meeting pattern and instructor information directly in the Schedule of Classes, but the updated data is *not* propagated across the sections. The system considers instructor workload for each of the sections, and does not combine hours. If necessary, instructor workload hours can be adjusted on the Meetings page.

Requested Room Capacity
: Enter the requested room capacity for the combined section. The room capacity can be different than the enrollment capacity. The requested room capacity is used with Universal Algorithm's Schedule25 software.

Note. Requested room capacity of combined sections is used for informational purposes only. The system only enforces individual section requested room capacities.

Enrollment Capacity and **Wait List Capacity**
: Enter the enrollment capacity and the wait list capacity for the combined section. The system updates the total as enrollments are processed. The system uses the lower of the individual section and combined section values.

View Combined Sections Table
: Click to access the Combined Sections Table page, where you can view or edit the section combined IDs.

Class Number
: Select the class numbers of sections to combine. If the instructor, meeting pattern, session begin and end date, or weeks of instruction are not identical to previously selected class numbers, an error occurs (unless you select the Skip Mtg Ptrn and Instr Edit check box).

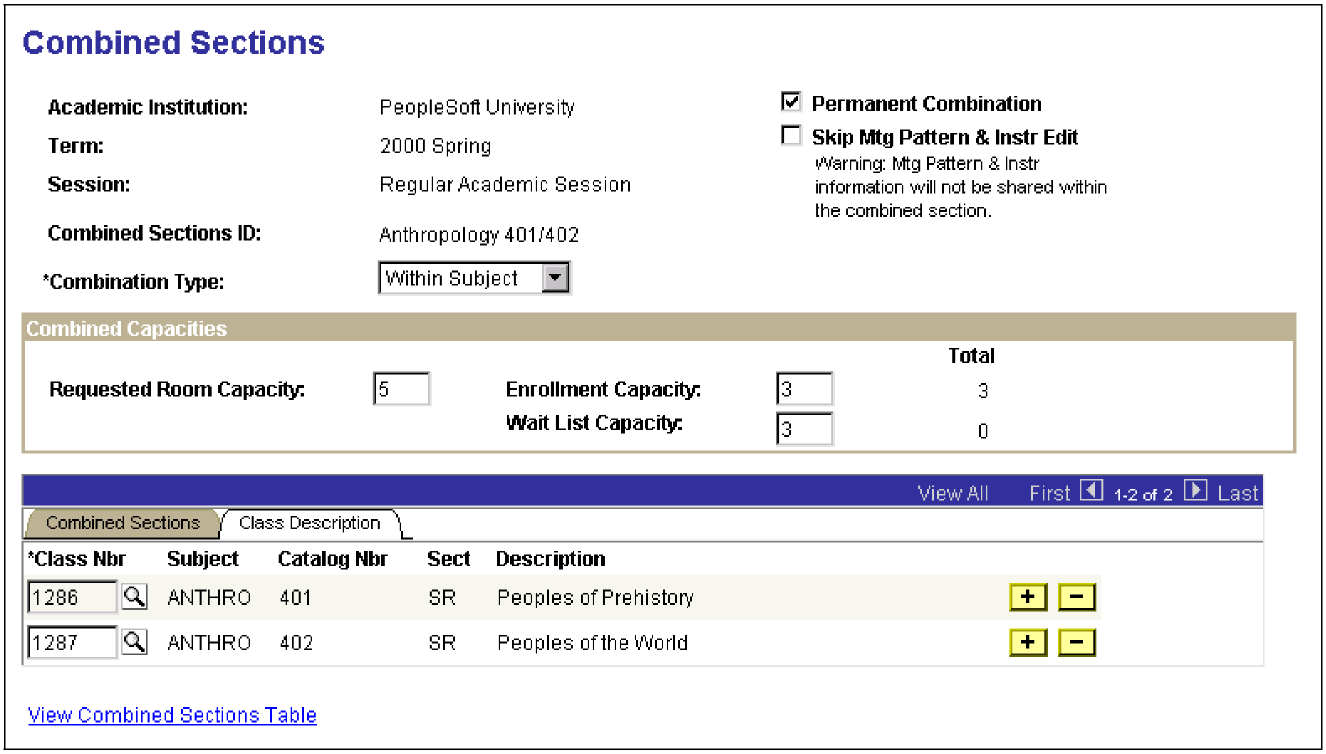
Note. If you combine sections that have Class Meeting Pattern Topic IDs assigned to them, the system deletes the topic IDs. This is to prevent possible data integrity problems. Combined sections share meeting pattern information and the sections within the combination may be different courses with their own topic IDs and descriptions.

For the same reason, you cannot assign class meeting pattern topic IDs to combined sections. However, you can assign free format topics.

See Chapter 17, "Managing the Schedule of Classes," Defining Class Meeting Patterns, page 361.

Note. When you remove a class from a combined section, the system deletes all meeting patterns and instructor data from the section that is removed, unless the Skip Meeting Pattern and Instr Edit check box is selected.

Class Description Tab



Combined Sections page – Class Description tab

Description The description of the class.

Scheduling Exams

This section provides an overview of exam scheduling, and discusses how to:

- Schedule exams for individual classes.
- Schedule exams in blocks.

Understanding Exam Scheduling

You can schedule exams on a class by class basis, or in large blocks. The block exam scheduling process is useful if you want to schedule exams in the same facility as the primary meeting for the class.

Here's how to schedule an exam for a single class (in a facility other than the regular class for the primary meeting):

1. Access the Schedule Class Meetings - Exam page.
2. Enter your reservation.

To schedule exams in large blocks:

1. Access the Exam Scheduling page and specify your processing parameters.

2. Run the Exam Scheduling process.

Prerequisites

Before you run the Exam Scheduling process, you must:

- Set the Final Exam field on the Course Catalog - Components page to *Yes.*
- Define Exam Codes on the Exam Code Table page.

Pages Used to Schedule Exams

Page Name	Object Name	Navigation	Usage
Schedule Class Meetings - Exam	CLASS_EXAM	Manage Student Records, Establish Courses, Use, Schedule of Classes, Exam	Link exams to one class section at a time and to edit facility information.
Exam Scheduling	RUNCTL_SREXSCHD	Manage Student Records, Establish Courses, Process, Exam Scheduling	Run the Exam Scheduling process to schedule exams in batch, and reserve the regularly scheduled facility.

Scheduling Exams for Individual Classes

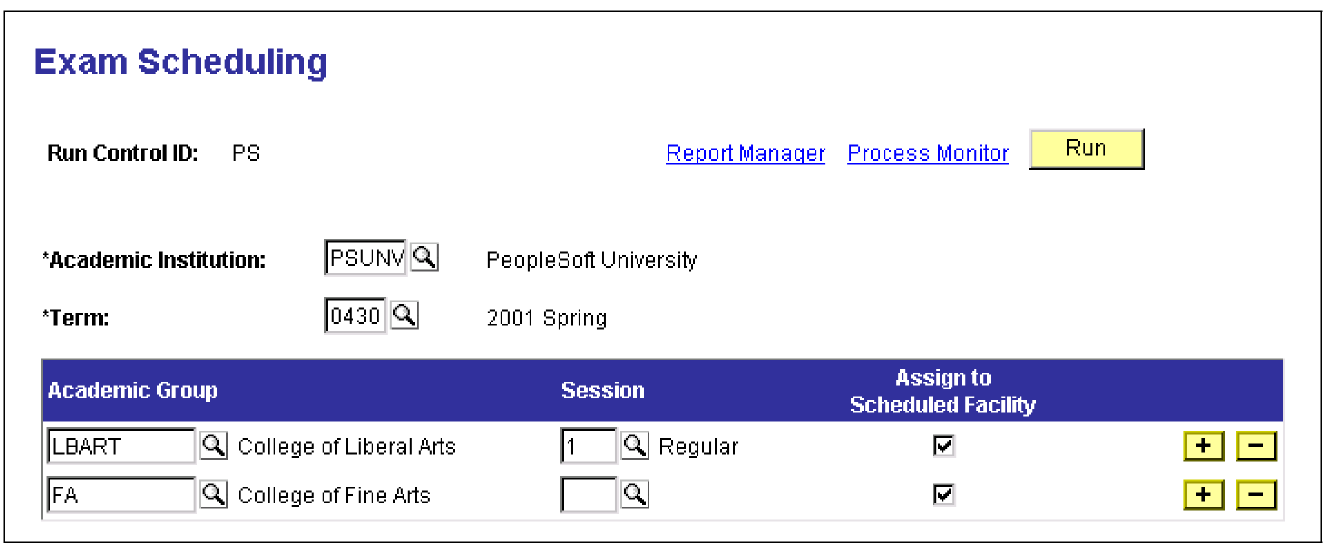
To schedule exams by individual section, use the Schedule Class Meetings component.

See Also

Chapter 17, "Managing the Schedule of Classes," Modifying Scheduled Class Meetings, page 375

Running the Exam Scheduling Process

Access the Exam Scheduling page.



Exam Scheduling page

Academic Institution Select the academic institution for which you want to schedule exams.

Term	Select the term for which you want to schedule exams.
Academic Group and **Session**	Select the academic group and session for which you want to schedule exams. Academic group values are defined on the Academic Group Table page. Session values are defined on the Session Table page.
Assign to Scheduled Facility	Select this check box to command the system to assign exams the same facilities in which the class is scheduled for the term. If you clear this check box, exams are scheduled without a facility.

Note. When scheduling exams for class sections with multiple meeting patterns, the Exam Scheduling process assigns final exam codes based on the class meeting pattern entered first on the Meetings page.

Troubleshooting the Exam Scheduling Process

Setup issues that can cause the Exam Scheduling SQR to not schedule exams include the following:

- Exam Code table not set up correctly to correspond with all possible class meeting patterns.
- Exam Code table not set up for the specified term and session.
- Exam Scheduling page must have the correct academic group.
- Exam Scheduling page must have the correct session code.
- Class must be set up on the Class Associations - Class Components page with a Final Exam value of Yes.
- Class meeting patterns are not set up for the class.
- Facility will not be reserved if you run the process where the Assign to Scheduled Facility check box is not selected.
- Facility will not be reserved if you run the process where the Assign to Scheduled Facility check box is selected, but the facility is already in use by another event during the exam time.

Modifying Course Events

This section discusses how to modify course events.

Prerequisite

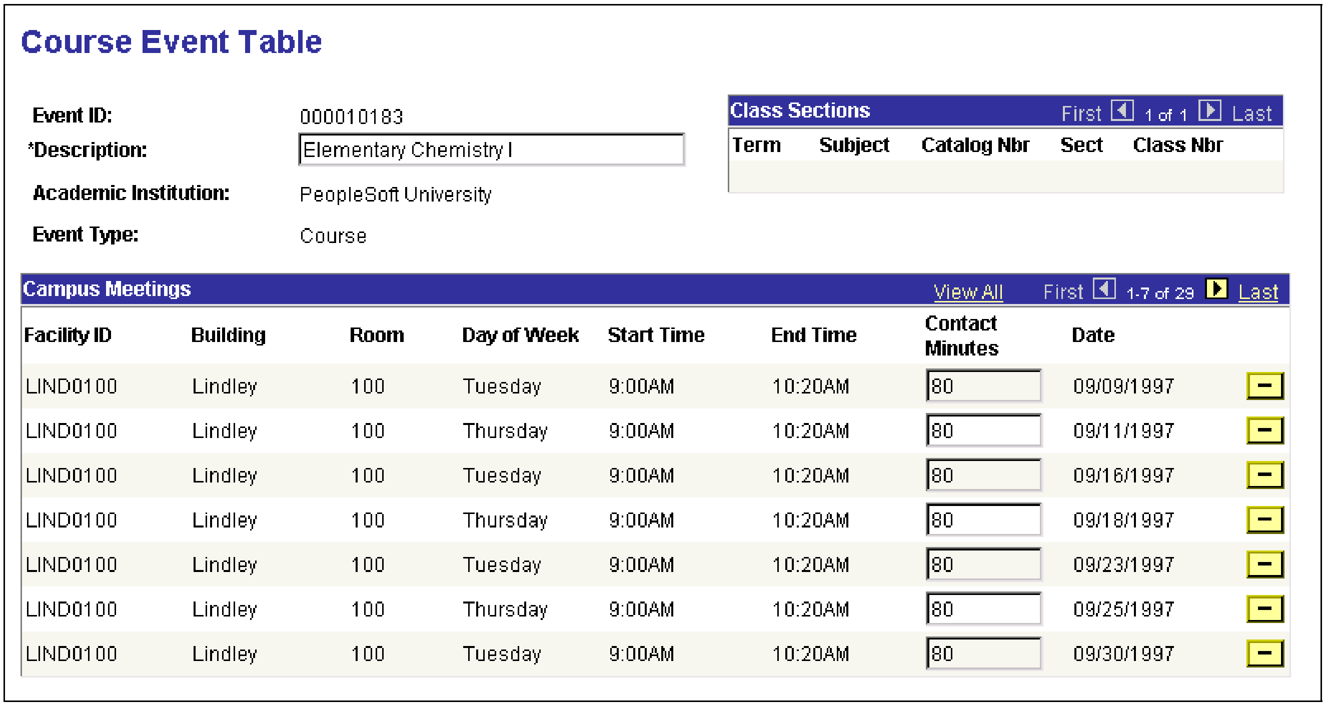
You must first have an Event ID record in your system.

Pages Used to Modify Course Events

Page Name	Object Name	Navigation	Usage
Course Event Table	COURSE_EVENT	Manage Student Records, Establish Courses, Use, Course Event Table, Course Event Table	Review a class section's facility reservations, and modify or delete facility reservations by date.

Using the Course Event Table Page

Access the Course Event Table page.



Course Event Table page

Description The description of the course event. This is the course description.

Contact Minutes Modify contact minutes for individual classes if necessary. The system bases the contact minutes on the start and end time of the course as defined in the Schedule of Classes. Changing Contact Minutes for a class meeting has no impact on Course Contact Hours or Instructor Contact Hours. If you have a particular class meeting that you would like additional facility time (perhaps a day for group project presentations, where students need additional time to take down their presentation materials at the end of class), you can increment the contact minutes to your desired reservation time. In addition, you can delete a single meeting facility reservation to make the facility available for another event. Click the Save button to edit the facility reservation. If facility checking is active, the system verifies that your requested reservation is valid before saving the request.

Note. If you are using the PeopleSoft facility conflict checking logic, be sure when you are scheduling classes that you indicate a facility for at least one component of a course. The system does not populate the Course Event Table page unless a facility is booked for at least one component of a course. You indicate facilities for course components on the Meetings page.

Viewing Instructor Schedules

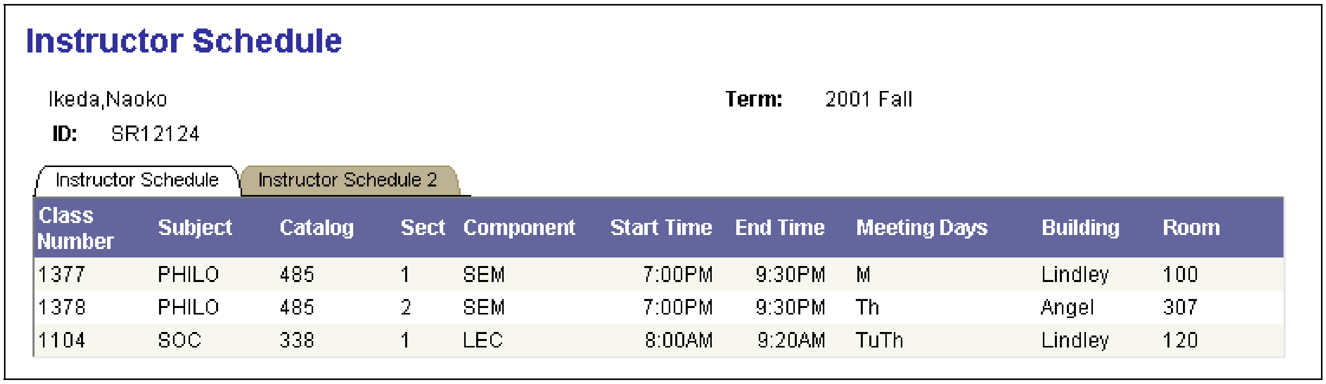
This section discusses how to view instructor schedules.

Pages Used to View Instructor Schedules

Page Name	Object Name	Navigation	Usage
Instructor Schedule	INSTR_CLASS	Manage Student Records, Establish Courses, Use, Instructor Schedule, Instructor Schedule	Review an instructor's class schedule for a term.

Viewing an Instructor's Schedule

Access the Instructor Schedule page.



Instructor Schedule

Ikeda,Naoko Term: 2001 Fall

ID: SR12124

Instructor Schedule | Instructor Schedule 2

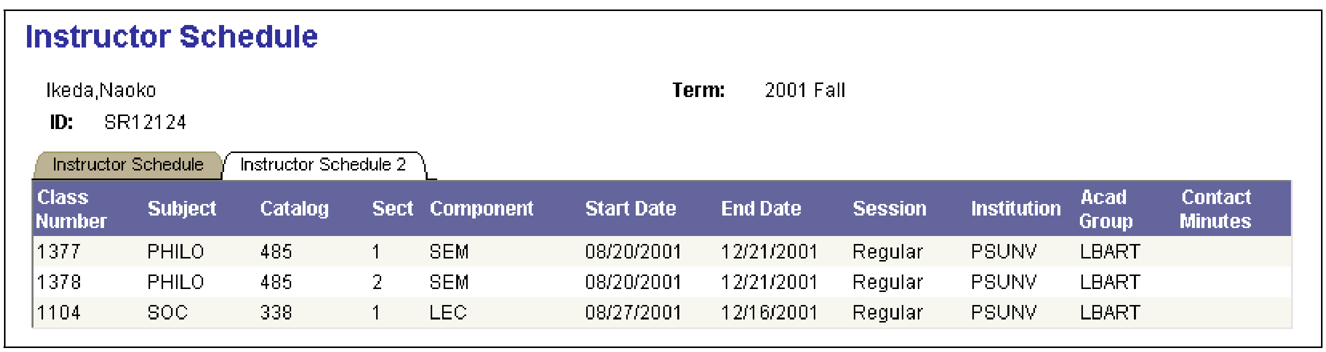
Class Number	Subject	Catalog	Sect	Component	Start Time	End Time	Meeting Days	Building	Room
1377	PHILO	485	1	SEM	7:00PM	9:30PM	M	Lindley	100
1378	PHILO	485	2	SEM	7:00PM	9:30PM	Th	Angel	307
1104	SOC	338	1	LEC	8:00AM	9:20AM	TuTh	Lindley	120

Instructor Schedule page: Instructor Schedule tab

The system displays all class meetings for an instructor within a term.

Instructor Schedule 2 Tab

Select the Instructor Schedule 2 tab.



Instructor Schedule

Ikeda,Naoko Term: 2001 Fall

ID: SR12124

Instructor Schedule | Instructor Schedule 2

Class Number	Subject	Catalog	Sect	Component	Start Date	End Date	Session	Institution	Acad Group	Contact Minutes
1377	PHILO	485	1	SEM	08/20/2001	12/21/2001	Regular	PSUNV	LBART	
1378	PHILO	485	2	SEM	08/20/2001	12/21/2001	Regular	PSUNV	LBART	
1104	SOC	338	1	LEC	08/27/2001	12/16/2001	Regular	PSUNV	LBART	

Instructor Schedule page: Instructor Schedule 2 tab

The system displays additional detail information for all class meetings for an instructor within a term.

Understanding Self-Service Instructor View My Class Schedule

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learning Management application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

Pages Used to View Instructor Class Schedules

Page Name	Object Name	Navigation	Usage
View My Class Schedule - Term Search	INSTR_CLASS2	SA Self Service, Learning Management, Management, View My Class Schedule	Instructors can specify the term for which they want to view their class schedule.
View My Class Schedule	INSTR_CLASS3	SA Self Service, Learning Management, Management, View My Class Schedule	Instructors can review the details of the classes they are assigned to teach for a specific term.

Understanding Self-Service Instructor View My Weekly Schedule

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learning Management application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

The PeopleSoft View My Weekly Schedule feature enables instructors to view a weekly snapshot of their schedule, as of a date they specify.

Prerequisite

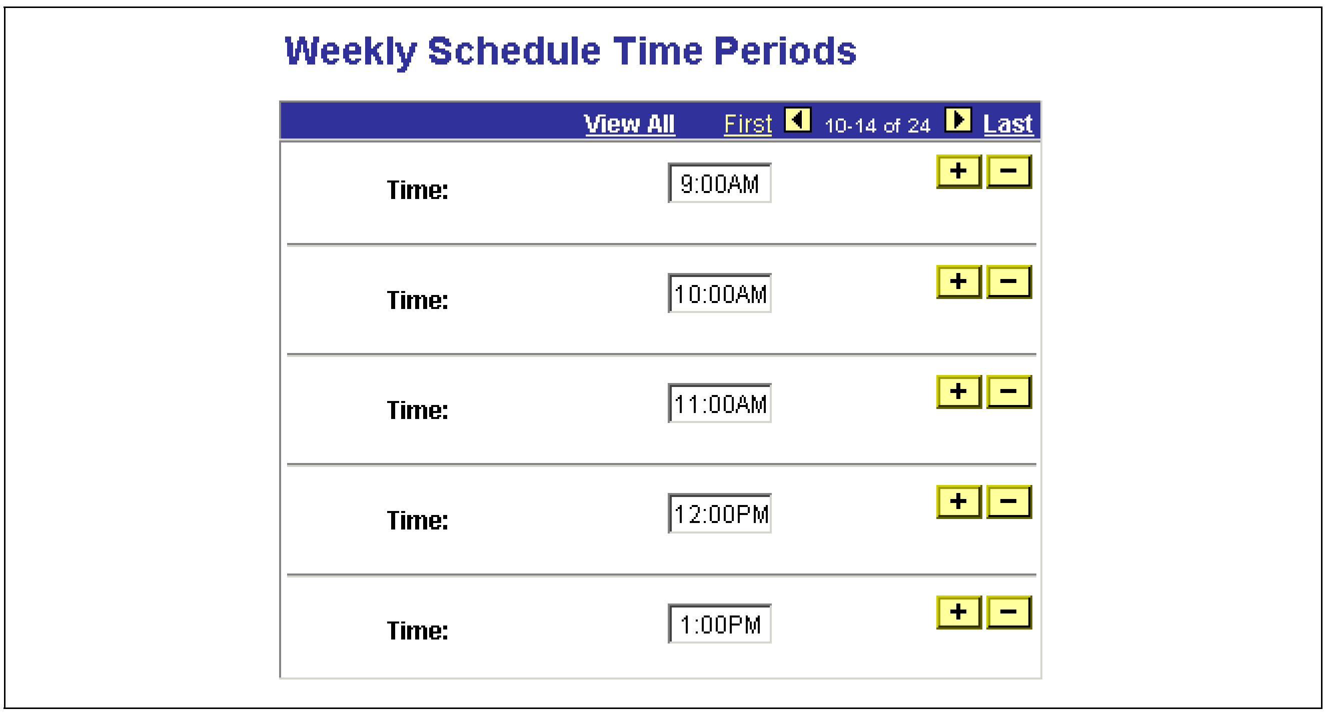
Before instructors can view their weekly schedules, you must define time periods that control the way the system displays information. You define time periods on the Weekly Schedule Time Periods page.

Pages Used to View Instructor Weekly Schedules

Page Name	Object Name	Navigation	Usage
Weekly Schedule Time Periods	SETUP_TIME_PERIODS	Design Student Administration, Define Student Records, Setup, Weekly Schedule Time Periods, Weekly Schedule Time Periods	Define the times that define ranges of time the system displays on the Weekly Schedule page (for both instructors and students). PeopleSoft delivers a set of time periods for every hour in a 24–hour period. You can modify or add to these values to meet your business requirements (for example, you can add half-hour intervals).
Weekly Schedule	SS_WEEKLY_SCHED_IN	• SA Self Service, Learning Management, Management, View My Weekly Schedule, Weekly Schedule • SA Self Service, Learning Management, Home, Learning Management, View My Weekly Schedule	View the instructor weekly schedule.

Setting Up Weekly Schedule Time Periods

Access the Weekly Schedule Time Periods page.

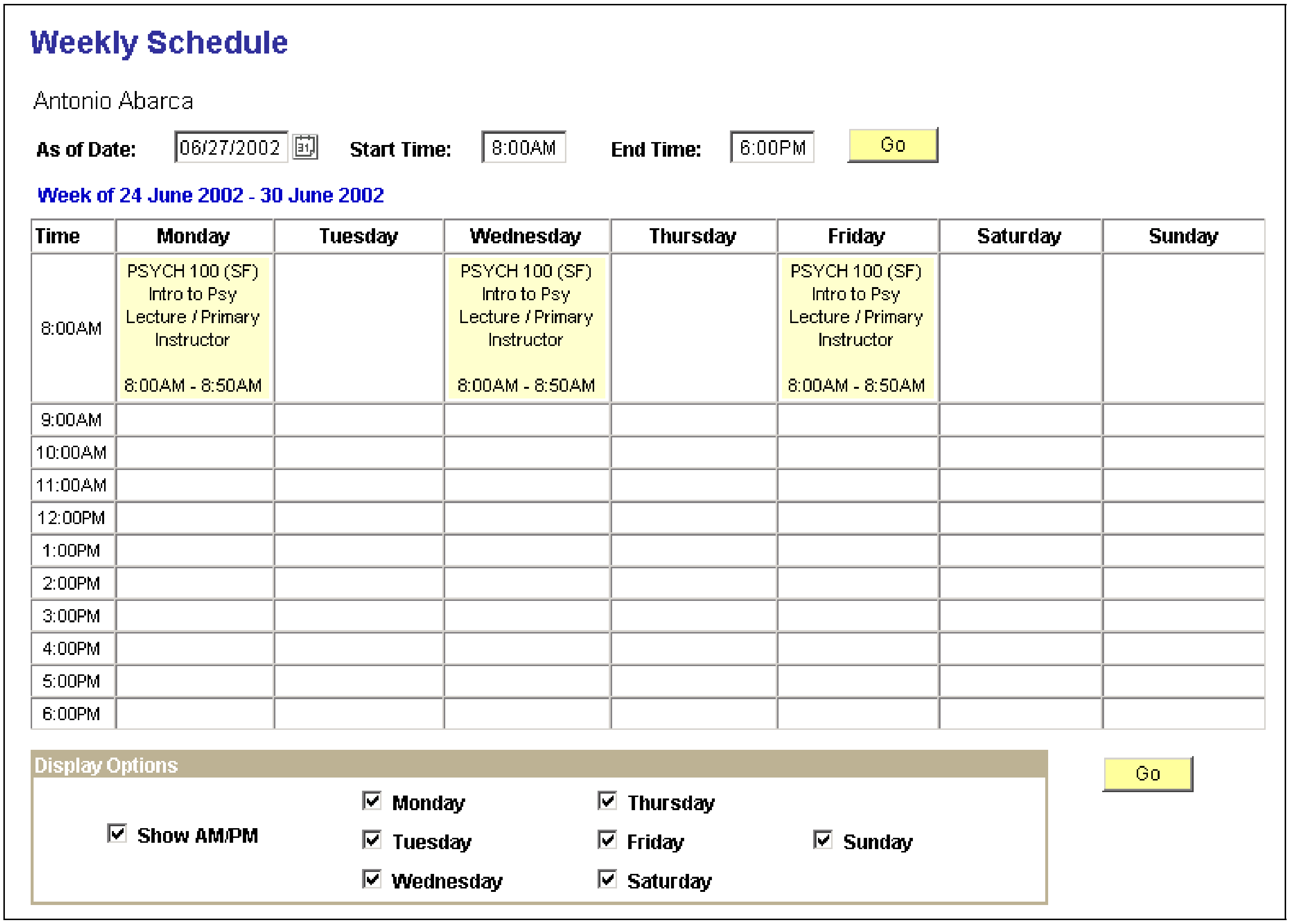


Weekly Schedule Time Periods page

Time Enter a range of time values to define the periods of time you want to display on the self-service weekly schedule. PeopleSoft delivers a set of time periods for every hour in a 24–hour period. You can modify these values.

Reviewing the Instructor Weekly Schedule

Access the Weekly Schedule page.



Weekly Schedule

Antonio Abarca

As of Date: 06/27/2002 **Start Time:** 8:00AM **End Time:** 6:00PM Go

Week of 24 June 2002 - 30 June 2002

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8:00AM	PSYCH 100 (SF) Intro to Psy Lecture / Primary Instructor 8:00AM - 8:50AM		PSYCH 100 (SF) Intro to Psy Lecture / Primary Instructor 8:00AM - 8:50AM		PSYCH 100 (SF) Intro to Psy Lecture / Primary Instructor 8:00AM - 8:50AM		
9:00AM							
10:00AM							
11:00AM							
12:00PM							
1:00PM							
2:00PM							
3:00PM							
4:00PM							
5:00PM							
6:00PM							

Display Options

Show AM/PM; Monday; Tuesday; Wednesday; Thursday; Friday; Saturday; Sunday

Go

Weekly Schedule page

Enter search parameters that define the period of time for which you want to review a weekly schedule and select display options to meet your preferences. The system populates the As of Date field to the current date by default. Click the Go button to retrieve results.

Viewing Class Facility Usage

This section discusses how to review class facility usage.

Prerequisites

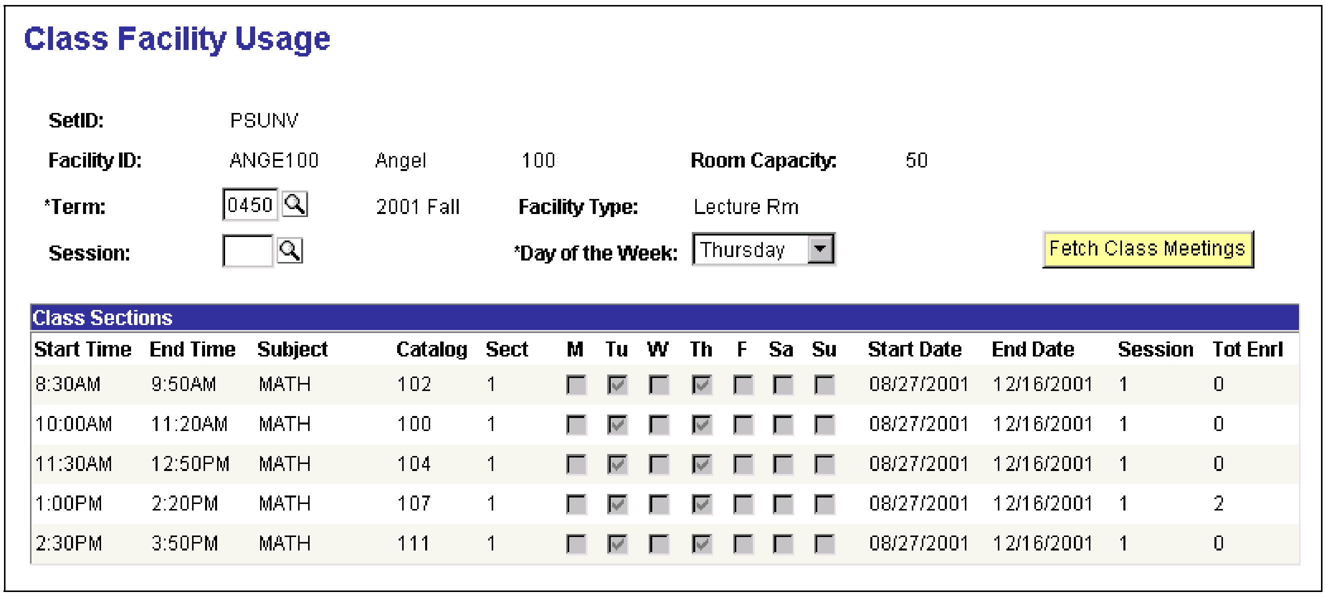
You must first assign events or classes with meeting patterns to a facility.

Pages Used to View Class Facility Usage

Page Name	Object Name	Navigation	Usage
Class Facility Usage	CLASS_MTG_PAT_DSPL	Manage Student Records, Establish Courses, Inquire, Class Facility Usage, Class Facility Usage	Review a summary of events for a term, session, and day within a facility.

Reviewing Class Facility Usage

Access the Class Facility Usage page.



Class Facility Usage page

Term, Session, and **Day of the Week** Select a term, session, and day of the week for your facility search.

Fetch Class Meetings Click to retrieve all existing event information for the parameters specified.

Searching for an Available Facility

Use the Search for a Facility component to search for available facilities when scheduling classes and non-course events, like faculty meetings.

Here's how to search for an available facility:

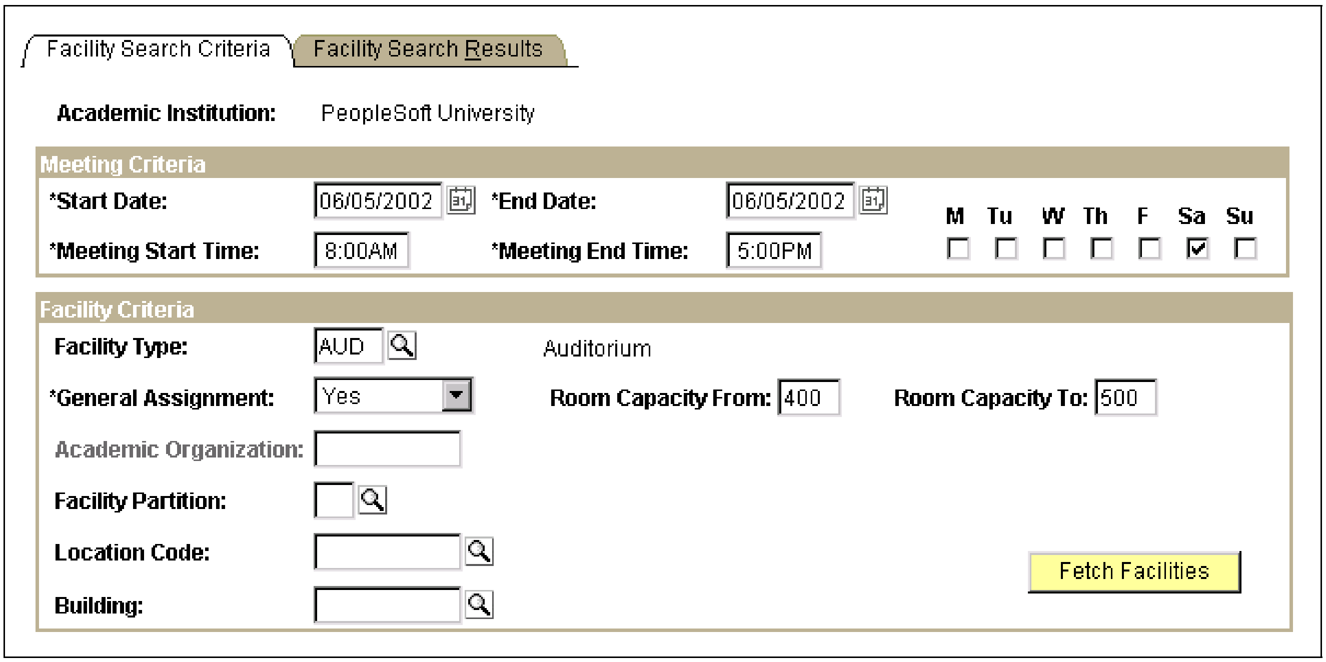
1. Access the Facility Search Criteria page, and enter search criteria as detailed as necessary.
2. Click the Fetch Facilities button to retrieve your results.
3. Review your results on the Facility Search Results page.

Pages Used to Search for a Facility

Page Name	Object Name	Navigation	Usage
Facility Search Criteria	FACILITY_SRCH	Manage Student Records, Establish Courses, Inquire, Search for a Facility, Facility Search Criteria	Initiate your search for an available facility.
Facility Search Results	FACILITY_SRCH_RSLT	Manage Student Records, Establish Courses, Inquire, Search for a Facility, Facility Search Results	Review the results of your search.

Creating Facility Search Criteria

Access the Facility Search Criteria page.



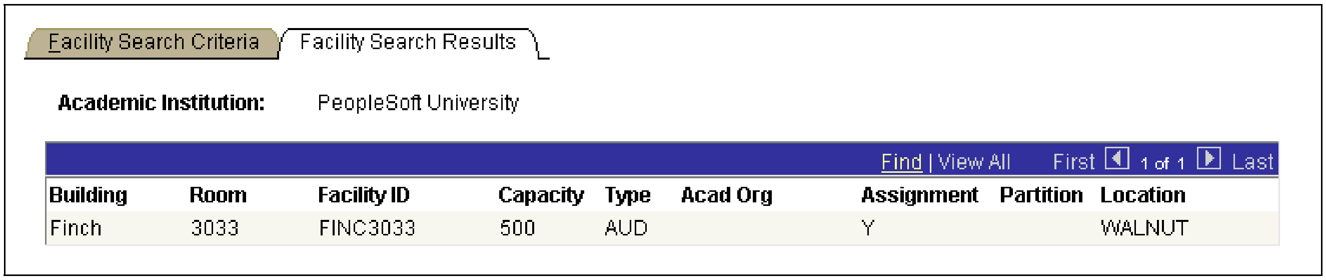
Facility Search Criteria page

Enter the criteria for your meeting in the Meeting Criteria group box. Enter any specific facility requirements you have in the Facility Criteria group box.

Click the Fetch Facilities button to retrieve a list of facilities that match your request.

Viewing Facility Search Results

Access the Facility Search Results page.



Facility Search Results page

The system lists every facility that matches your criteria. Reserve the room through event scheduling.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Tracking Event Attendance

Searching for Classes

Use the Class Search component to search for classes within a specific institution and term. The Class Search component is accessible through both the core system and the following separately licensed collaborative applications: PeopleSoft Learner Services, PeopleSoft Learning Management, and PeopleSoft Community Access.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Introducing Collaborative Applications”

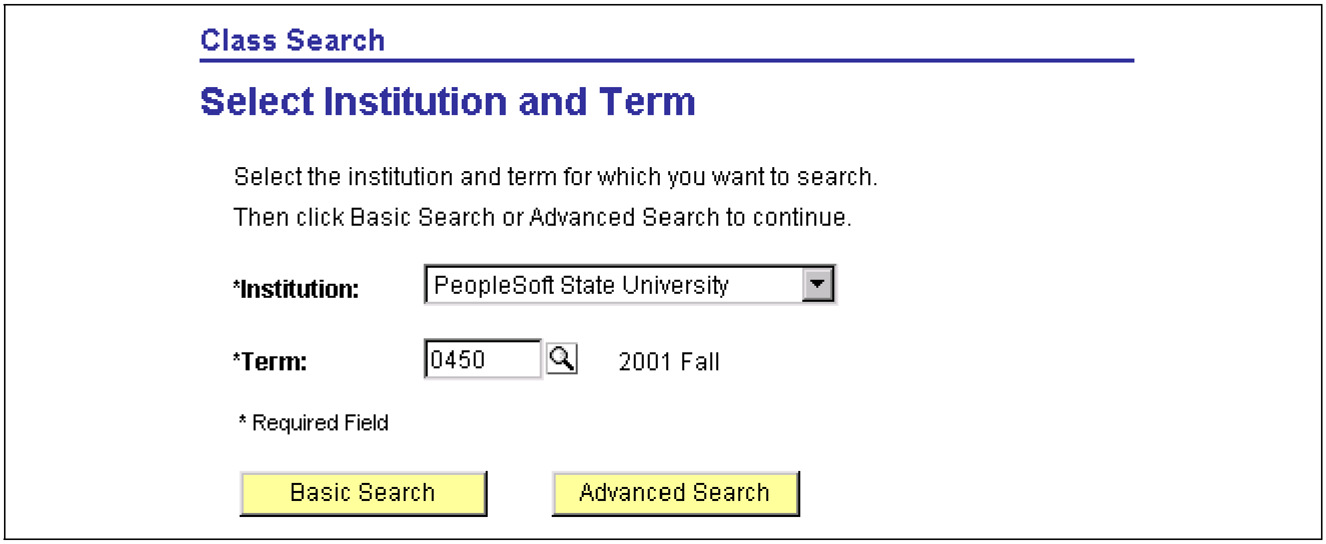
Pages Used to Search for Classes

Page Name	Object Name	Navigation	Usage
Class Search Entry	CLASS_SRCH_ENTRY	• SA Self Service, Community Access, Tasks, View Schedule of Classes • Manage Student Records, Establish Courses, Inquire, Class Search • Manage Student Records, Manage Academic Records, Inquire, Class Search • SA Self Service, Learner Services, Catalog, View Schedule of Classes • SA Self Service, Learning Management, Catalog, View Schedule of Classes	Specify the academic institution and term in which you want to search for classes.

Page Name	Object Name	Navigation	Usage
Class Search	CLASS_SRCH_BASIC, CLASS_SRCH_ADV	Click the Basic Search button or the Advanced Search button on the Class Search Entry page.	Search for classes offered during a specific term. Enter search criteria and retrieve your results. There are two views of this page, the basic search view and the advanced search view.
Class Search Results	CLASS_SRCH_RSLT	Click the Search button on the Class Search page.	Review all classes that match your search criteria. If only one class matches your criteria, the system goes directly to the Class Search Detail page.
Class Search Detail	CLASS_SRCH_DETL	Click the Detail button on the Class Search Results page, or click the Search button on the Class Search page.	Review the results of your search. This page displays the class that matches both your search parameters and the institution and term that you specify.
Class Search - Catalog Detail	CATLG_SRCH_RSLT	• Manage Student Records, Establish Courses, Inquire, Catalog Search • Manage Student Records, Manage Academic Records, Inquire, Catalog Search • SA Self Service, Community Access, Tasks, View Course Catalog • SA Self Service, Learner Services, Catalog, View Course Catalog • SA Self Service, Learning Management, Catalog, View Course Catalog	Review additional detail for a specific class.

Class Search Entry Page

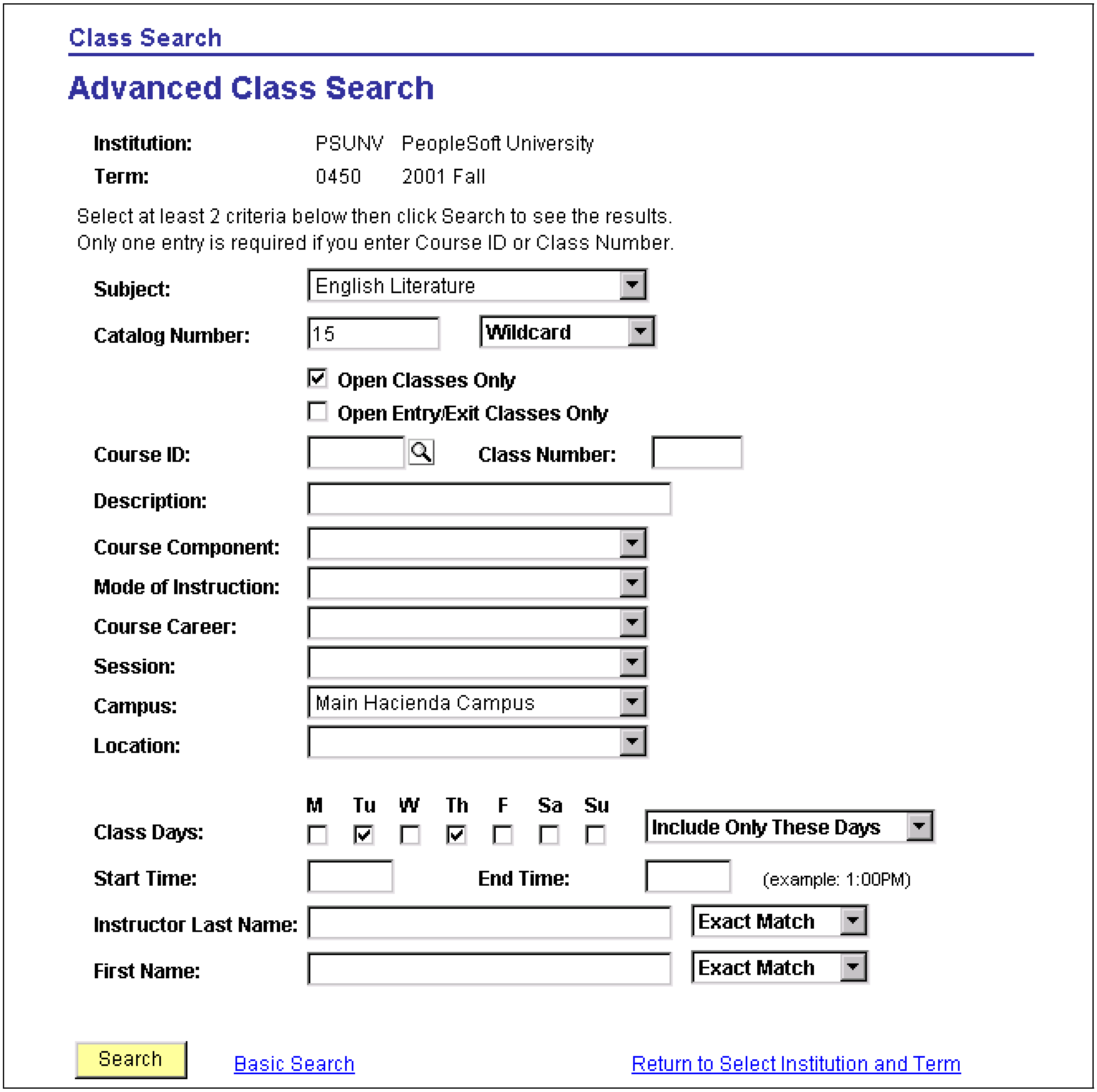
Access the Class Search Entry page.



Class Search Entry page

Class Search Page

Access the Class Search page.



Class Search

Advanced Class Search

Institution: PSUNV PeopleSoft University
Term: 0450 2001 Fall

Select at least 2 criteria below then click Search to see the results.
Only one entry is required if you enter Course ID or Class Number.

Subject: English Literature
Catalog Number: 15 Wildcard
Open Classes Only
Open Entry/Exit Classes Only
Course ID: Class Number:
Description:
Course Component:
Mode of Instruction:
Course Career:
Session:
Campus: Main Hacienda Campus
Location:
Class Days: M Tu W Th F Sa Su Include Only These Days
Start Time: End Time: (example: 1:00PM)
Instructor Last Name: Exact Match
First Name: Exact Match

Search Basic Search Return to Select Institution and Term

Class Search page

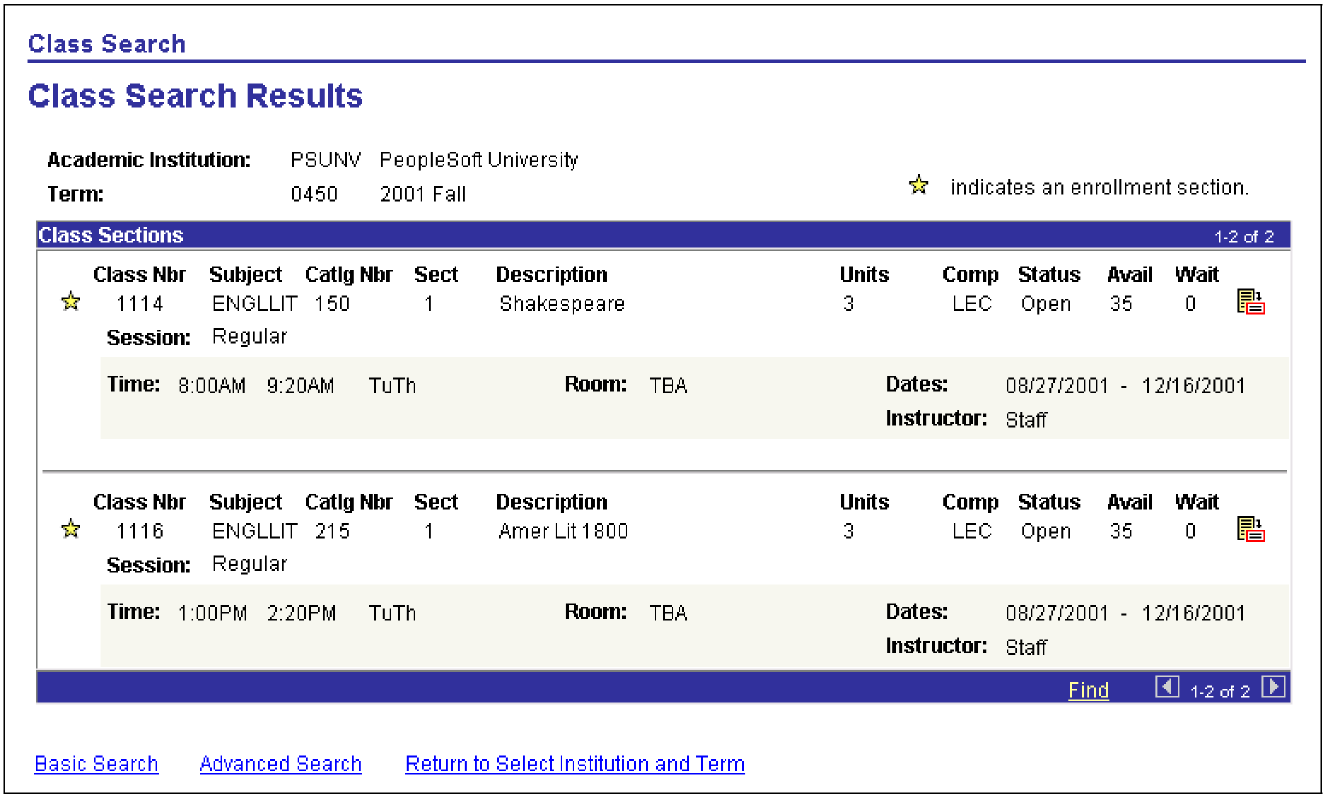
The Class Search page exhibit displays an advanced search view. If you view this page with a basic search view, many fields hide. We document fields found on both views.

Subject	The subject area of the class for which you are searching.
Catalog Number	The catalog number of the class for which you are searching.
Open Classes Only	If you select this check box, the system narrows the search to classes that are still available for enrollment.
Open Entry/Exit Classes Only	If you select this check box, the system narrows the search to classes that are offered in open entry/open exit format.

Course ID	The course ID of the class for which you are searching.
Class Number	The class number of the class for which you are searching.
Description	The description or any part thereof, of the class for which you are searching.
Course Component	The type of class component for which you are searching.
Mode of Instruction	The mode of instruction of the class for which you are searching.
Course Career	The course career of the class for which you are searching.
Session	The specific session (within the term) for which you are searching.
Campus	The campus of the class for which you are searching.
Location	The location of the class for which you are searching.
Class Days	The meeting days of the class offering for which you are searching. Specify how you want to search on class days by selecting one of four search values. You choices are: *Exclude Only These Days, Exclude Any of These Days, Include Any of These Days,* and *Include Only These Days.*
Start Time and **End Time**	The start and end time of the class for which you are searching. This is not a range. If you enter values, they must match the class start and end times exactly.
Instructor Last name	The last name of the instructor (or one of the instructors) assigned to the class. If you enter both a first and last name, the two names must be for the same instructor. Specify whether you want the search to be an *Exact Match,* or *Wildcard.*
First Name	The first name of the instructor (or one of the instructors) assigned to the class. If you enter both a first and last name, the two names must be for the same instructor. Specify whether you want the search to be an *Exact Match,* or *Wildcard.*
Search	Click this button to retrieve the class search results on the Class Search - Class Search Detail page.

Class Search Results Page

Access the Class Search Results page.



Class Search Results page

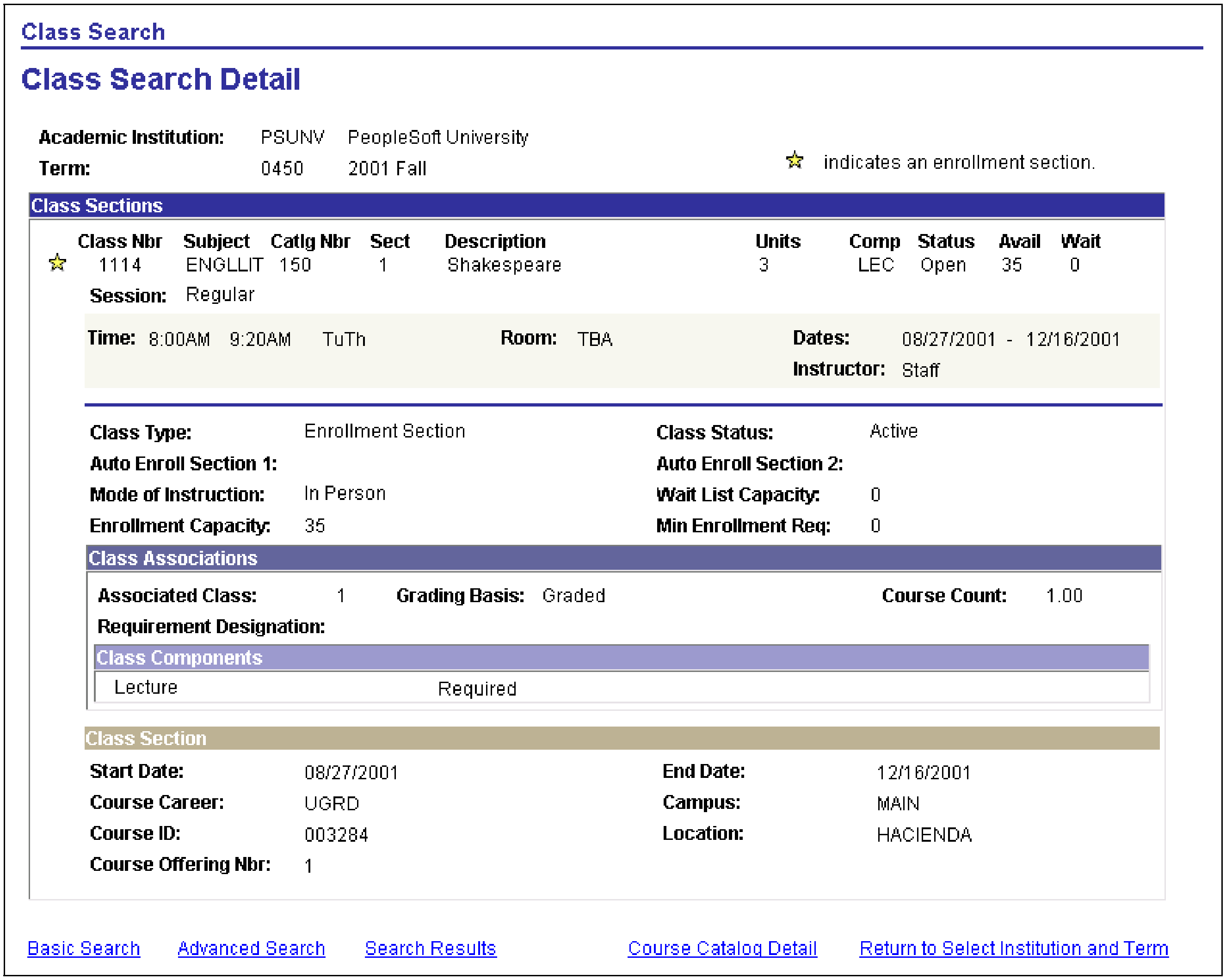
Note. The system retrieves classes in different ways, depending on the business process and collaborative application that calls the Class Search function. Through Community Access and Learner Services, the Class Search function retrieves only those classes that have the Schedule Print check box selected on the Basic Data or Class Sections page. This includes searching for classes to enroll in through the self-service enrollment feature, a component of the Learner Services collaborative application. Through Learning Management, the Class Search function retrieves all classes, regardless of the Schedule Print check box setting on the Basic Data or Class Sections page. This is so that the faculty and staff who typically use this collaborative application can view everything in the system. For faculty and staff using the Class Search function through the Learning Management collaborative application, the system displays parentheses around the class number on the Class Search Results page, to indicate that the class is set up not to display through the Learner Services and Community Access collaborative applications.

Click the Select button (if visible) to select the class on the corresponding row.

Click the Detail button to access the Class Search Detail page, where you can view additional information about the class.

Class Search Detail Page

Access the Class Search Detail page.



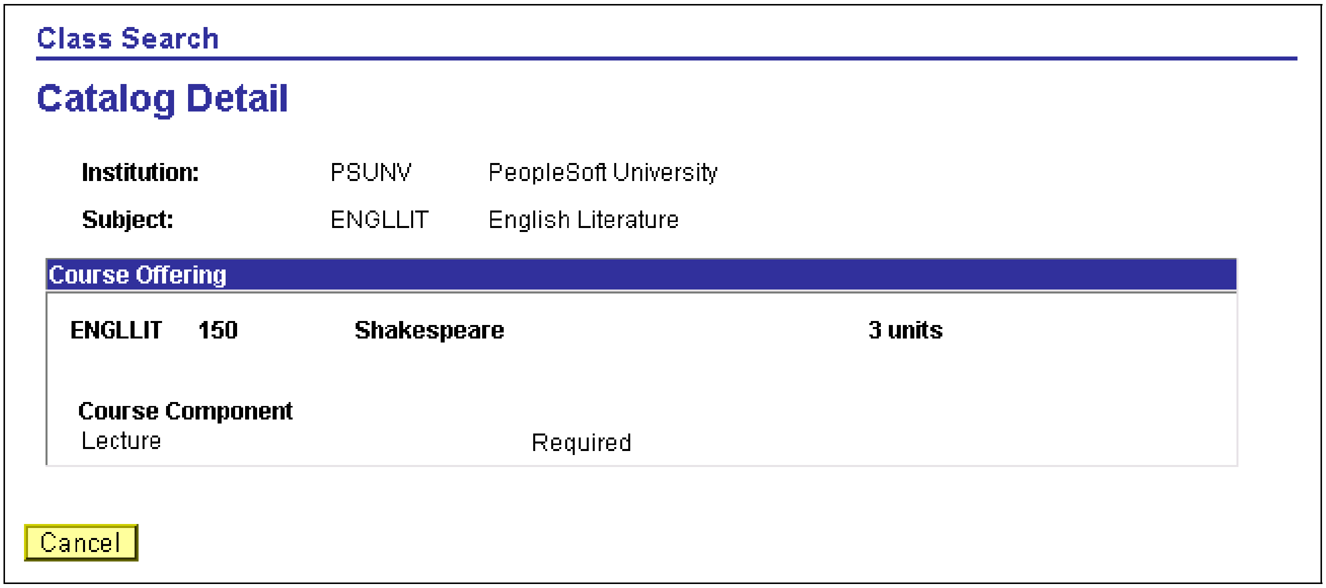
Class Search Detail page

Note. The system retrieves classes in different ways, depending on the business process and collaborative application that calls the Class Search function. Through Community Access and Learner Services, the Class Search function retrieves only those classes that have the Schedule Print check box selected on the Basic Data or Class Sections page. This includes searching for classes to enroll in through the self-service enrollment feature, a component of the Learner Services collaborative application. Through Learning Management, the Class Search function retrieves all classes, regardless of the Schedule Print check box setting on the Class Sections page. This is so that the faculty and staff who typically use this collaborative application can view everything in the system. For faculty and staff using the Class Search function through the Learning Management collaborative application, the system displays parentheses around the class number on the Class Search Results page, to indicate that the class is set up not to display through the Learner Services and Community Access collaborative applications.

Search Results	Click this link to return to the Class Search Results page.
Course Catalog Detail	Click this link to access the Class Search - Catalog Detail page, where you can to view an individual class detail record.

Class Search - Catalog Detail Page

Access the Class Search - Catalog Detail page.



Class Search - Catalog Detail page

Printing the Schedule of Classes

Use the Schedule of Classes report component to print the schedule of classes report for a term.

Here's how to print the schedule of classes report:

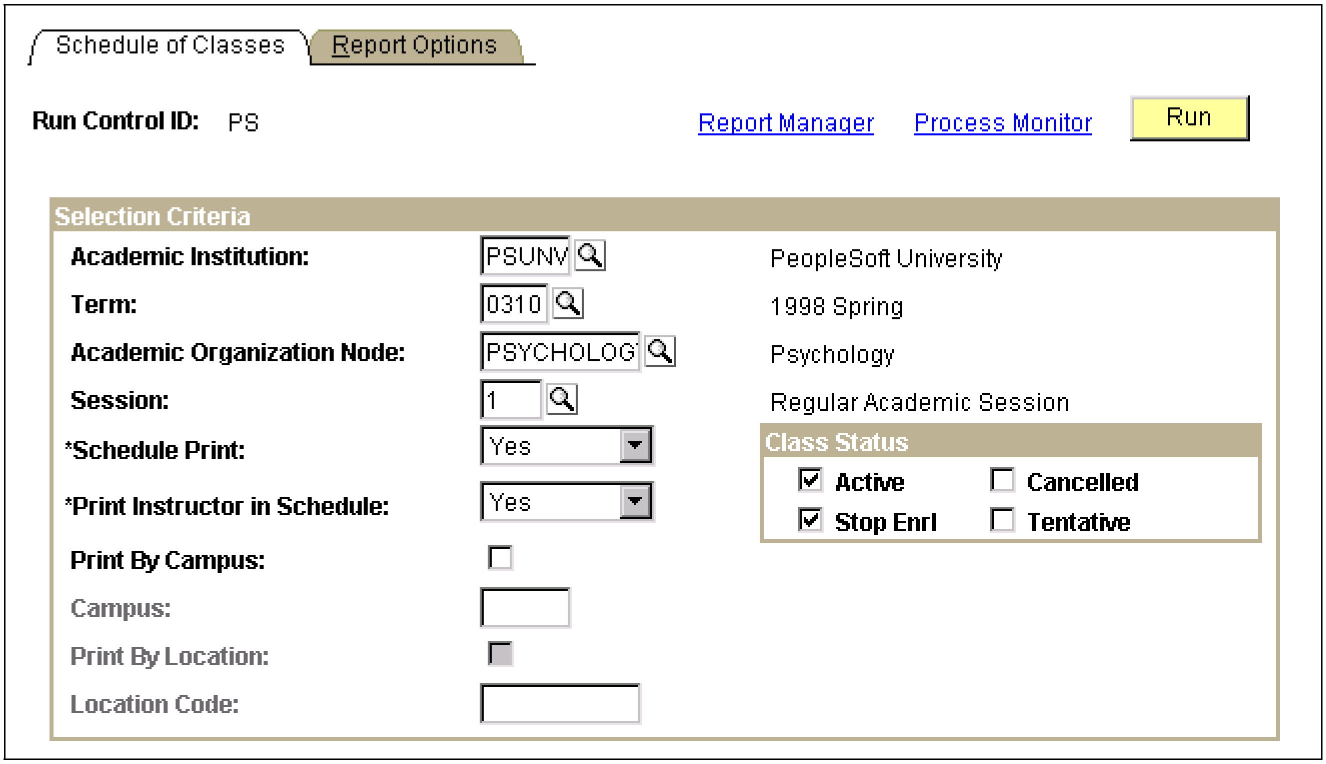
1. Access the Schedule of Classes page and enter your reporting parameters.
2. Specify additional reporting options on the Report Options page.
3. Click the Run button to run the report using PeopleSoft Process Scheduler.

Pages Used to Print the Schedule of Classes Report

Page Name	Object Name	Navigation	Usage
Schedule of Classes	RUNCTL_SRYSCHD	Manage Student Records, Establish Courses, Report, Schedule of Classes, Schedule of Classes	Specify reporting parameters for the Schedule of Classes.
Report Options	RUNCTL_SRYSCHD2	Manage Student Records, Establish Courses, Report, Schedule of Classes, Report Options	Further specify your Schedule of Classes reporting options.

Setting Schedule of Classes Report Parameters

Access the Schedule of Classes page.



Schedule of Classes page

Academic Institution
Select the academic institution for which you want to print the schedule of classes. The system populates the Academic Institution field by default from the User Defaults 1 page. You can change the value. This field is required.

Term
Select the term for which you want to print the schedule of classes. The system populates the Term field by default from the User Defaults 1 page. You can change the value. This field is required.

Academic Organization Node
Select the academic organization node for which you want to print the schedule of classes. Academic organization values are defined on the Academic Organization Table page.

Session
Select the session for which you want to print the schedule of classes. If you do not enter a specific session, the system prints the schedule for the term you specify. Session values are defined on the Session Table page.

Schedule Print
Select the schedule print value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

Yes: All classes with the Schedule Print check box selected on the Basic Data page appear on the report.

No: All classes with the Schedule Print check box cleared on the Basic Data page appear on the report.

All: All classes appear on the report, regardless of the Schedule Print check box setting on the Basic Data page.

Print Instructor in Schedule

Select this check box to determine whether the instructor's name appears on the report. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

Yes: All instructors with the Print check box selected on the Meetings page appear on the report.

No: All instructors with the Print check box cleared on the Meetings page appear on the report.

All: All instructors appear on the report, regardless of the Print check box setting on the Meetings page.

Class Status

Use the Class Status group box indicate what status of classes to print on the schedule of classes. Your choices are *Active, Cancelled, Stop Enrl,* and *Tentative.*

Print By Campus and **Campus**

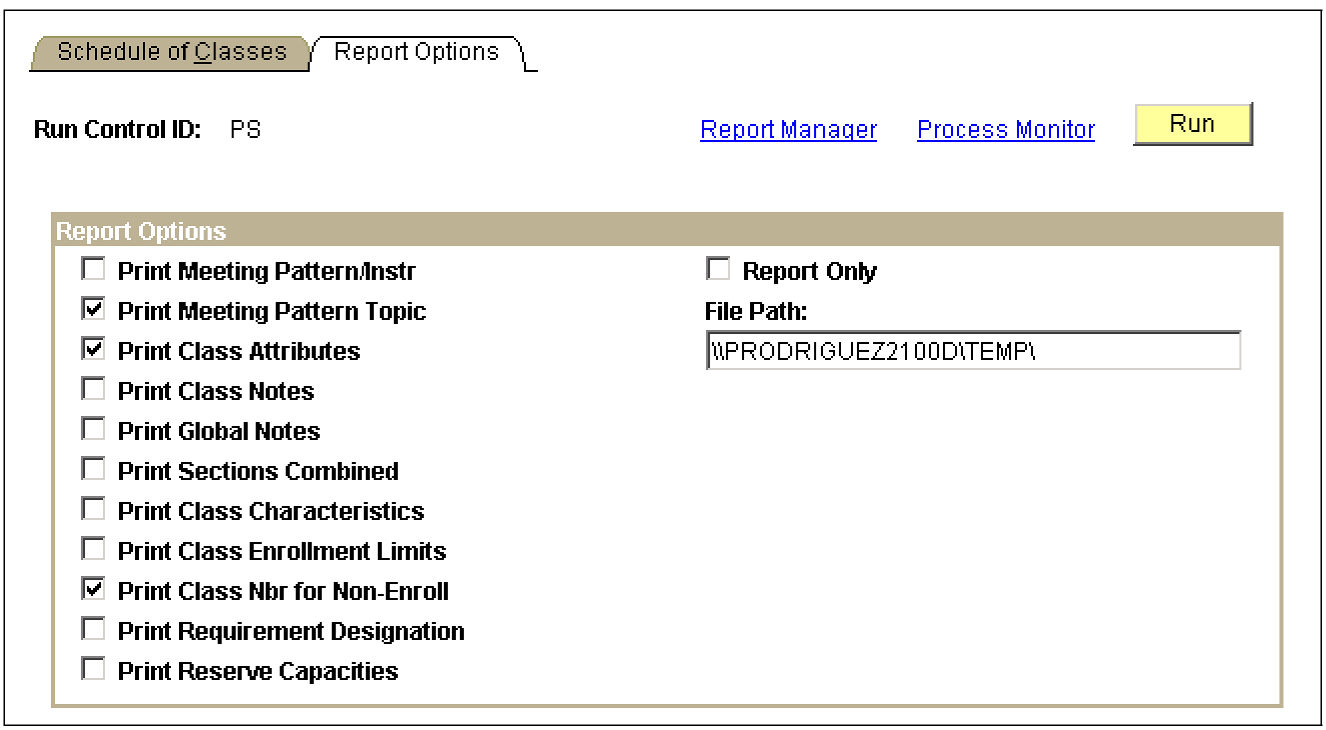
Select to print the schedule of classes based on campus rather than by class section number. Select the campus to specify a single campus.

Print By Location and **Location Code**

Select to print the schedule of classes based on location within campus, rather than by class section number. Select the location code to specify a single location.

Setting Schedule of Classes Report Options

Access the Report Options page.



Report Options page

Report Options	Set the report options to print the information that you want to display on the schedule of classes report.
Report Only	Clear this check box to specify that you want to create a Schedule of Classes report and send the Schedule of Classes report to your file path location in csv format. Select this check box to create a Schedule of Classes report, without creating a csv file. If you select this check box, the File Path field becomes unavailable.
File Path	In addition to sending report output for this process to a file (through setting preferences in the PeopleSoft Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate Read/Write permission. If you can not locate such a folder, consult your system administrator.

Copying the Prior Term

Use the Prior Term Copy component to copy the schedule of classes from term to term dependent upon criteria you submit and the roll down options you select.

Here's how to run the prior term copy process:

1. Access the Prior term Copy page.
2. Define your processing parameters. Specifically, define the term from which you want to copy data, and define the term to which you want to copy data.
3. Define additional information such as the academic group and subject area that you want to copy (from and to).
4. Access the Prior Term Copy 2 page.
5. Define detailed options that specify the types of classes that you want to copy.
6. Click Run to run this request. PeopleSoft Process Scheduler runs the RUNCTL_SRROLL process at user-defined intervals.

Prerequisites

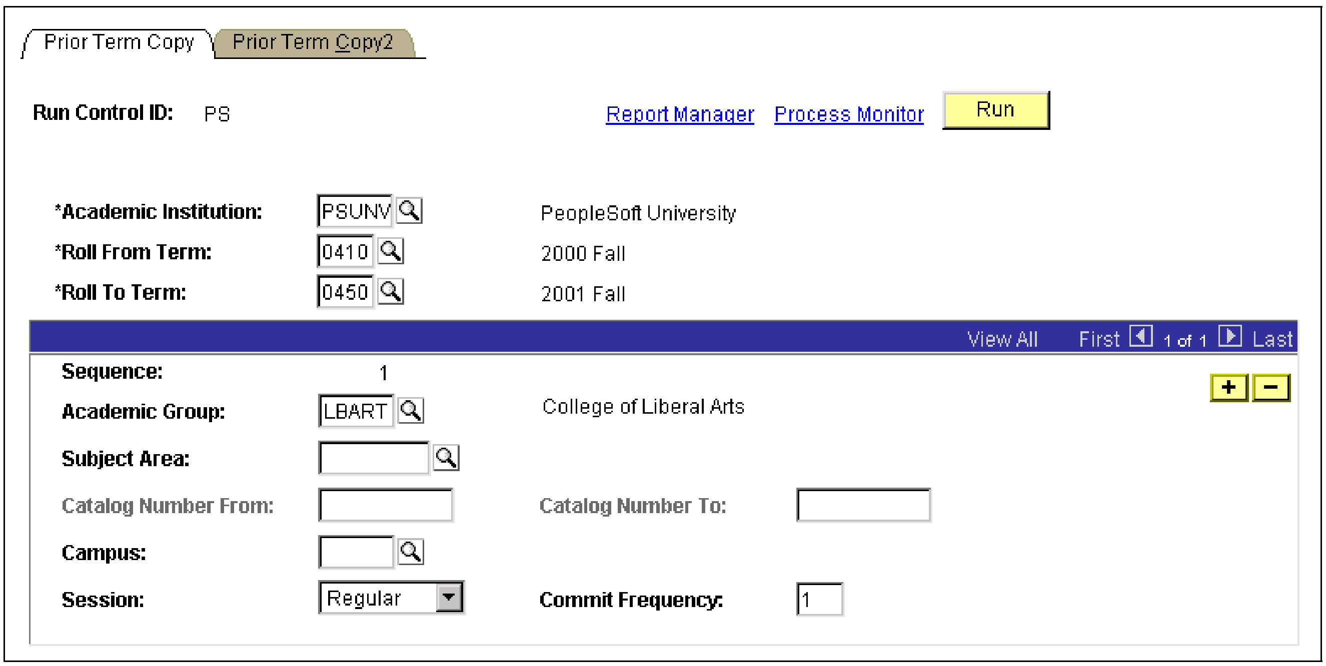
You must first define your academic institution and terms. In addition, you need to have a schedule of classes created in a prior term.

Pages Used to Copy Classes from Term to Term

Page Name	Object Name	Navigation	Usage
Prior Term Copy	RUNCTL_SRROLL	Manage Student Records, Establish Courses, Process, Prior Term Copy, Prior Term Copy	Define the criteria for copying the schedule of classes from term to term.
Prior Term Copy 2	RUNCTL_SRROLL2	Manage Student Records, Establish Courses, Process, Prior Term Copy, Prior Term Copy2	Define additional class status and roll options for the process.

Defining Criteria for the Prior Term Copy Process

Access the Prior Term Copy page.



Prior Term Copy page

Academic Institution Select the academic institution for which you want to copy schedule of classes data.

Roll From Term The term from which you want to copy classes (the source term).

Roll To Term The term to which you want to copy classes (the target term).

Sequence The system populates this field to *1* by default, and increments by 1 for each row that you add. This value is for internal processing purposes only.

Academic Group Enter an academic group to narrow down classes that you want to copy.

Subject Area, Catalog Number From, and **Catalog Number To** — Enter a subject area to narrow down classes that you want to copy. If you select a subject area, you have the option of specifying a range of catalog numbers. The system does not require you to select a subject area. If you do not select a subject area, the Catalog Number fields are unavailable for entry.

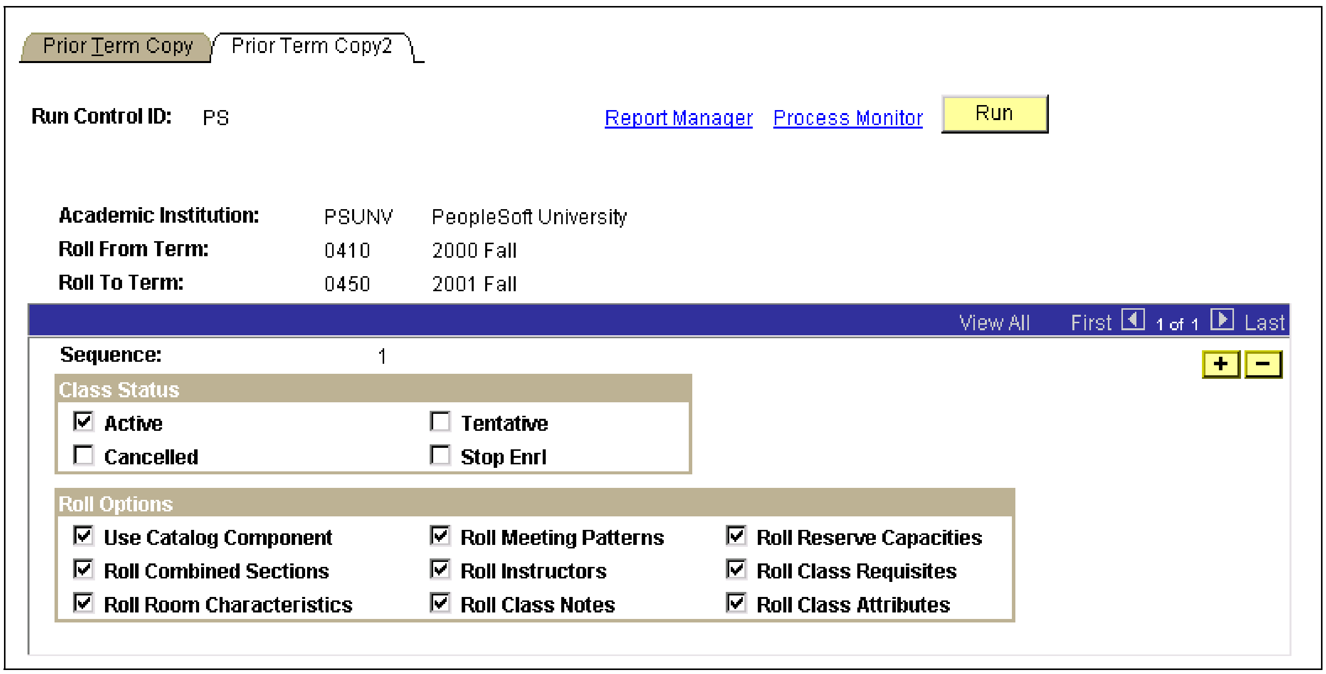
Campus — Enter a campus to narrow down classes that you want to copy. This field is optional.

Session — Enter a session to narrow down classes that you want to copy. This field is optional.

Commit Frequency — The system populates this field to *1* by default. The lower the commit frequency, the better concurrence of data. While the higher the commit frequency enables faster processing of the job, the job could get tied up with another process. We recommend that you leave the commit frequency at *1*.

Selecting Options for the Prior Term Copy Process

Access the Prior Term Copy2 page.



Prior Term Copy2 page

Class Status

Use the Class Status group box to indicate the status for classes that you want to copy. Your choices are *Active, Cancelled, Tentative,* and *Stop Enrl.* Each of these values corresponds to the class status value on the Enrollment Cntrl (enrollment control) page.

Roll Options

Specify the type of information that you want to copy by selecting the appropriate roll options.

Use Catalog Component	Select this check box to validate against the course catalog and only roll those sections to the new term that are valid components of the course as defined in the course catalog. If you do not select this check box, the system copies all sections to the new term, regardless of the component designation. **Note.** If a Dynamic Class Date Rule is associated with a class, you can still use the Prior Term Copy process by selecting the Use Catalog Component check box because the rule rolls from the course catalog. However, in order to calculate deadline dates, you must run the Dynamic Class Dates process within the copy to term .
Roll Combined Sections	Select this check box to roll combined sections that are designated as a permanent combination (on the Combined Sections page) to the new term.

The remaining options are self-evident.

Note. If your institution uses the Instructor Workload feature, you should follow the prior term copy process with the Workload Copy/Update process using the same Roll From and Roll To terms. This final step ensures that the process creates Term Workload records for all copied Schedule of Classes data.

Clearing the Resource Queue Table

This section provides an overview of the resource queue table and discusses how to remove rows from the resource queue table when systemwide or local client workstation errors cause a row to remain in the table during the class scheduling process.

Understanding the Resource Queue Table

For organizations that schedule classes with facility conflict checking activated, the resource queue table is a useful feature that prevents users from double booking facilities. When a user begins the class scheduling process, the system inserts a row in the resource queue table (via a COBOL program). This row signifies that someone within the organization is currently scheduling facilities. If another user attempts to reserve a facility, the system will present them with a message that resources are currently being allocated to another process and they must wait.

For example, “The resource you are trying to schedule is currently in use. Try your save again. If after 3 attempts you still cannot save, contact your system administrator.”

When the scheduling process completes, the row is removed from the Resource Queue table.

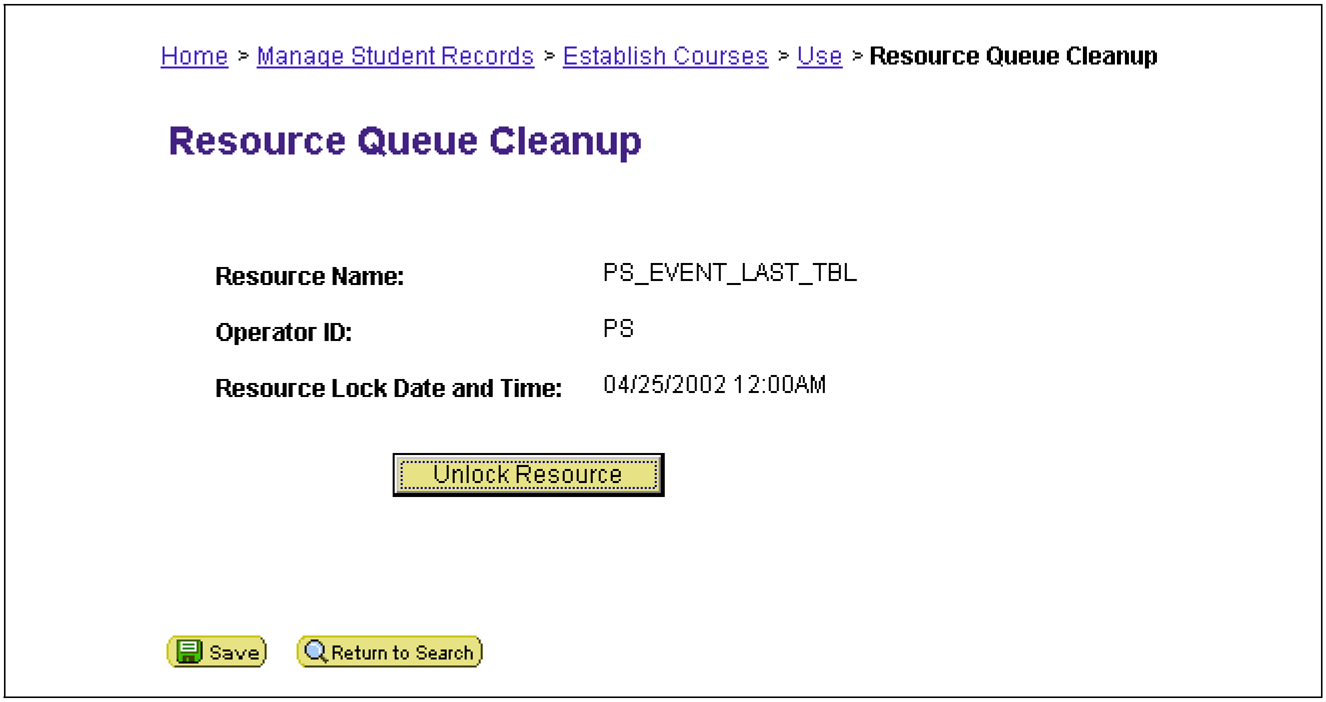
On occasion, systemwide or local client workstation errors may cause the row to remain in the table, thereby preventing the scheduling of classes. The Resource Queue Cleanup page was designed with this in mind. It is a powerful page, to be used by individuals at the system administrator level. The system administrator can simply click the Unlock Resource button on the Resource Queue Cleanup page, confirm their selection on the secondary page, and free up the resource.

Pages Used to Clear the Resource Queue Table

Page Name	Object Name	Navigation	Usage
Resource Queue Cleanup	RESOURCE_QUEUE	Manage Student Records, Establish Courses, Use, Resource Queue Cleanup	Unlock a facility resource.

Clearing the Resource Queue

Access the Resource Queue Cleanup page.



Resource Queue Cleanup

Unlock Resource Click to unlock the resource.

CHAPTER 18

Tracking Instructor Workload

This chapter provides an overview of the processes and reports that you can use to track instructor workload, and discusses how to:

- View and update workload data.
- Use the workload copy and update process.

See Also

Chapter 6, "Setting Up Instructor Workload," page 139

Understanding Instructor Workload

Higher-education institutions, particularly community colleges, need to set maximum limits on the workload assigned to the faculty and other individuals. These institutions also need to track and report actual workload assignments. To accommodate these needs, PeopleSoft Student Records has a feature called Instructor Workload, which performs full-time equivalency tracking.

The Instructor Workload feature enables you to monitor the instructional and noninstructional workload for selected faculty, instructors, and staff. This feature enables you to define workload limits for groups or individuals. In addition, you can define multiple types of instructional and noninstructional work assignments, using different workload standards for each type of assignment. You can have separate workload upper limits for part-time and full-time individuals and can set automated controls that prevent workload assignments beyond those limits.

If you use the Instructor Workload feature, the system automatically updates full-time equivalency workload values when you enter data on the class scheduling pages. You can also use a background process to copy workload data from one term to another, to update term workload records, or to produce a simple report.

Viewing and Updating Term Workload Data

There are two primary ways to assign workload hours to an individual. You can:

- Assign noninstructional hours (such as advising) on the Term Workload page.
- Assign an instructor to a class on the Meetings page (thereby attaching the class's workload hours to the instructor).

There is a third way of assigning workload to individuals, through the Workload Copy/Update process, where instructor workload assignments are copied in batch from one term to another. The Workload Copy/Update process is described in the next section of this chapter.

Prerequisites

Before you can review and update term workload, you must:

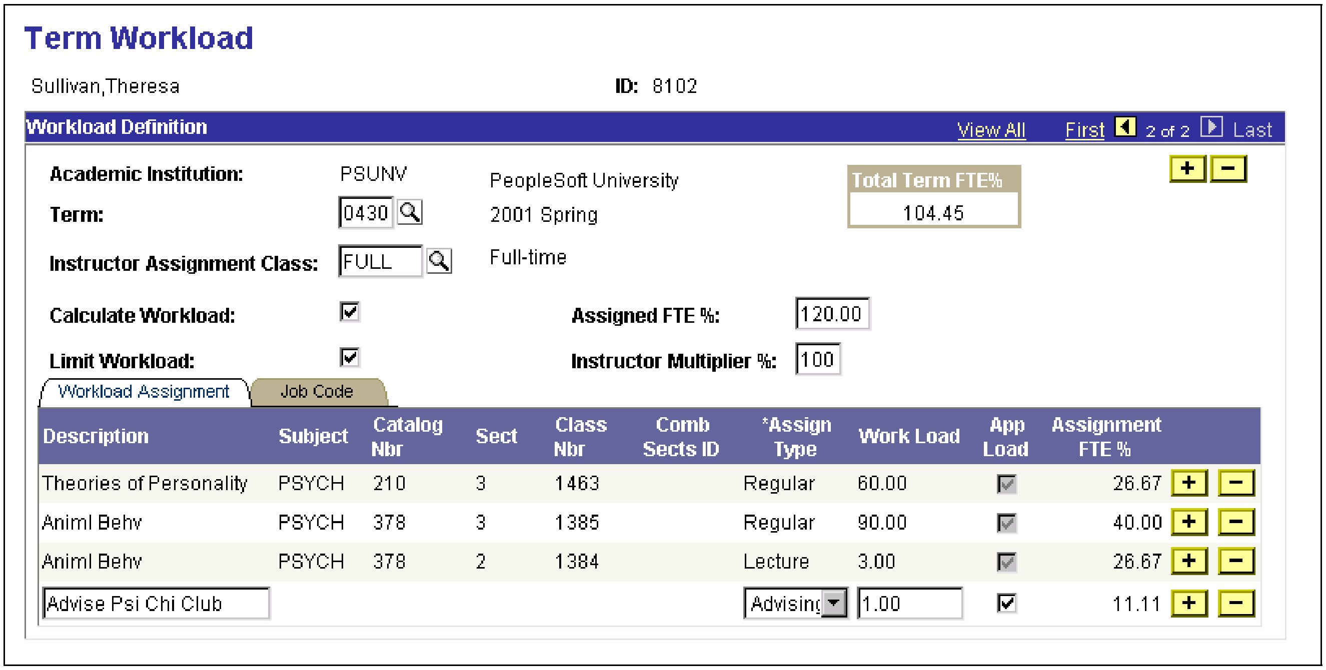
- Define instructor assignment class values for your institution on the Instructor Assignment Class page.
- Set the default instructor assignment class value for your institution on the Academic Institution Table - Academic Institution 4 page.

Pages Used to View and Update Term Workload Data

Page Name	Object Name	Navigation	Usage
Term Workload	INSTRUCTOR_TERM	Manage Student Records, Establish Courses, Use, Term Workload, Term Workload	Assign instructor values, view previously assigned term data, or manually update values.
Class Components	CLASS_ASSOC_CMPNT	Manage Student Records, Establish Courses, Use, Class Associations, Class Components	Use the Class Components page to modify aspects of class components such as grading basis, course components, and requirement designations.
Meetings	CLASS_MTG_PATTERN	• Manage Student Records, Establish Courses, Use, Schedule of Classes, Meetings • Manage Student Records, Establish Courses, Use, Schedule New Course, Meetings	Enter or view class specific workload data for instructors. If you assign an individual to a class meeting, and they are not assigned to an instructor assignment class on the Term Workload page for the term, the system uses the default instructor assignment class from the Academic Institution 4 page to create a term workload record.
Meetings	CLASS_MTG_PAT_SCTN	Manage Student Records, Establish Courses, Use, Schedule Class Meetings, Meetings	Use the Meetings page to define class meeting patterns and facilities, to link instructors to classes, and to assign instructor workload values.

Viewing and Updating an Individual’s Term Workload Data

Access the Term Workload page.



Term Workload page: Workload Assignment tab

If you want to view an individual's cumulative term FTE percentage data, add noncourse-based assignments (such as advising), or manually override a check box setting, you can reference the Term Workload page to do so.

Note. Multiple views of this page are available by selecting the tabs in the scroll area. We document fields common to all views first.

Academic Institution

Displays the institution to which this Term Workload record is attached. Individuals can have separate records for separate academic institutions.

Term

Use to enter new term workload data, or to review an existing term workload record.

Instructor Assignment Class

When you access this page in Add mode and specify a term, this field displays the appropriate effective-dated setting that you specified on the Academic Institution 4 page.

Enter an instructor assignment class value for this individual if different from the default. The Calculate Workload, Limit Workload, Assigned FTE %, and Instructor Multiplier % fields display the default settings from the Instructor Assignment Class page. You can change these settings.

Calculate Workload

Select to activate the Instructor Workload feature for this instructor or advisor in the specified term. This selection determines if the system creates term detail records at all. This selection alone does *not* control whether the feature produces a limit warning. You must select the Limit Workload check box in conjunction with the Calculate Workload check box for warnings to appear. This check box is selected by default if the Calculate Workload check box on the Instructor Assignment Class page is also selected. You can change this setting on a term-by-term basis.

Limit Workload	Select to activate the workload limit for this instructor or advisor in the specified term. This selection determines if errors and warnings are produced when assignments are made that exceed either the individual's assigned FTE percentage or the academic institution warning limits. This selection is available only if the Calculate Workload check box is selected. This check box is selected by default if the Limit Workload check box on the Instructor Assignment Class page is also selected. You can change this setting on a term-by-term basis.
Assigned FTE % (assigned full-time equivalency percentage)	Enter the assigned FTE percentage to indicate the percentage of the institution-wide standard (also known as the 100% Weekly Workload Hours field value on the Assignment Type page) to assign to this individual. By default, the system uses this field to display the same value as that set in the Assigned FTE% field on the Instructor Assignment Class page, but you can change it. For example, a value of *100.00* enables you to assign weekly workload hours to this instructor up to a total term FTE percent of 100. If you want to hold this instructor to only 80 percent of the institution-wide standard, then set the value to *80.00.* If you often overbook this instructor (perhaps only to ultimately drop him or her from an assignment at the beginning of the term), then you might want to give the system some breathing room and set this value to *120.00.* Total term FTE percent for an individual can never exceed the value specified in this field. You can change this setting on a term-by-term basis.
Instructor Multiplier %	Enter the instructor multiplier percentage to associate with this individual. By default, this field displays the same value as that set on the Instructor Assignment Class page and contributes to the default workload hours formula for courses assigned on the Meetings page. In most instances, you will probably set this field value to *100.* However, if you want to give a certain instructor double credit for the courses to which they are assigned, set this field value to *200* for the term. On the other hand, if you want someone to get only half credit for their course assignments, set this field value to *50.* In addition, you can always assign the instructor to a different instructor assignment class where this field is set to a default value of *50.* This multiplier does not apply to noncourse-based assignments made directly to the Term Workload page. You can change this setting on a term-by-term basis.
Total Term FTE % (total term full-time equivalency percentage)	Total term full-time equivalency percentage represents an individual's actual term assignment percentage. This number is the result of the assignment percentage calculation and decreases or increases automatically as you add, delete, or modify various assignments.
Description	This field has three uses: to enter assignment descriptions manually when new rows are inserted, to view a course title that is derived from assignments made on the Meetings page, or to view a combined section header description when a combined section is assigned to an instructor. **Note.** You cannot add, delete, or modify assignments made on the Meetings page.

Subject — Displays the academic subject for the course assigned (if applicable). A subject area is derived from the Course Catalog - Offerings page.

Catalog Nbr (catalog number) — Displays the value associated with this class number, if applicable. A catalog number is derived from the Course Catalog - Offerings page.

Sect (section) — Displays the value associated with this class. Section is derived from the Schedule of Classes - Basic Data page.

Class Nbr (class number) — Displays the autogenerated value associated with the course assigned, if applicable. The class number is derived from the Meetings page.

Workload Assignment Tab

See the previous exhibit for a view of this tab.

Comb Sects ID (combined sections ID) — A combined sections ID appears only when those courses assigned to an instructor comprise combined sections. The combined sections value is created on the Sections Combined Table page. The combined ID description is visible in the table on the Term Workload page.

See Chapter 17, "Managing the Schedule of Classes," Creating Combined Sections, page 396.

Assign Type (assignment type) — Use this field in one of two ways. Use it to enter assignment types manually when you insert new rows, or use it to view an assignment type that is derived from assignments made on the Meetings page. All assignment types that are effective as of the term begin date are available.

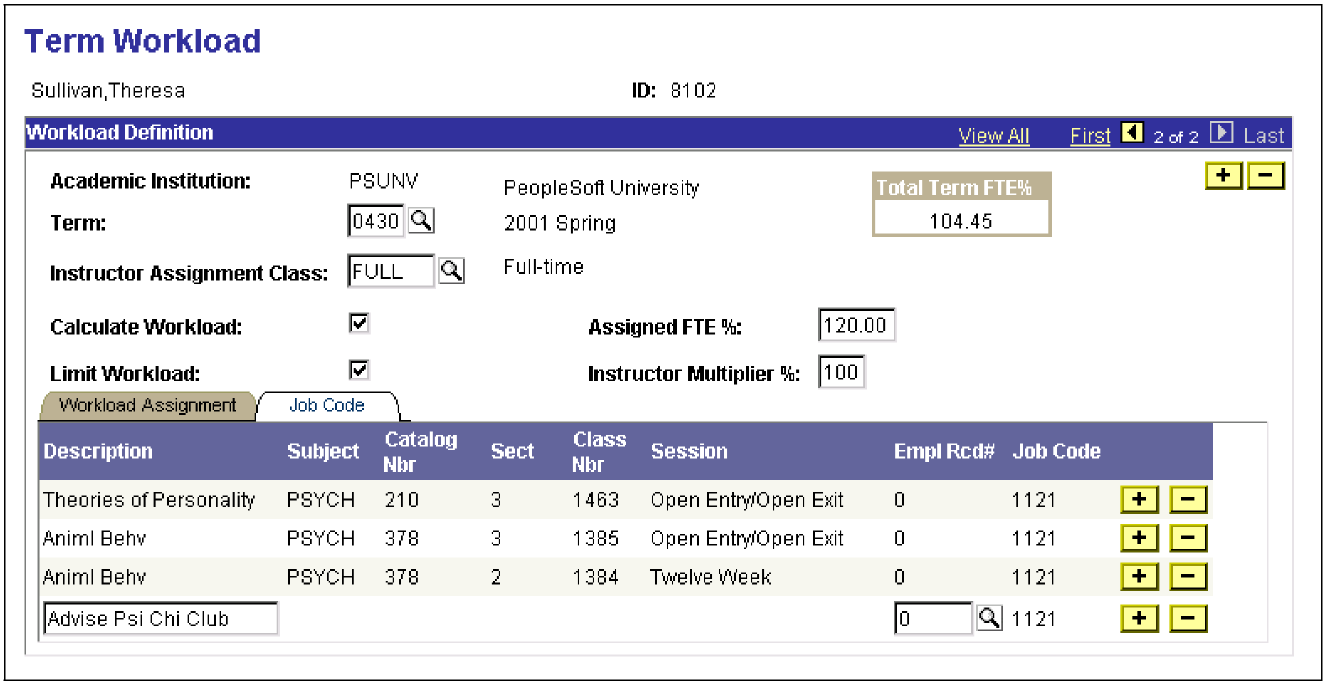
Work Load — Displays the actual workload hours. Use this field to enter workload hours manually when you insert new rows, or use it to view workload hours derived from assignments made on the Meetings page.

App Load (apply load) — This check box determines whether the assignment counts toward an individual's overall assigned full-time equivalency percentage. The App Load check box setting corresponds to the Include Assignment in Workload check box setting on the related Schedule of Classes component and cannot be changed. For manually entered assignments, it can be changed.

Assignment FTE% (assignment full-time equivalency percentage) — The assignment FTE percentage represents the particular assignment's weight based on the 100 percent weekly workload hours value (or the 100 percent OEE weekly workload hours value) for the assignment type. For example, if the 100% Weekly Workload Hours field is set to *15* on the Assignment Type page, and you assign an instructor to teach a 3-hour lecture component with the same assignment type, the assignment FTE percent equals *20* (because 3 hours out of 15 makes 20 percent). The system calculates this number and the user can not modify it.

Job Code Tab

Click the Term Workload tab.


Term Workload

Sullivan,Theresa ID: 8102

Workload Definition View All First 2 of 2 Last

Academic Institution: PSUNV PeopleSoft University

Term: 0430 2001 Spring

Total Term FTE% 104.45

Instructor Assignment Class: FULL Full-time

Calculate Workload: ☑ Assigned FTE %: 120.00

Limit Workload: ☑ Instructor Multiplier %: 100

Workload Assignment | Job Code

Description	Subject	Catalog Nbr	Sect	Class Nbr	Session	Empl Rcd#	Job Code
Theories of Personality	PSYCH	210	3	1463	Open Entry/Open Exit	0	1121
Animl Behv	PSYCH	378	3	1385	Open Entry/Open Exit	0	1121
Animl Behv	PSYCH	378	2	1384	Twelve Week	0	1121
Advise Psi Chi Club						0	1121

Term Workload page: Job Code tab

Session

Displays the session name (if applicable) and is derived from the Meetings page. Sessions are a simple way to divide a term into multiple periods for offering courses.

Empl Rcd# (employee record number)

Relates job information to instructors for reporting purposes. The system displays a warning message if the FULL_PART_TIME value on the job does not coincide with that same field value on the instructor assignment class record related to the instructor assignment class on the Term Workload page.

Job Code

Displays the value specified on the Accommodations page for a particular employee record.

Viewing and Updating Workload Values on the Meetings Page

Use the Instructors For Meeting Pattern group box on the Meetings page to enter or view workload data for instructors.

See Also

Chapter 17, "Managing the Schedule of Classes," Defining Class Meeting Patterns, page 361

Using the Workload Copy/Update Process

The Workload Copy/Update process generates a report that classifies instructors who fall into one of the following six categories:

1. Reporting full-time instructors with workload over the allowed assignment.

2. Reporting part-time instructors with workload over allowed assignment.
3. Reporting full-time instructors with workload over the warning limit.
4. Reporting part-time instructors with workload over the warning limit.
5. Reporting full-time instructors with workload under the allowed assignment.
6. Reporting part-time instructors with workload under the allowed assignment.

If you run the process with the Report Only check box selected, the process does not update any term workload values. It simply produces a report for the target term.

If you run the process with the Report Only check box cleared, all schedule of classes data from one term rolls over to another term. However, the Term Copy process alone does not roll forward term workload values. Instead, you must run the Workload Copy/Update process immediately following the Term Copy process to finish the task. This final step ensures that the process creates term workload records for all copied schedule of classes data.

Prerequisites

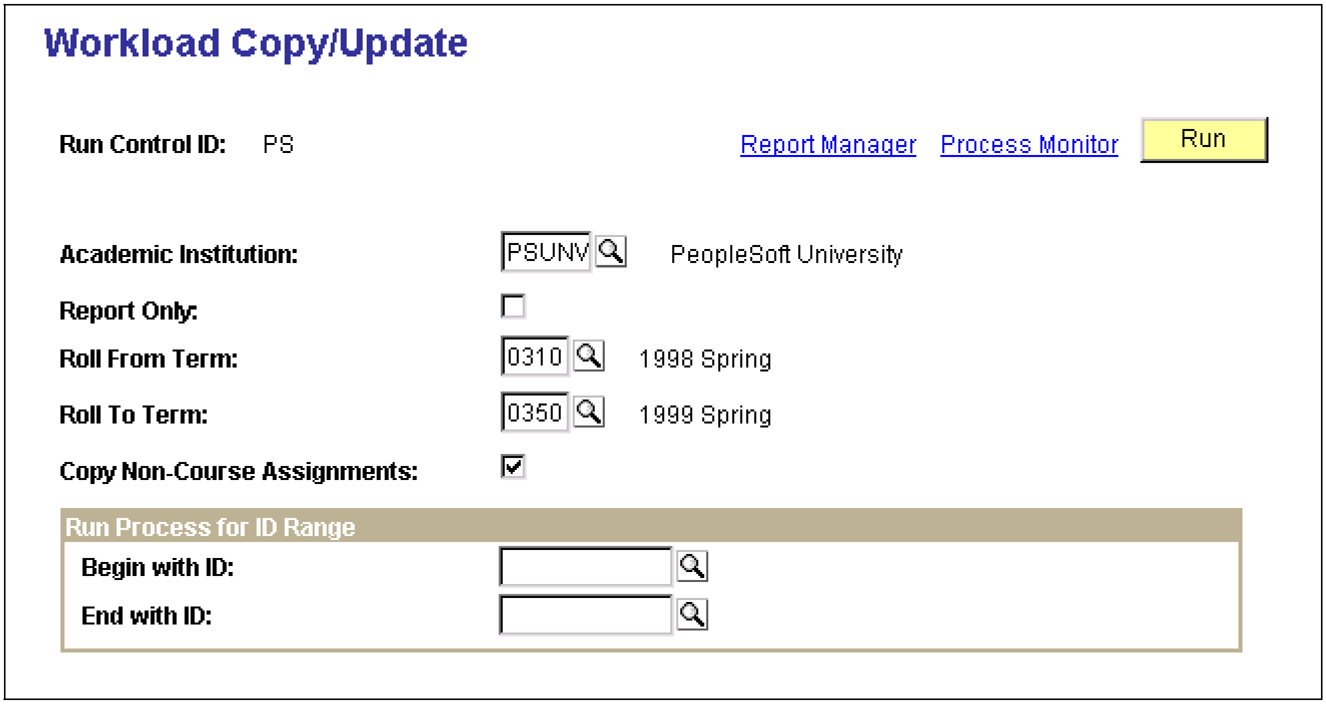
Term workload records must exist for the Roll From term.

Pages Used to Report and Update Workload Values

Page Name	Object Name	Navigation	Usage
Workload Copy/Update	RUNCTL_WORKLD	Manage Student Records, Establish Courses, Process, Workload Copy/Update	Enter report and process parameters.

Reporting and Updating Workload Values

Access the Workload Copy/Update page.



Workload Copy/Update page

Academic Institution

The institution for which you are running the process. Academic institution values are defined on the Academic Institution Table page. This field is required.

Report Only

Select to report on instructor workload and not update any values.

Report Term

Use to specify the term for which you want to report. When you select the Report Only check box, the Report Term field appears and all other fields disappear.

When you do not select the Report Only check box, the process updates or creates term workload values, or it does both.

Roll From Term

Select the term to reference as the original or source term. This should match the Roll From Term field value on the Term Copy page for the Term Copy process that you run immediately prior to the Workload Copy/Update process. When displayed, this field is required.

Roll To Term

Select the term to reference as the new or target term. This should match the Roll To Term value on the Term Copy page for the Term Copy process that you run immediately prior to the Workload Copy/Update process. When displayed, this field is required.

For example, if your institution uses both the Term Copy and Instructor Workload features, you run the Term Copy process from term X to term Y. Then you run the Workload Copy/Update process from the same term X to the same term Y. At the conclusion of this process, you can view the report to identify any individuals who might need manual adjustments.

In addition, you can run the Workload Copy/Update process both from and to the same term if needed. For example, you might originally run the Workload Copy/Update process from term X to term Y. Then, at a later date, you determine that you need to adjust some setup values that relate to the Instructor Workload feature for term Y (for example, assignment type, instructor class, or number of weeks in term or session.) You can change this data wherever necessary and then rerun the Workload Copy/Update process from term Y to term Y. This recalculates your term Y values (assignment FTE percent totals) with the newly adjusted setup values. As always, you have a newly generated report to view.

Note. The process of creating or updating To Term records references effective-dated information as of the report date (current date).

In addition, the assignment FTE percent values are not copied but are dynamically calculated according to the To Term parameters.

See Chapter 17, "Managing the Schedule of Classes," Copying the Prior Term, page 420.

Copy Non-Course Assignments Select to include assignments made directly to the Term Workload page for the specified Roll From Term field value.

Note. Should you need to run the Update Workload process more than once with the same value in the Roll to Term field, be aware of the Copy Non-Course Assignments check box and its usage. If left selected each time that the process is run to the same term, noncourse-based assignments are copied. For example, if you run the Update Workload process from fall 1999 to fall 2000, and in fall 1999, instructor A was assigned, on the Term Workload page, to advise the math club for 3 hours and, on the Schedule of Classes - Meetings page, to teach Math 100 for 3 hours, then both the 3-hour noncourse advising assignment and the Math 100 course assignment correctly roll forward to fall 2000 as 3 workload hours each. However, if you run the Update Workload process a second time from fall 1999 to fall 2000 (with the Copy Non-Course Assignments check box still selected), you add another 3-hour advising assignment to the individual's term workload record. This gives the individual a total of two advising assignments and one class assignment for a total of 9 workload hours. To prevent this type of noncourse assignment copying, during any postprimary runs of the process, you clear the Copy Non-Course Assignments check box.

Begin with ID and **End with ID** To identify a subset of individuals to process, you might want to specify begin-with-ID and end-with-ID parameters. Both of these fields are optional. These fields are not available when you select the Report Only check box. The report always displays all applicable ID's (which might include more than the range of ID's processed).

Instructor Workload Walk-Through

Now that you have familiarized yourself with all of the setup pages, walk through the following simple scenarios to help you visualize how everything is integrated. If possible, actually perform this walk through in a sample or test database. The exercise begins with references to the setup table located in the Implementing Instructor Workload Setup Tables section of this PeopleBook.

Warning! Although the conclusion of this exercise includes data clean up, there is one Term Workload record that you cannot delete. If you do not have access to a sample or test database, then use the steps below as a reference when you finally implement the feature. Do not perform this walk through in your production database.

Here's how to track instructor workload:

Define Assignment Types

First, create assignment types for at least two types of assignments. Let us begin with lecture and advising.

1. Design Student Administration, Design Academic Structure, Setup, Assignment Type, Add a New Value
2. Enter an Assignment Type of *LEC* and then the code for your institution. Click Add.
3. Enter the following sample data in the listed fields.
4. Effective Date: *01/01/1900.*
5. Status: *Active.*
6. Description: *Lecture Assignment Type.*
7. Short Description: *Lecture.* This appears in the grid on the Meetings and Term Workload pages.
8. View on Schedule of Classes: *ON.* This causes the assignment type to be an available choice on all of the Meetings pages.
9. Include Assignment in Workload: *ON.*
10. 100% Weekly Workload Hours: *9.* This causes a 3 hour assignment to be converted to 30 percent of an individual's term workload, or, this causes a 9 hour assignment to be converted to 100 percent of an individual's term workload.
11. 100% OEE Workload Hours (100 percent open entry and exit workload hours): *0.*
12. Save.
13. Design Student Administration, Design Academic Structure, Setup, Assignment Type, Add a New value
14. Enter an Assignment Type of *ADV*, and then the code for your institution. Click Add.
15. Enter the following sample data in the listed fields. Effective Date: *01/01/1900*
16. Status: *Active.*
17. Description: *Advising Assignment Type.*
18. Short Description: *Advising.* This appears in the grid *only* on the Term Workload page because you will set the next field to *OFF.*)
19. View on Schedule of Classes: *OFF*. This ensures that an assignment type of *ADV* can never be assigned on the Meetings page. Instead, you want to reserve this assignment type for association with assignments made directly on the Term Workload page.)
20. Include Assignment in Workload: *ON.*
21. 100% Weekly Workload Hours: *9.* This value means that if you want to give an instructor one course credit for advising, then you give them 3 workload hours (or whatever the institution common course count is), for advising in a given term.
22. 100% OEE Workload Hours: *0.*

23. Save.

Define Instructor Assignment Classes

Create instructor assignment class values and their corresponding defaults for two types of employees. Let us begin with Full-Time and Part-Time.

1. Design Student Administration, Design Academic Structure, Setup, Instructor Assignment Class, Add a New Value
2. Enter an Instructor Assignment Class of *FT*, and then the code for your institution. Click Add.
3. Enter the following sample data in the listed fields.
4. Effective Date: *01/01/1900.*
5. Status: *Active.*
6. Description: *Full-Time.*
7. Full/Part Time: *Full Time.*
8. Calculate Workload: *ON.*
9. Limit Workload: *ON.*
10. Assigned FTE % (assignment full-time equivalency percent): *120.00.*
11. Instructor Multiplier: *100.*
12. Save.
13. Design Student Administration, Design Academic Structure, Setup, Instructor Assignment Class, Add a New Value
14. Enter an Instructor Assignment Class of *PT,* and then the code for your institution. Click Add.
15. Enter the following sample data in the listed fields.
16. Effective Date: *01/01/1900.*
17. Status: *Active.*
18. Description: *Part-Time.*
19. Full/Part Time: *Part Time.*
20. Calculate Workload: *ON.*
21. Limit Workload: *ON.*
22. Assigned FTE %: *60.00.*
23. Instructor Multiplier: *100.*
24. Save.

Activate Workload Feature and Specify Defaults

Activate the workload feature for your institution.

1. Design Student Administration, Design Academic Structure, Setup, Academic Institution Table
2. Specify your institution; select Correct History; select Search.

3. Insert an effective-dated row with today's date.
4. Click the Academic Institution 4 tab.
5. Enter the following sample data in the listed fields.
6. Calculate Workload: *ON.*
7. Full-Time Warning Limit %: *100.00.*
8. Part-Time Warning Limit %: *50.00.*
9. Course Component Workload Hours%: *100.*
10. Academic Progress Units %: *0* (leave clear).
11. Full-Time Assigned FTE % (full-time assigned full-time equivalency percent): *120.00.*
12. Part-Time Assigned FTE % (part-time assigned full-time equivalency percent): *60.00.*
13. Assignment Type: *LEC.*
14. Instructor Class: *FT.*
15. Save.

Define Academic Subject Component Percentages

Normally, you must enter only component percentages for academic subjects at your institution that you would like multiplied as other than 100. However, just to familiarize you with the page, update the subject of *MATH* with a lecture value of 100.

1. Design Student Administration, Design Academic Structure, Setup, Academic Subject Table
2. Specify your Academic Institution and a Subject Area of *MATH;* select Correct History, select Search.
3. Click the Subject/Workload tab.
4. Enter the following sample data in the listed fields.
5. Course Component: *Lecture.*
6. Component Multiplier: *100.*
7. Save.

Define Course Catalog Workload Hours Information

Specify workload hours for a course.

1. Manage Student Records, Establish Courses, Use, Course Catalog
2. Specify your Academic Institution and a Subject Area of *MATH* if possible; select Correct History; select Search.
3. Select a course from the search results.
4. Click the Components tab.
5. Verify that a component of *lecture* exists and has a workload hours value of 3. If not, update appropriately and Save. Be sure and note any changes you make to this course for cleanup later.
6. Note the following data:

7. Course ID __________
8. Course Component __________
9. View Class Component Workload Hours Information
10. Make sure that you have the course scheduled, and that you have specified values correctly in the Workload Hrs (workload hours) field on the Class Components page.
11. Manage Student Records, Establish Courses, Use, Class Associations,
12. Specify your Academic Institution, a future or current term (if you are using a PeopleSoft sample data database, enter 0460), and the Course ID noted above. Select Correct History, select Search.
13. Click the Class Components tab.
14. Note the following data for the component:
15. Term __________
16. Associated Class Nbr __________
17. Verify that the lecture component exists, and that the corresponding workload hours read 3. With regularly scheduled classes, this defaults from the catalog. If this is not a newly scheduled class, enter a value of *3* in the Workload Hours field.
18. Save the page.
19. Now take a look at another place you can go to view or update Workload Hours data. Use the following optional menu path after a component has been scheduled for a term but later needs to be accessed for review or minor updates. The performance opening these pages is ideal because only the meeting that you need for viewing or updating is loaded.
20. Manage Student Records, Establish Courses, Use, Schedule Class Meetings
21. Enter your institution, term and course ID. Click Search.
22. Notice that this component is much smaller than that of the regular schedule of classes (only three pages). Because you are loading less data, the pages open more quickly. Note that on this page, you can make changes to the workload hours for the meeting and the assignments themselves.
23. Do not make any changes.

Define an Individual's Term Workload Information

Manage Student Records, Establish Courses, Use, Term Workload

1. Enter an ID (*Instructor A*) and code for your institution. Click Search.
2. ID__________
3. Insert a row for the same term that you used previously for the class component.
4. Enter the following sample data in the listed fields.
5. Instructor Assignment Class: change to *PT* from Academic Institution Page 4 default of *FT* and exit the field. Notice that all of the PT defaults autopopulate the check boxes and Assigned FTE % (assigned full-time equivalency percent) field. This is to show you how the check boxes and fields populate their default values. Now set your Instructor Assignment Class back to *FT.*
6. Calculate Workload: Leave with the default value from Instructor Assignment Class (*ON*)

7. Limit Workload: Leave with the default value from Instructor Assignment Class (*ON*)
8. Assigned FTE %: Do not leave as defaulting from Instructor Assignment Class (*120.00*), instead, change to *100.00*. This ensures that you never assign the instructor to more than 100 percent of the full-time standard workload (9 workload hours in this example). If you wanted some slack, for give and take during scheduling, leave this at *120.00*, or even increase it.
9. Instructor Multiplier: Change to *200.* Note that this does not double count assignments made directly to the Term Workload page.
10. Save. Do NOT exit the page.
11. Assign Noncourse Based Assignments
12. Manually assign a noncourse assignment of Advising to the previous ID (*Instructor A*).
13. Place cursor in Description field on the Workload Assignment tab and type "Advising the Math Club."
14. Enter the following sample data in the listed fields.
15. Assignment Type: *Advising.*
16. Workload: *3.*
17. Save.
18. Notice that the Assignment FTE % (assignment full-time equivalency percent) field on the Workload Assignment tab autogenerates a percentage value of 33.33 percent. This is using the formula for instructor assignments made directly to the Term Workload page. Remember, our 100 percent weekly workload hours for this assignment type are 9, therefore 3 workload hours make up 33.33 percent of the instructor's total term FTE. Also notice that this value contributes to the overall Total Term FTE percent value for instructor A. Exit this page for now. You will return to it later.

Assign Course Based Assignments

Assign instructor A to a course using the Schedule of Classes - Meetings page.

1. Manage Student Records, Establish Courses, Use, Schedule of Classes
2. Enter the same term and course ID you used in the steps above.
3. Click Search.
4. Click the Meetings tab.
5. On the Meetings - Assignment page, enter the ID for instructor A in the ID field. Exit the field.
6. Click the Workload tab.
7. Drop down the Assignment Type field and notice that you do *not* see *ADV* as a choice (because when setting up *ADV* as an assignment type, you cleared the View on Schedule of Classes check box). Set the assignment type to *Lecture.*
8. Notice that workload hours read 6. This is because you set the instructor multiplier to 200 percent, so every 3-hour assignment in this term counts as double workload hours. The *3* becomes a *6.*
9. Notice that the Assignment FTE % (assignment full-time equivalency percent) field populates and represents that this course is worth double.
10. Save.

View an Instructor's Term Workload Summary

Return to Term Workload page to view instructor A's new workload information.

1. Manage Student Records, Establish Courses, Use, Term Workload
2. Enter same ID for instructor A and code for your institution. Click Search.
3. Scroll to the term you used in steps above.
4. Looking at the page, you can now see both assignments. One made on the Term Workload page, and another just made on the Meetings page. Notice that the course assigned on the Meetings page is actually counting double toward FTE. This is because you set the default Instructor Multiplier for this instructor to 200 percent.

Assign Workload for One Class Component to Two Instructors

Now, let's decide that you want two instructors to share the responsibility of teaching the math class.

1. Return to the math class on the Schedule of Classes - Meetings page to update the assignments.
2. Manage Student Records, Establish Courses, Use, Schedule of Classes
3. Enter the same term, subject and course you used in the previous steps. Click Search.
4. Click the Meetings tab.
5. Once on the page, go down to the Instructors For Meeting Pattern group box, click the Workload tab, and change the existing load factor for instructor A from *100.00* to *50.0.* Notice changes in workload hours and assignment FTE percent.
6. Now insert another row on the workload tab and add another instructor. You will refer to this second instructor as instructor B. Alter instructor B's load factor to *50.* Remember, it is the user's responsibility to set load factor, and it is also the user's responsibility to ensure that the combined load factor for a course component equals 100, if that is what you want. In some rare instances, you might want them to equal more than 100, but this is not recommended.
7. Therefore, in looking at the grid, you have now specified that instructor A shall teach 50 percent of the class, and instructor B shall teach the other 50 percent. Load factor is a great way to split workload for a single course component across instructors, lecturers, teaching assistants and so on. Notice instructor B receives a workload default value of *1.50.* This is because you have not specified that instructor B receives double-credit or 200 percent load factor on the Term Workload page.
8. Save.

View an Instructor's Updated Term Workload Summary

Now return to the Term Workload page for instructor A. Because you have altered their load factor to 50 percent for the math course, you should notice an overall decrease in the total term FTE percent.

1. Manage Student Records, Establish Courses, Use, Term Workload
2. Enter an ID for instructor A and a code for your institution. Click Search.
3. Scroll to the term you used in the previous steps.
4. Notice that updates made to the Meetings page automatically update the Term Workload record. In addition, notice on this page that you cannot edit anything created on the Meetings page. If you want to change anything associated with an assignment made on the Meetings page, you

have to return to the Meetings page and make the change. The only assignments that you can modify on the Term Workload page are the noncourse-based assignments.

5. Do not cancel the page.

Review Warning Limits

On the Term Workload Page, let us try some of the soft and hard warnings that you created. You set up institution-wide soft warning limits and some default FTE percentage hard warning and error limits on the Academic Institution 4 page. Keep the Term Workload page open and open the Academic Institution 4 page in a new window to review your earlier work.

1. Design Student Administration, Design Academic Structure, Setup, Academic Institution Table
2. Specify your institution, select Correct History, select Search.
3. Select the Academic Institution 4 tab.
4. The page should have the following values in the listed fields:
   - Institution Wide *Soft* Warnings: These apply to all individuals where their Term Workload page has the Calculate Workload check box selected:
   - Full-Time Warning Limit %: *100.00.*
   - Part-Time Warning Limit %: *50.00.*
   - Default FTE % Values/*Hard* Warnings: These serve as defaults on the Instr Assign Class (instructor assignment class) page. You can change these each time you create a new Instructor Assignment Class. However, in order to minimize this type of change, pay special attention to the values that you enter. Try to make them as accurate as possible so that you can take full advantage of the data entry benefit this default provides:

     Full-Time Assigned FTE %: *120.00.*

     Part-Time Assigned FTE %: *60.00.*
5. Look back at instructor A's Term Workload record. Notice that they already have an assigned FTE percent value for the term. Because of this, the default full-time assigned FTE percent value on the Academic Institution 4 page can *not* be used because instructor A does not need to rely on default FTE percent values for this term. Instead, instructor A has an assigned FTE percent value of *100.* This means that instructor A can never be assigned to more than 100 percent of the full-time standard (set up as 9 hours on the Assignment Type page for both *ADV* and *LEC*).

Test the Workload Limits

Close the Academic Institution 4 page, leaving just the Term Workload page open.

1. In the same term that you have been using, manually assign instructor A to a second advising assignment worth 4 workload hours. This takes instructor A over the assigned FTE percent of *100* (or 9 hours in this example). Exit the workload hours field, attempt to save the page, and notice the hard warning or error that appears.
2. If you want to override this and save the assignment, you need to increase the assigned FTE percent. Set it to 120, and try the assignment again.
3. This time you only get the Institution wide soft warnings and can save the page.

4. Before you move on to the next test, delete the second advising row that you just inserted, and set the assigned FTE percent to *110.* Instructor A should now have two rows on the Term Workload page for this term, one for advising the Math Club and another for the math course. The total term FTE percent should be 66.66 percent.
5. Save.

Limits Elicited by Using the Meetings Page

Manage Student Records, Establish Courses, Use, Schedule of Classes

1. Enter the same term, subject and course that you used in the previous steps. Click Search.
2. Click the Meetings tab.
3. Once on the Meetings page Workload tab, go to the row in the grid for instructor A and manually type in a workload hour value of *6.5* for this math course. Exit the field and try to save.
4. You should get a soft warning that this creates a workload over the institution-wide preference, but you can save because you are not exceeding instructor A's individual assigned FTE percentage for the term. Save, but do not exit the page.
5. Now return to the workload field and change the *6.5* to *7.* Exit the field and try to save.
6. Notice that you get the hard warning and error that this exceeds instructor A's allowable assignment FTE percentage. The system does not permit you to save. The only way to override this and continue would be to navigate back to the Term Workload page for this individual and increase their assigned FTE percentage for the term.
7. Exit the page without saving.

Limits Viewed by Using the Workload Copy Report

Running the Workload Copy/Update process disregards error and warning limits so that the overall process runs successfully and completely. However, there is a follow-up report which tells you which individuals were assigned such that either their individual assigned FTE percentage or institution-wide warning limits were exceeded.

Because you know that, in the previous example, instructor A has a total term FTE percentage in excess of the institution-wide warning standard, let's run the report and see how this instructor appears on the report.

1. Manage Student Records, Establish Courses, Process, Workload Copy/Update
2. Enter a run control. Select Add a New value.
3. Select the Report Only check box and enter the term that you have been using.
4. Save.
5. Click the *Run* button, select your process scheduler parameters, and click the OK button.
6. Allow the process to complete, then click the Report Manager link.
7. Enter a process type of SQR Report, then click the Refresh button.
8. The Workload Copy and Recalc (workload copy and recalculate) report should appear in the report list. Click the View link to view the report.
9. Select the SRWRKLD.PDF file to view the report.

10. In viewing the report, you can see that the instructor A appears under the Reporting Full-Time Instructors with Workload over Warning Limit (100 percent) heading.
11. At this point, you wonder why you have sections entitled Reporting Instructors with Workload over Allowed Assignment. If there is a hard warning in the system, how could individuals ever get in this predicament? Remember what happens when you run the Workload Copy/Update process from one term to another. The process can assign workload that exceeds limits if setup values differ between terms. This is why it is imperative that you always view this report after you run the Workload Copy/Update process. If you find that any individuals have exceeded their assigned FTE percentage for the term, you can easily identify them and modify their term workload records. You can also make adjustments on the Meetings page.
12. You will not run the Workload Copy/Update process at this time. Close the report and exit the Update Workload page.

Walk Through Cleanup

Even though you are in a test database right now, before you complete this exercise, you might want to clean up all of the data you have just entered. To do so, please follow these steps:

1. Remove Instructors A and B From the Math Course
2. Manage Student Records, Establish Courses, Use, Schedule of Classes
3. Enter the same term, subject and course you used above. Click OK.
4. Once on the Meetings page, delete both rows in the grid for instructors A and B. Exit the field. Save.
5. Delete the Term Workload Records for Instructors A and B
6. Manage Student Records, Establish Courses, Use, Term Workload
7. Enter an ID for instructor A and a code for your institution. Click OK.
8. Delete appropriate term data.
9. Manage Student Records, Establish Courses, Use, Term Workload
10. Enter an ID for instructor B and a code for your institution. Click OK.
11. Delete appropriate term data.
12. Remove Workload Hours for the Math Course
13. Manage Student Records, Establish Courses, Use, Class Associations, Class Components
14. Enter the institution, term, and course that you have been using. Click OK.
15. Delete the workload hours of *3* for the lecture component. Save.
16. Manage Student Records, Establish Courses, Use, Course Catalog, Components, Correction
17. Enter the institution and course that you have been using. Click OK.
18. Delete the workload hours specified for the lecture component. Save.
19. Remove Subject Component Multiplier for the Math Course
20. Design Student Administration, Design Academic Structure, Setup, Academic Subject Table, Subject Workload
21. Enter the code for your institution and the code for the math course. Click OK.
22. Delete the row for lecture. Save.

23. Turn Off the Feature at the Institution Level
24. Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 4
25. Enter the code for your institution. Click OK.
26. Go to the row inserted with today's date. Delete this row. Save.
27. Delete Instructor Assignment Classes
28. Design Student Administration, Design Academic Structure, Setup, Instructor Assignment Class, Correction
29. Enter the instructor assignment class of *PT.* Click OK. Delete. Save.
30. Design Student Administration, Design Academic Structure, Setup, Instructor Assignment Class, Correction
31. Enter the instructor assignment class of *FT.* Click OK. Delete. Save.
32. Delete Assignment Types
33. Design Student Administration, Design Academic Structure, Setup, Assignment Type, Correction
34. Enter an assignment type of *ADV* and the code for your institution. Click OK.
35. Delete. Save.
36. Design Student Administration, Design Academic Structure, Setup, Assignment Type, Correction
37. Enter an assignment type of *LEC* and the code for your institution. Click OK.
38. Delete. Save.

Note. You cannot inactivate or delete the autocreated *NON* assignment type. Leave this value as delivered.

CHAPTER 19

Managing Students' Programs, Plans, and Subplans

This chapter provides an overview of academic program and plan activation and discusses how to:

- Manage students' academic programs, plans, and subplans.
- Understand program actions and statuses.
- Manage program actions where future enrollments exist.

Understanding Academic Program and Plan Activation

A student must be active in an academic program and plan to later be activated into a term for that academic program and plan. You can activate students into academic programs and plans by either of the following methods:

- Transmit the student's academic program and plan data through the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions, this being the usual method.
- Enter the student's academic program and plan data manually in the Student Program/Plan component.

The system stores the student's academic program and plan data on rows in the academic program table (ACAD_PROG). Collectively, all of a student's rows in the ACAD_PROG table are called the student's *program stack.* Now the individual is active in an academic program and plan and qualifies for activation into a term.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Adding and Updating Applications," Updating Applications

Maintaining Students' Program Stacks

This section discusses how to:

- Maintain a student's academic program data.
- Select a student's career requirement term.
- Maintain a student's academic plan data.
- Maintain a student's academic subplan data.

Pages Used to Manage Students' Program Stacks

Page Name	Object Name	Navigation	Usage
Student Program	STDNT_PROG	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Program	Add an academic program to a student's program stack, maintain the student's academic program record, or execute program actions that update the student's academic program record.
Career Requirement Term	STDNT_CAREER_SP	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Program, Career Requirement Term link	Select the student's career requirement term.
Student Plan	STDNT_PLAN	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Plan	Add an academic plan to a student's academic program or modify a student's existing academic plan.
Student Sub-Plan	STDNT_SUB_PLAN	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Sub-Plan	Add an academic subplan to a student's academic plan, or modify a student's existing academic subplan.

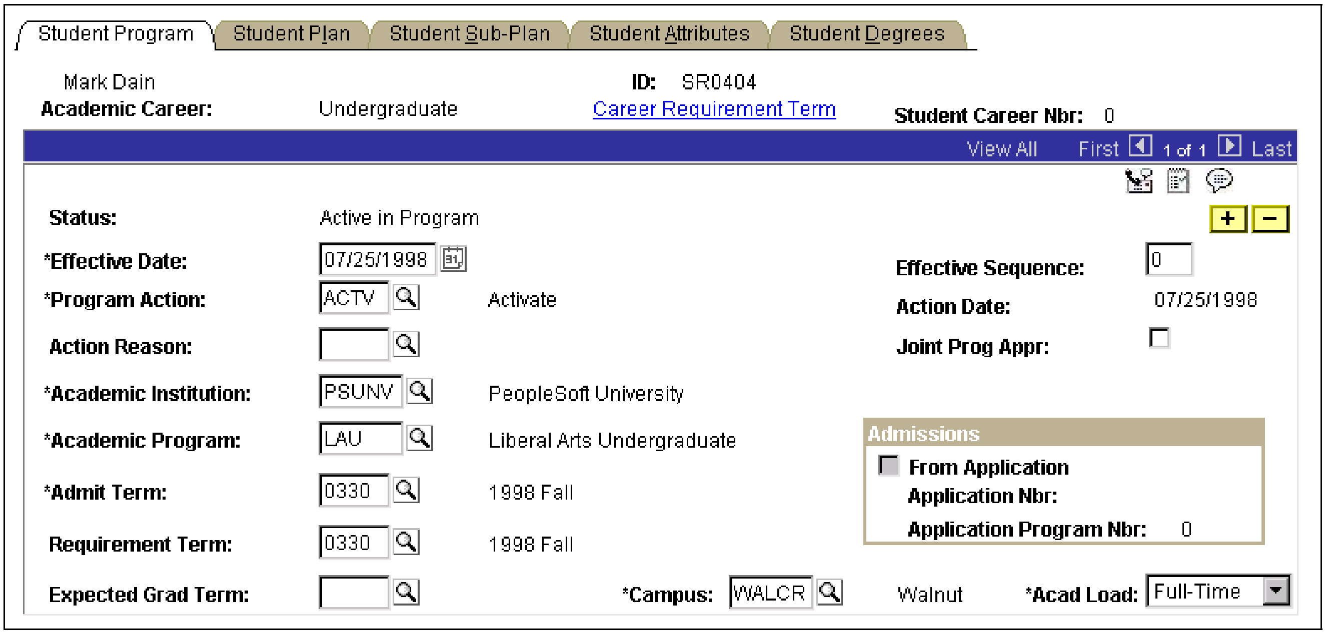
See Also

Chapter 31, "Tracking Student Data," Tracking Student Attributes, page 710

Chapter 34, "Graduating Students," Verifying and Updating Student Degree Data, page 757

Maintaining a Student's Academic Programs

Access the Student Program page.



Student Program page

Academic Career

The academic career to which the student's academic program belongs. Students can be active in multiple academic careers, either consecutively or concurrently.

Career Requirement Term

Click to access the Career Requirement Term page.

Student Career Number

Differentiates a student's multiple academic programs within the same academic career. The default value is zero. For students with multiple academic careers, you can keep the default value. For students with multiple academic programs within the same academic career, you must select a unique academic career number for each academic program that you add. The student career number zero designates the student's primary academic program within the academic career. A student's primary academic program controls the values of various fields on the student's career term record (STDNT_CAR_TERM).

Status

Indicates the high-level relationship that the student has with the academic program specified on a given row as of the effective date of the row.

Effective Date

Enter the date on which the program action and the other field values on the row becomes effective. If a term has begun and you must update a student's academic program so that the new academic program is the primary one, you must use an effective date that is prior to the term start date. The system does not recognize a program action for a term that has an effective date that is after the first day of that term. For this reason, use the current date default on program actions for future terms. If you choose to use a future effective date, select a date that comes before the start date of the impacted term.

Effective Sequence

Determines the sequencing of changes to a student's program. The system increments this number whenever you enter new effective-dated changes to a student's academic program data for a given academic career.

Program Action A change to a student's academic program data. Select the program action that you want to execute.

If a student has future enrollments and you enter certain program actions, the system displays a warning message informing you that the student is enrolled in classes after the effective date of the program action.

If the program change affects the student's primary academic program, the system resets the FA_ELIGIBILITY field on the STDNT_CAR_TERM table to the appropriate value of the newly assigned academic program, as defined in the Financial Aid Eligible field on the Program 2 page. Plus, the system selects the FA_STATS_CALC field on the STDNT_CAR_TERM table. This indicates to PeopleSoft Financial Aid that a relevant change has been made to the student's career term record and that the FA Term Build process should be rerun for the student.

Action Date The date that the program action was executed. It can be different from the effective date. The system records and displays the action date for tracking purposes.

Action Reason Indicates why a particular program action was taken or offers a further description of the program action. For example, you can record that a student withdrew from an academic program. The reason that you enter could be *Medical Reasons* or *Change of Program.* Select the reason for the program action.

Academic Institution The system automatically populates the academic institution, which refers to the academic institution that owns the student's academic program.

Academic Program Select the student's academic program. To change this value as a student changes academic programs, insert a row, select a program action of *PRGC,* and select a new value for this field.

From Application, Program Number and **Admissions Application Number** If the student's information on the ACAD_PROG table was transmitted into the table through the Activate Applications matriculation process (ABPCPPRC), the From Application check box will be selected and the system will display the admissions application number and program number.

Joint Program Approved Select to track that a student is in a dual academic program. When you select this check box the system activates the Dual Academic Program field, where you must enter the other academic program in which the student is active for this academic career.

Admit Term Determines the earliest term in which you can activate a student into a term for this academic career. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC).

If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program. When you run the Term Activation process, it validates the term in which you are activating the student against the admit term. If the admit term occurs after the activation term, you cannot complete the term activation.

Requirement Term Indicates the term in which academic advisement degree progress requirements apply to the student for this academic program. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC).

If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program.

Campus Select the campus on which the student will be active in the specified academic program.

Expected Graduation Term Select the term in which the student expects to graduate from the specified academic program. Expected graduation term is also used in financial aid need analysis.

Academic Load Select the academic load that the student will carry within the specified academic program.

See Also

Chapter 19, "Managing Students' Programs, Plans, and Subplans," Explaining Program Actions and Statuses, page 452

Chapter 19, "Managing Students' Programs, Plans, and Subplans," Managing Program Actions Where Future Enrollments Exist, page 454

Selecting a Student's Career Requirements Terms

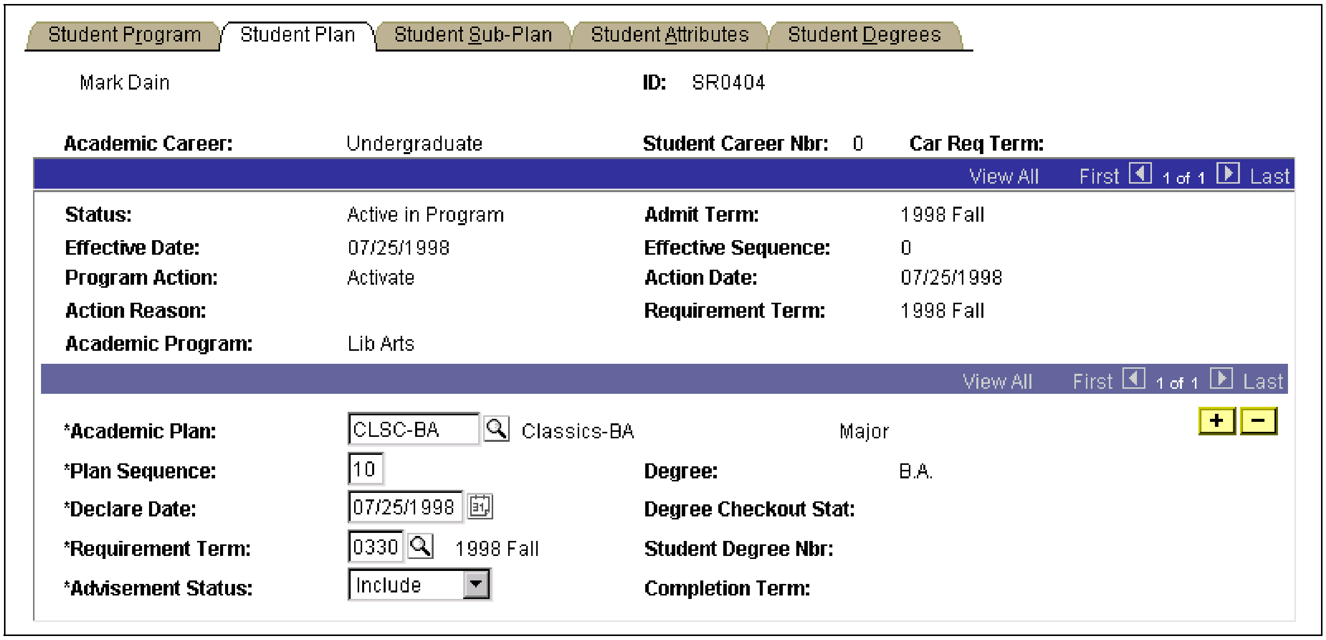
Access the Career Requirement Term page.

Academic Career The academic career for which you are defining the student's career requirement term.

Career Requirement Term Indicates the term in which academic advisement degree progress requirements apply to the student for this academic career. Select the student's career requirement term.

Maintaining a Student's Academic Plans

Access the Student Plan page.



Student Plan page

Requirement Term — Indicates the term in which academic advisement degree progress requirements apply to the student for the given academic program.

Academic Plan — A valid academic plan is required to activate a student into a term. Select the academic plan for the student. A student can have any number of academic plans within an academic program.

Plan Sequence — The sequence in which degree progress evaluates a student's academic plans. The system increments the plan sequence number each time that you add an academic plan. You can override this value.

Degree — The degree associated with the academic plan.

Declare Date — The date that the student declares the academic plan. The system, by default, displays a date equal to the effective date of the latest program action with a status of *Active in Program.* You can override this value.

Requirement Term — Indicates the term in which academic advisement degree progress requirements apply to the student for this academic plan. Select the requirement term for the academic plan.

Degree Checkout Status — The degree checkout status when you graduate the student.

Student Degree Number — The system displays this number sequentially once you complete the graduation process. This number also indicates the printing order if multiple degrees are conferred on the same date. The system prints degree information associated with the lowest number first.

Completion Term — The term that the degree requirements were met. The system displays the completion term once you've completed graduation process.

Advisement Status

Determines how the advisement engine processes the academic requirements groups that you have linked to the student's program structure. Select from the following options an academic advisement status for the student.

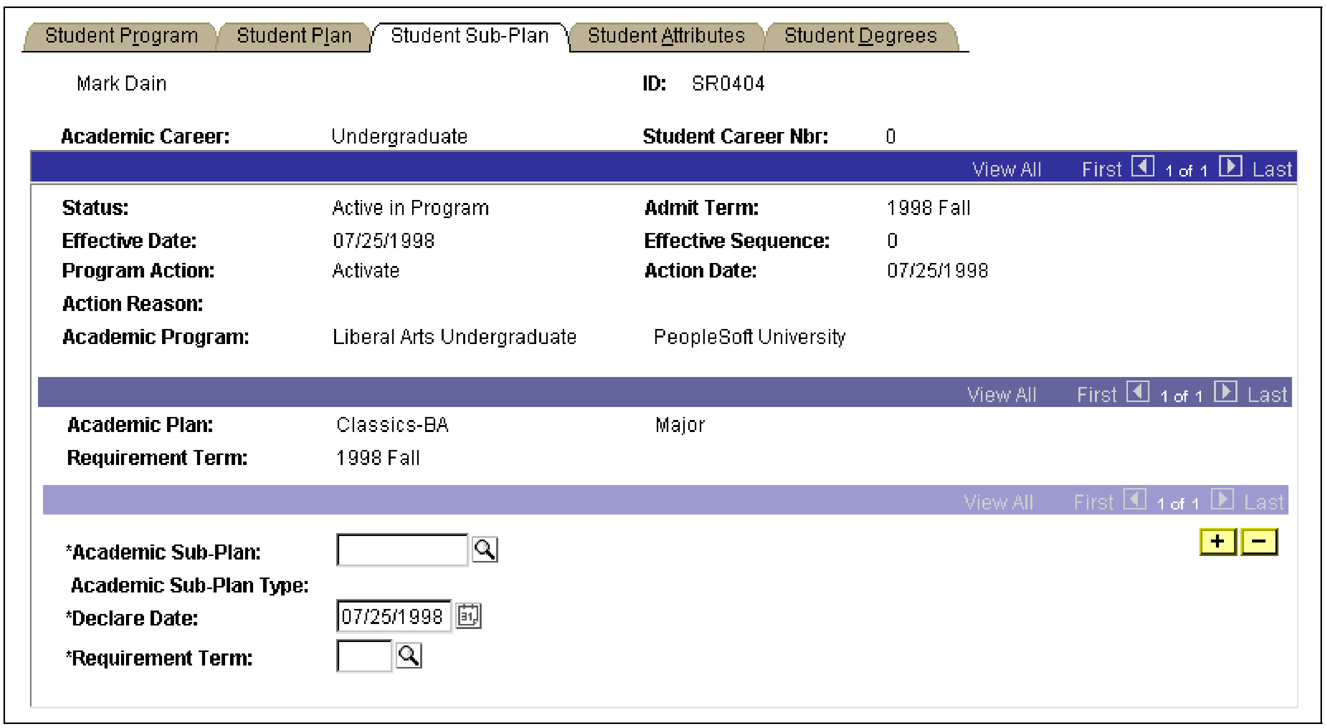
Include: Ensures that all requirement groups that match this structure are pulled into an audit.

Not Include: Ensures that all requirement groups that match this structure are not pulled into an audit.

Optional: Pulls in requirement groups that match this structure, but will *not* prevent the overall audit from going complete if unsatisfied.

Maintaining a Student's Academic Subplans

Access the Student Sub-Plan page.



Student Sub-Plan page

Academic Sub-Plan

Select the academic subplan for the student. A student can have any number of subplans within an academic plan. You can activate students into terms without the student having an academic subplan.

Academic Sub-Plan Type

When you select an academic subplan, the system displays its corresponding type.

Declare Date

The date that the student declares the academic subplan. The system, by default, displays a date equal to the effective date of the latest program action with a status of *Active in Program.* You can override this value.

Requirement Term Indicates the term in which academic advisement degree progress requirements apply to the student for this academic subplan. Select the requirement term for the academic subplan.

Explaining Program Actions and Statuses

When you select execute program actions to change a student's program data, the corresponding program action status often changes. For your reference, the program actions and program statuses relevant to PeopleSoft Student Records are explained in the following table.

Program Action Selected	Explanation	System Updates Program Status To	Additional Steps Required
ACTV (Activate)	A student is ready either to enroll in a term or to be evaluated for transfer credit.	Activate	None
WADM (Administrative Withdrawal)	A student is withdrawn for administrative reasons.	Canceled	Post the withdrawal on the student Withdrawal page.
COMP (Completion of Program)	A student has completed the program.	Program Complete	If the student is ready for graduation processing, complete the graduate process on the Student Degrees page.
DEFR (Defer Enrollment)	A person has been admitted, and may be active for one admit term, but will actually enroll in a later admit term. This action lets you change the admit term for the applicant and record that they are deferring enrollment.	The last action's program status.	None

Program Action Selected	Explanation	System Updates Program Status To	Additional Steps Required
DATA (Data Change), *PRGC* (Program Change), *PLNC* (Plan Change)	Data relative to a student's program, plan, or career status was changed.	No status effect.	When you change a student's program with one of these program actions and the start date of the new program is after the effective date of the change, the system automatically resets the Form of Study field on the student's career term record to the default value of enrollment (*ENRL*). Use the Form of Study field on the Term Activation page to specify a value other than the default.
DISM (Dismissal)	A student is dismissed from the academic institution.	Dismissed	Post the withdrawal on the student Withdrawal page.
DISC (Discontinuation)	A student discontinues attendance.	Discontinued	Post the withdrawal on the student Withdrawal page.
LEAV (Leave of Absence)	A student takes a leave of absence from his program.	Leave of Absence	None
RADM (Readmit)	A person has applied to reenter a student career and academic program for which they already have a student record.	Active in Program	When you choose this action, the Career Number field on the Admissions Application Maintenance page becomes editable. On the Application Maintenance page, you must select which student record should be populated with the readmit information if the student enrolls again. Additionally, if you enter this action, the admit type that you enter on the Application Data page must be associated with readmit processing.
RLOA (Return from Leave of Absence)	A student returns from a leave of absence.	Active	Activate the student.

Program Action Selected	Explanation	System Updates Program Status To	Additional Steps Required
REVK (Revoke Degree)	Revoke a student's degree. The system automatically updates the student degree tables. Revoked degrees do not appear on the student transcript.	Active	Activate the student.
SPND (Suspension)	A student is suspended from your academic institution.	Suspended	Post a withdrawal on the student Withdrawal page.
TRAN (Transfer to Other Career)	A student makes an inter-career transfer.	Program Completed	Activate the student in the new academic career.
ADRV (Admission Revocation)	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission.	Cancelled	None
MATR (Matriculation)	A person has completed all necessary steps to become an active student in an academic program.	Active	Activate the student into the academic program.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Updating Application Program Actions and Statuses"

Managing Program Actions Where Future Enrollments Exist

For certain program actions, if you enter the program action but the student is enrolled in classes where the start date of the term is after the effective date of that program action, the system displays a warning message because these are future enrollments. The program actions affected by future enrollments are the following:

Code	Description	Status
ADRV	Admissions Revocation	Cancelled
COMP	Completion of Program	Completed Program

Code	Description	Status
DISC	Discontinuation	Discontinued
DISM	Dismissal	Dismissed
LEAV	Leave of Absence	Leave of Absence
SPND	Suspension	Suspended
TRAN	Transfer to Other Career	Completed Program
VDIS	Voluntarily Discontinued	Discontinued
WADM	Administrative Withdrawal	Cancelled

If you receive the warning message for one of these program actions, then perform the appropriate action on the student's future class enrollments. Because each academic institution has different policies, the warning message alerts so that you can take action based on your institution's policies.

For example, if you enter a program action of *DISM* (Dismissal) and the student has registered and paid tuition for classes in the following term, your institution might require that you drop the student from the courses and issue a full refund.

Or, if you enter a program action of *COMP* (Completion of Program) and the student has registered for classes in the following term, your institution might require that you activate the student in a nondegree-seeking program by changing the student career number to the new academic program on the Term Activation page. This enables the student to continue attending the academic institution.

CHAPTER 20

Performing Batch Term Activation

This chapter discusses prerequisites and provides an overview for term activation, and discusses how to run batch term activation.

Understanding Term Activation

This section lists prerequisites and discusses term activation.

Prerequisites

Before you can activate students into a term, you must:

- Schedule classes for that term.
- Activate students into academic programs and plans for that term.

See Also

Chapter 17, "Managing the Schedule of Classes," page 349

Chapter 19, "Managing Students' Programs, Plans, and Subplans," page 445

Term Activation

Each term, activating students is a prerequisite process for enrolling students, posting transfer credit, and calculating tuition. To successfully activate a student into a term for a specific academic program, the term activation request must meet the following three criteria:

- The term must have a begin date later than or equal to the effective date of the student's academic program record.
- The term must be later than or equal to the student's admit term into the academic program.
- The term must have an academic calendar defined in the system.

You can activate the students once they have a valid academic program and plan. Term activation is the process by which you inform the system that admitted and matriculated students are eligible for enrollment, transfer credit posting to their records, and tuition calculation.

Before each enrollment period, you activate students into terms by one of the following three methods:

- Use the batch Term Activation process (SRTRMAC.SQR) to activate groups of students into terms with PeopleSoft Process Scheduler, something that you would typically do only once per term.

- Perform a quick term activation, activating students individually into academic programs and terms, using the Student Program/Plan component and the Term Activation page. You should use this method on an exception basis.

  See Chapter 21, "Performing Quick Activation," page 479.

- Use the Quick Admit component of the Quick Admit/Enroll feature, which creates a program stack row for an individual student and activates that student into a term.

  See Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511.

See Also

Chapter 21, "Performing Quick Activation," page 479

Chapter 22, "Maintaining Student Career Term Records," page 481

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511

Running Batch Term Activation

This sections discusses batch term activation, explaining how to:

- Define global exclusions.
- Define degree status rules.
- Enter required and high-level criteria for processing.
- Enter detailed criteria for processing.
- Enter enrollment lapse rules for processing.
- Enter process control options.
- Create custom populations for processing.

Understanding Batch Term Activation

While you can activate individual students, you will probably activate groups of students at one time. You'll use the Term Activation process (SRTRMAC.SQR) to target and activate specific groups of students.

Through the Term Activation setup and process components, you specify selection criteria that enable you to include and exclude students for term activation. For example, you can create rules that prevent or require activation for students with specific program actions, academic standing actions, service indicators, and degree checkout status. You can also prevent or allow activation based, for example, on student groups or academic programs. If you still need more options, you can define custom populations of students. Regardless of the options that you select, the process looks at the student's program stack to ensure that the student is active in an academic program, then it creates a row for the student in the student term table (STDNT_CAR_TERM).

After you have begun the Term Activation process (SRTRMAC.SQR) you can monitor the process, especially to see if any errors occurred. The process logs all messages to log files, which it writes to a directory on the computer (generally an application server) where the process is run. The process determines the exact location to write the log files by the FILEPREFIX variable, which is set in the SETENV.SQC. If this variable is not set, the process writes the log files to the same directory that houses the SRTRMAC.SQR program.

After you activate students into terms, you can modify certain aspects of a student's term record, including enrollment limits and terms in residence. You do so through the Term Activation component.

Global Exclusion and Degree Status Rules

The Term Activation setup component enables you to specify predefined rules, called *global exclusion rules,* that you can subsequently attach to an instance of the Term Activation process (SRTRMAC.SQR). Global exclusion rules control which students can be activated in a term through the application process. Global exclusion rules comprise of global exclusions and degree status rules. You can define multiple global exclusion rules for an academic institution, assigning each rule within an academic institution a unique identification code. Because you define your rules for an academic institution, you also have the added flexibility to create rules specific to each academic institution of a multi-institution college.

For example, your academic institution might have different term activation policies for summer terms as opposed to regular terms. In such a case, your academic institution could set up one global exclusion rule for the summer term and another for the regular term.

When you later run the Term Activation process, you can choose to include the rule in the run parameters. The Term Activation process connects the global exclusions and degree status rules of a global exclusion rule with an implied *or* between each part. Thus, as illustrated on the Global Exclusions and Degree Status Rules pages shown in this section, a global exclusion rule might read as such:

```
(UGRD/PRB2 or UGRD/PRB3) or (RADM/PET or RADM/AMN) or (RG1 or SF1/NOPAY) or ⇒
((Degree Checkout Status = APPLIED) and (Activation Term < Expected Graduation⇒
 Term))
```

Important! Global restrictions override any corresponding selections on the Term Activation process run control pages. If you attach a global exclusion rule to a run of the Term Activation process, the rule overrides any conflicting run control parameters.

Technical Aspects of the Term Activation SQR Process

Before the Term Activation process (SRTRMAC.SQR) begins, the program loads all of the selection criteria on the run control pages into memory, including the details of any global exclusion rule that you attached. If the program finds multiple rows of data from scrollable frames, it loads these values into arrays. The program enforces limits on the amount of selection criteria that you can enter on the run control pages during data entry. For example, if you insert too many rows in the Program Action Selection group box on the Selection 2 page, the program ignores any rows beyond the allowable limit and generates a message to the process log indicating that you have exceeded the allowable limit. Most of the selection criteria in the program allow up to 100 rows (arrays). You can run the Term Activation process in either the Insert run mode or Update run mode, which you specify on the Selection 1 page. The run mode determines the execution path of the program.

When you set the run mode to insert, the main program routine (or initial SELECT statement) selects against the ACAD_PROG table to identify the target population for the process run. For all of the fields on the first page except Student Group, Global Exception Rules, and Student Type, the process determines whether a student is eligible for term activation based on the values it finds for the student on the ACAD_PROG table. The process evaluates each field and constructs a dynamic WHERE clause so that only students that meet the basic criteria can even be considered for term activation.

When you set the run mode to update, the main program routine (or initial SELECT statement) selects against the STDNT_CAR_TERM table instead of the ACAD_PROG table to identify the target population of the process run. Because we are only interested in students who have an existing term row in the STDNT_CAR_TERM table, this enables the process to be much more efficient in accomplishing its task.

In both the Insert and Update run modes, the initial SELECT statement accommodates only some of the possible selection criteria that you provide. Once the primary SELECT statement identifies the students eligible for term activation, the process performs various filters on these student records to determine whether each student in this target population meets all of the specified selection criteria and global exclusions.

First, the Term Activation process (SRTRMAC.SQR) writes into memory all academic programs for which a student is *active* for the activation term. For each of a student's active programs, the Term Activation process then takes three passes at the page selection criteria, comparing this selection criteria to the values on ACAD_PROG and STDNT_CAR_TERM records for each student on a program-by-program basis to see if the student is eligible for term activation. If the student does not meet just one of the selection criteria at any point in the compare process, then the process marks the student as ineligible to enroll for that academic program, writes a message to the process log, and moves to the student's next program. For example, if the student is ineligible due to an academic standing restriction, then the process writes a message about this to the process log and moves on to the student's next program. Once the process finds one reason for the student being ineligible for term activation for the given program, it does not check for remaining inclusion and exclusion criteria. This methodology dramatically enhances the performance of the process. Once the process runs all of the edits against all of a student's active programs, it checks to see if any of these programs are still eligible for term activation. The Term Activation process can only activate a student for one program—her or his primary academic program. When a student has multiple eligible programs, the process selects the primary academic program by taking the program with the lowest STDNT_CAR_NBR and the highest EFFSEQ.

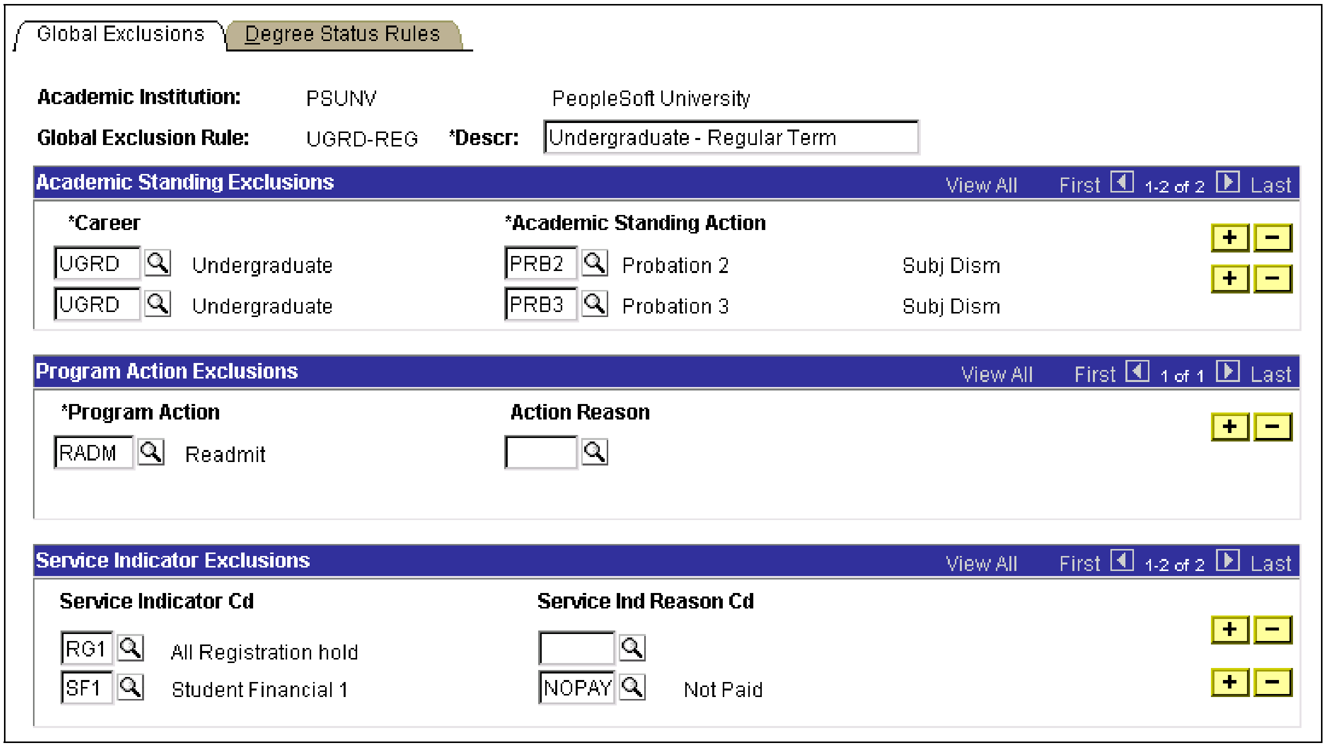
When you set the Selection Criteria field on the Selection 1 page to *Custom,* the Term Activation process executes its task through an entirely different path. In this case, the process combines the selection criteria in the component with the list of students found in the PS_TRMAC_CUST_PPLT table. We deliver this table with the application. You can populate this table by devising an SQR script or through the Custom Population page found in the Term Activation component. However you populate the table, the Term Activation process activates students for all rows in this table, provided that the student passes the referential integrity check and meets the additional page selection criteria that you selected. A key feature of the Custom option is that you can activate students for multiple terms in the same run, whereas the Page option (the alternative option) restricts you to one term per process run.

Pages Used to Run Batch Term Activation

Page Name	Object Name	Navigation	Usage
Global Exclusions	TRMAC_SETUP1	Manage Student Records, Manage Academic Records, Setup, Term Activation, Global Exclusions	Define the academic standing and program action exclusions for an academic institution's global exclusion rule.
Degree Status Rules	TRMAC_SETUP2	Manage Student Records, Manage Academic Records, Setup, Term Activation, Degree Status Rules	Define the service indicator and degree status exclusions for an academic institution's global exclusion rule.
Selection 1	RUNCNTL_TRMAC_1	Manage Student Records, Manage Academic Records, Process, Term Activation, Selection 1	Enter values for the required fields of the Term Activation process (SRTRMAC), and enter additional high-level selection criteria to narrow the population of students who qualify for term activation.
Selection 2	RUNCNTL_TRMAC_2	Manage Student Records, Manage Academic Records, Process, Term Activation, Selection 2	Enter further the students that the Term Activation process should consider as eligible for term activation for the process run.
Selection 3	RUNCNTL_TRMAC_3	Manage Student Records, Manage Academic Records, Process, Term Activation, Selection 3	Enter required enrollment terms or enrollment lapse rules for a single run of the Term Activation process.
Process Control	RUNCNTL_TRMAC_4	Manage Student Records, Manage Academic Records, Process, Term Activation, Process Control	Enter how the Term Activation process initializes or sets various values in your PeopleSoft Student Administration system.
Custom Population	RUNCNTL_TRMAC_5	Manage Student Records, Manage Academic Records, Process, Term Activation, Custom Population	Create a custom list of students to activate into terms. Or, retrieve, view, and edit an existing custom list of students.

Defining Global Exclusions

Access the Global Exclusions page.



Global Exclusions page

Academic Institution The academic institution for which the global exclusion rule applies.

Global Exclusion Rule A rule that you can define to prevent the Term Activation process from term-activating students that have certain parameters on their student career term records (STNDT_CAR_TERM table).

Academic Standing Exclusions

Career Select the academic career for which you want to exclude an academic standing action from the Term Activation process (SRTRMAC).

Academic Standing Action Select the actions (within the academic career) to exclude from the Term Activation process.

The Term Activation process connects each academic standing exclusion using an implied *Or* statement. For example, in the page above, PSUNV can use the rule to prevent undergraduates that are subject to dismissal (academic standing action equals PRB2 *or* PRB3) from being activated in regular terms.

Program Action Exclusions

Program Action Select the program action to exclude from the Term Activation process. This field prompts you with program actions only relevant to term activation.

Action Reason To exclude a program action only when a particular reason is attached to that action, select a reason. The system prompts you with only the program action reasons related to the program action. When you specify reasons, you must list all of the reasons within that program action that you want the Term Activation process to exclude.

If you want to exclude a program action regardless of the reason, leave this field blank. The Term Activation process excludes all students that have that program action and meet the other run criteria.

The Term Activation process evaluates each academic program-action/action-reason exclusion using an implied *Or* statement. Therefore, never indicate a program action/reason combination and then, for the same program action, leave this field blank. In such a case, the process excludes all actions regardless of the reason you specified. For example, if you list a program action of *RADM* with an action reason of *PET,* then add another row with an action of *RADM* and the reason left blank, the Term Activation process will ignore the first entry and assume that any student with the program action of *RADM,* independent of the reason, must be prevented from term activation.

Service Indicator Exclusions

Service Indicator Cd (service indicator code)

Select the service indicator code to exclude from the Term Activation process.

Service Indicator Reason Cd (service indicator reason code)

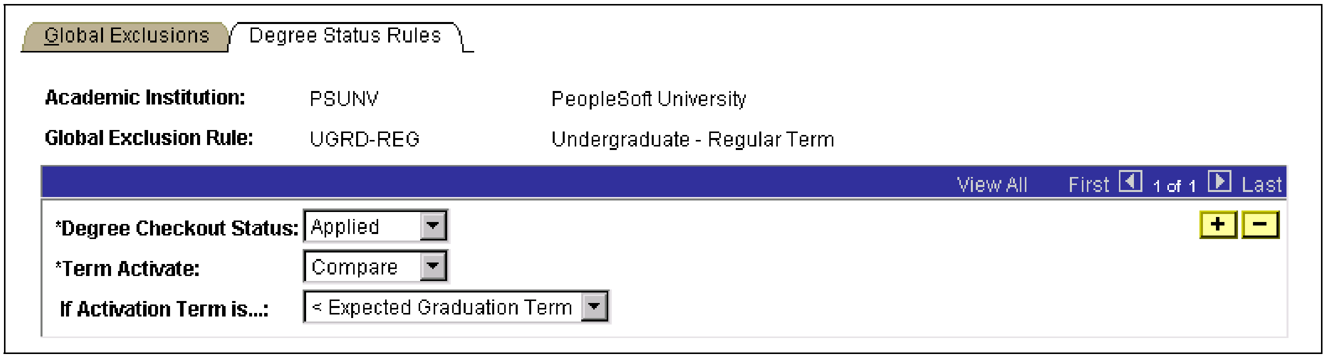
To exclude a service indicator code only when a particular reason is attached to that code, select a reason. The system prompts you with only the service indicator reasons related to the service indicator you select. When you specify a reason, you must list all of the reasons within that service indicator that you want the Term Activation process to exclude.

To exclude a service indicator regardless of the reason, leave this field blank. The Term Activation process excludes all students that have that service indicator and meet the other run criteria.

The Term Activation process evaluates each service indicator/reason exclusion using an implied *Or* statement. Therefore, never indicate a service indicator/reason combination and then, for the same service indicator, leave the reason blank. In such a case, the process excludes all reasons regardless of the one specified. For example, if you list a service indicator of *ALL* with a service indicator reason of *BILL,* then add another row with a service indicator of *ALL* and the reason left blank, the Term Activation process ignores the first entry and assumes that any student with the service indicator of *ALL,* independent of the reason, must be prevented from term activation.

Defining Degree Status Rules

Access the Degree Status Rules page.



Degree Status Rules page

This page enables you to define the students who *can* be term-activated based on their degree checkout status. You also have the option to further define the students who can be term-activated by comparing the activation term to students' expected graduation term. This page works in conjunction with the Degree Checkout Status field on the Student Degrees page in the Student Program/Plan component. If your institution maintains the Degree Checkout Status field, you can then use this functionality. If your institution does not maintain the Degree Checkout Status field, the student will always pass the degree checkout status inclusion when you run the Term Activation process (SRTRMAC).

In the example on the page above, any student who has a degree checkout status of *Applied* qualifies for term activation so long as their activation term is less than their expected graduation term.

Degree Checkout Status

Select the degree checkout status that you want the Term Activation process to either exclude or evaluate for exclusion: *Applied, Approved, Awarded, Denied, In Review,* and *Pending.* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Term Activate

Select from the following choices how you want the Term Activation process to evaluate the degree checkout status of students.

Never: Indicates that you want the Term Activation process to never term-activate students that have the degree checkout status you specified. The If Activation Term Is… field becomes unavailable to edit.

Compare: Indicates that you want the Term Activation process to determine the students that it excludes from term activation by comparing the student's activation term to the expected graduation term for students who have the degree checkout status that you specified. The If Activation Term Is… field becomes available to edit.

For example, if a student has an expected graduation term of spring 2000, you will likely want to term-activate the student for the spring 2000 term but not the fall 2000 term. You can use the Compareoption and the other Degree Status Exclusion fields to set up a run parameter to meet this need.

If Activation Term is…

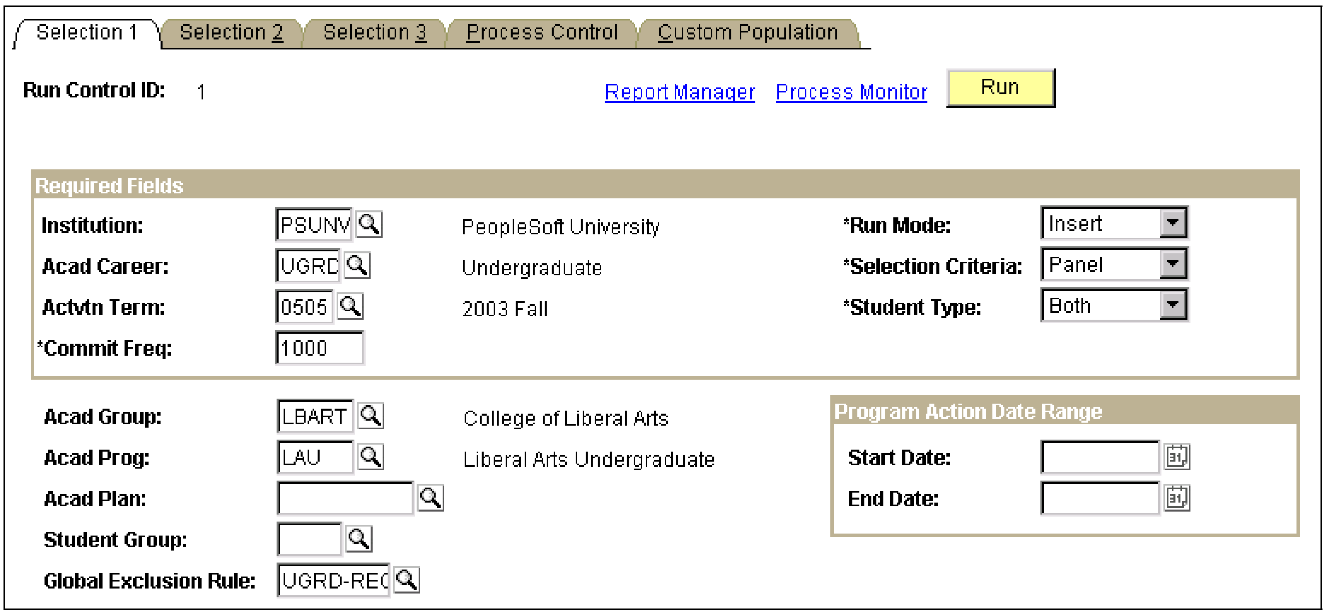
If you select the *Compare* option in the Term Activate field, this field becomes available and required. Select how you want the Term Activation process to compare the student's activation term to the expected graduation term. For example, by setting the Degree Checkout Status field to *Applied* and this field to < *Expected Graduation Term,* you can exclude all students from term activation that *do not* match these two criteria. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

See Also

Chapter 34, "Graduating Students," Verifying and Updating Student Degree Data, page 757

Entering Required and High-Level Criteria for Processing

Access the Selection 1 page.



Selection 1 page

The Term Activation process (SRTRMAC.SQR) provides extensive selection functionality for activating specific student populations into terms by academic career. On the Term Activation setup component you predefine rules of exclusion and inclusion, whereas on the Term Activation process component you define characteristics for the population of students that you want to include in batch term activation. You can also attach a global exclusion rule to a given process instance. All of the selection criteria in this component are additive and meant for you to broaden or narrow the scope of your target population for batch term activation. If you want to perform a basic run of the Term Activation process without specifying inclusions and exclusions, you can select values for all of the fields found in the Required Fields group box on the first page. Once you enter values for these fields, you can run the process at any time, ignoring the other fields in the component.

Note. You can only run the Term Activation process for one academic career at a time. If you want to activate students in terms across academic careers, you must run the process for each academic career.

Required Fields

This group box contains all the fields necessary to run the Term Activation process (SRTRMAC). The remaining fields on this page and the other pages in the component are optional. Use them to further restrict who is eligible for term activation on a specific run.

Institution Select an academic institution. The Term Activation process only considers students active in that academic institution as eligible for term activation.

Run Mode Select from the following choices the mode in which you want the Term Activation process to run. To ensure optimal performance, the process only allows you run in one mode at a time.

Insert: The Term Activation process considers for term activation only the students not yet activated in the activation term. If eligible, the process adds a new row of term data to the student's career term record (STDNT_CAR_TERM table).

Update: The Term Activation process considers for record modification only the students who already have been activated in the activation term. If eligible, the process updates the student's existing career term data (found in the STDNT_CAR_TERM table). Use other fields in this component to further control how the update function operates.

Acad Career (academic career) Select an academic career. The Term Activation process only considers students who are active in that academic career as eligible for term activation. The Term Activation process enables you to activate students in only one academic career per process run. To activate students for multiple academic careers, you must run the process for each academic career.

Selection Criteria Select from the following choices the type of selection criteria that you want the Term Activation process to use for the run.

Page: Use the fields available in the component to specify the criteria that determines the students who are eligible for term activation. (Default)

Custom: Activate a custom population of students, or large batches of students, for one term or across multiple terms. For example, use this option when you need criteria beyond what the component provides, or when you want to perform a student records conversion.

By selecting this option, you direct the Term Activation process to look at the delivered PS_TRMAC_CUST_PPLT table to determine who should be term-activated. If desired, you can create your own SQR to populate this table.

The Term Activation process, when run with the *Custom* option, selects custom populations from the PS_TRMAC_CUST_PPLT table based on run control ID and user ID. If you select the *Custom* option, you can edit or enter, on the Custom Population page (which is found in this component), the students and the terms for which you want to activate them. Otherwise, the Custom Population page is unavailable to edit.

Actvtn Term (activation term) Select the term for which you are running the process, known as the activation term. Students that meet all run criteria will be activated into this term. If you select a value of *Page* in the Selection Criteria field, then this field is required. If you select a value of *Custom* in the Selection Criteria field, the Term Activation process uses the term for the student on the PS_TRMAC_CUST_PPLT table or on the Custom Population page in this component.

Student Type

Select from the following choices the type of student to activate. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

New: Activate only students newly admitted to your academic institution.

Continuing: Activate only continuing students.

Both: Activate both new and continuing students simultaneously in a single run. (Default)

Note. The Term Activation process defines new and continuing students by comparing the activation term against the admit term. Students that have the same activation term and admit term are new. Students with an admit term prior to the activation term are continuing.

Commit Freq (commit frequency)

Select how many table rows of information (students) you want to process before committing changes to the database. The default is 1000. Consult your institution's database administrator for the appropriate setting for your institution. If you set the commit value to higher than the number of rows the program processes, then the program will only commit data once at the end of the run. The commit logic for this field is platform independent.

Optional Fields

The use of the Acad Prog (academic program), Acad Plan (academic plan), Acad Group (academic group), and the Program Action Date Range group box fields can improve the performance of the Term Activation process. However, excessive use of global exclusions and other selection criteria, such as academic standing actions, service indicator codes, and required enrollment terms might slow the process.

Acad Group (academic group)

Select an academic group to narrow the population of students to term-activate.

Acad Prog (academic program)

Select an academic program to narrow the population of students to term-activate.

Acad Plan (academic plan)

Select an academic plan to narrow the population of the students to term-activate. You can specify an academic plan independently of an academic program. For example, if you specify both an academic program and plan, then only students active in both the academic program *and* plan are eligible for term activation. However, if you specify an academic plan alone, then only students active in that academic plan regardless of their academic program are eligible for term activation.

Start Date and **End Date**

The beginning and end of the program action date range.

Use these fields to narrow the population of students to term-activate to a specific range of program action dates. For example, you can use this date range to limit term activation to only the students that have been activated or matriculated into an academic program since the last run of the Term Activation process. The Term Activation process compares this date range to the Action Date field on the Student Program page. The action date is the transaction date on which the student gets activated into an academic program, *not* the effective date. If the action date is greater than or equal to the start date and less than or equal to the end date, the student qualifies for term activation.

To use these fields you must enter values for both. By default, the end date equals the start date.

Student Group Select a student group to narrow the population of students to term-activate. The process only activates students within that student group who also meet the other selection criteria of the component.

Global Exclusion Rule If you want to use a global exclusion rule on this run to further narrow the population of students to term-activate, use this field's prompt to select a rule. If you do not want to use global exclusions, leave this field blank. You can specify a different global exclusion rule for each run of the process.

See Also

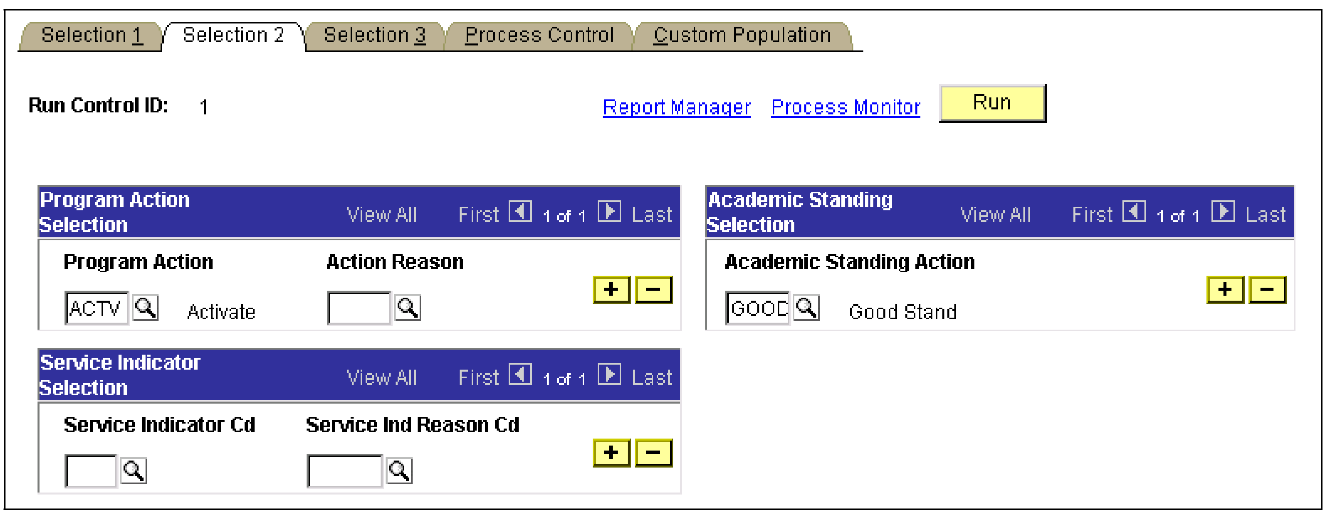
Chapter 20, "Performing Batch Term Activation," Defining Global Exclusions, page 461

Chapter 20, "Performing Batch Term Activation," Defining Degree Status Rules, page 463

Chapter 20, "Performing Batch Term Activation," Creating Custom Populations for Processing, page 476

Entering Detailed Criteria for Processing

Access the Selection 2 page.



Selection 2 page

This page enables you to narrow your target population for term activation by selecting the program action, action reason, academic standing action, and service indicator data that you want to include.

Note. The Term Activation process (SRTRMAC) connects academic standing, program action, and service indicator selections with an implied *and* between each selection type. The process connects the criteria with an implied *or* within each selection type.

Program Action Selection

Program Action Select the program action that you want to include for the Term Activation process. In Insert run mode, the system prompts you only with the actions that are eligible for term activation. In Update run mode, the system prompts you with all available actions. You can enter a program action that conflicts with a global exclusion. However, the global exclusion always takes precedence over the selection criteria.

Action Reason If you want to include a program action only when a particular reason is attached to that action, select a reason in this field. The system prompts you with only the program action reasons related to the program action you specify. When you specify a reason, list all of the reasons within that program action that you want the Term Activation process to include.

If you leave this field blank, the Term Activation process includes all students that have that program action and meet the other run criteria, regardless of the program action reason.

The Term Activation process evaluates each program action/reason combination using an implied *Or* statement. Therefore, never indicate a program action/reason combination and then for the same program action leave the action reason blank. In such a case, the process include all actions regardless of the reason you specified. For example, if you list a program action of *MATR* with an action reason of *FDEP,* then add another row with an action of *MATR* and the reason left blank, the Term Activation process will ignore the first entry and assume that any student with the program action of *MATR,* independent of the reason, is eligible for term activation.

Academic Standing Selection

Academic Standing Action Select the academic standing action that you want the Term Activation process to include.

The Term Activation process connects each academic standing using an implied *Or* statement. For example, PSUNV might want to make eligible for term activation only students with *GOOD* or *GREA* (great) academic standing that also meet the other run criteria.

Service Indicator Selection

Service Indicator Cd (service indicator code) Select the service indicator code that you want to include in the Term Activation process.

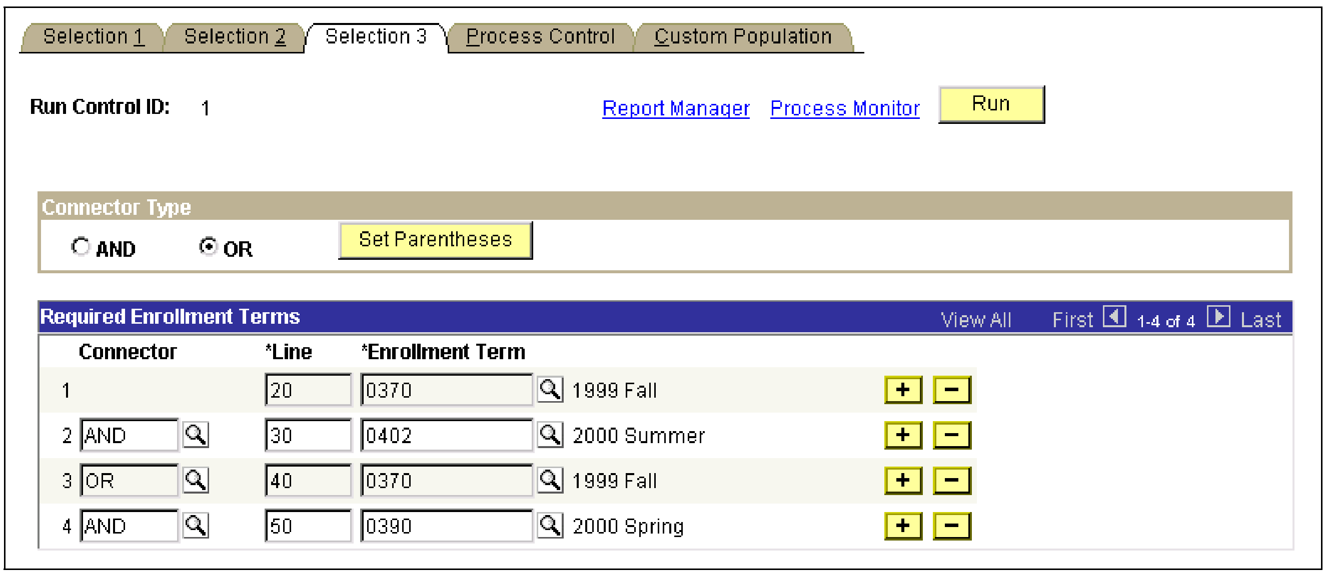
Service Indicator Reason Cd (service indicator reason code) If you want to include a service indicator code only when a particular reason is attached to that code, select a reason. The system prompts you with only the service indicator reasons related to the service indicator you specify. When you specify a reason, you must list all of the reasons within that service indicator that you want the Term Activation process to include.

If you select a service indicator code and leave this field blank, the Term Activation process includes all students that have that service indicator and meet the other run criteria, regardless of the service indicator reason.

The Term Activation process evaluates each service indicator/reason combination using an implied *Or* statement. You should therefore never indicate a service indicator/reason combination and then, for the same service indicator, leave the action reason blank. In such a case, the process will include all reasons. For example, if you list a service indicator of *ALL* with a service indicator reason of *BILL,* then add another row with a service indicator of *ALL* and the reason left blank, the Term Activation process will ignore the first entry and assume that any student with the service indicator of ALL, independent of the reason, must be eligible for term activation.

Entering Enrollment Lapse Rules for Processing

Access the Selection 3 page.



Selection 3 page

If you use this page, a student *must* be enrolled in a term or terms according to the rules you specify to be eligible for term activation in the term specified on the Selection 1 page of this component. You can use the Selection 3 page, for example, to prevent the term activation of students who lack enrollment records for the previous term.

PeopleSoft Student Administration defines a class enrollment as the existence of a row in the STDNT_ENRL table. The procedure that calculates what is and is not a class enrollment is a program file named SRENRLCK.SQC. The SQC is separate from the Term Activation process (SRTRMAC) so that your institution can modify the code that determines what is a class enrollment based on your institution's business needs without concern about future changes to the Term Activation process that might affect the modification. The SQC contains only one procedure, named SELECT-ENROLLMENT. The procedure description describes how the user should proceed with making modifications.

Important! Although we provide this feature with significant flexibility, it is always best to keep the rules simple. Enforcing these rules requires complex rule evaluation and possible increased database activity for each student. Too many rules might result in performance issues.

Connector Type

Use the Connector Type group box to specify how the Term Activation process should group individual enrollment requirement lines for evaluation to determine if students qualify for term activation. By choosing a connector type (AND, OR) and either saving the page or clicking the Set Parentheses button, the system displays parentheses so that you can visualize how the Term Activation process will interpret the rules.

AND and **OR**

Connector types indicating the main (default) Boolean operator to be used in the equation that contains the detail lines.

Select the main connector type (AND, OR) for this term activation criteria. Detail lines joined by the opposite of the main connector type are grouped into one partition. Detail lines joined by the main connector are considered as individual components (or partitions) of the equation. A partition is each detail line in the equation or each set of detail lines grouped by parentheses. For example, if the connector type is AND, and the detail lines are A OR B AND C OR D AND E, then the detail appears on the page as (A OR B) AND (C OR D) AND E. The first partition is (A OR B), the second partition is (C OR D), and the third partition is E. The main connector (that is, the connector that joins the partitions) is AND. The connector joining components within a partition is always the opposite of the main connector type. In another example, if the main connector is OR and the detail lines are A OR B AND C OR D, then the detail appears on the page as A OR (B AND C) OR D. The first partition is A, the second partition is (B AND C), and the third partition is D.

Set Parentheses

Click to parse the individual lines based upon the connector type and the visible parentheses on the page. The parentheses serve as a visual cue to describe how the process will evaluate the criteria. You can also save the page to have the system automatically recalculate the parentheses. You might need to reset the parentheses when you add additional lines, change the line order, or change the connector type.

Parentheses cannot be explicitly set to group detail rows.

If the main connector type is AND, then the system automatically creates partitions where AND is the main connector. For example, if A OR B AND C OR D is entered, then the implied statement is (A OR B) AND (C OR D).

If the main connector type is OR, then the system creates partitions where OR is the main connector. For example, if A OR B AND C OR D is entered, then the implied statement is A OR (B AND C) OR D.

Required Enrollment Terms

Use this grid to specify rules about the terms that students must be enrolled in to qualify for term activation.

Connector

Select a connector to indicate how this detail line is connected with the prior detail line. Your choices are *AND* or *OR.*

Line

This field displays a sequential line number, which the system automatically generates in increments of 10. It determines the order in which the process evaluates the line arguments. Use the Line column to manually reorder the criteria. After manually changing the line numbers, save the page or click the Set Parentheses button to visibly reorder the lines and recalculate the parentheses.

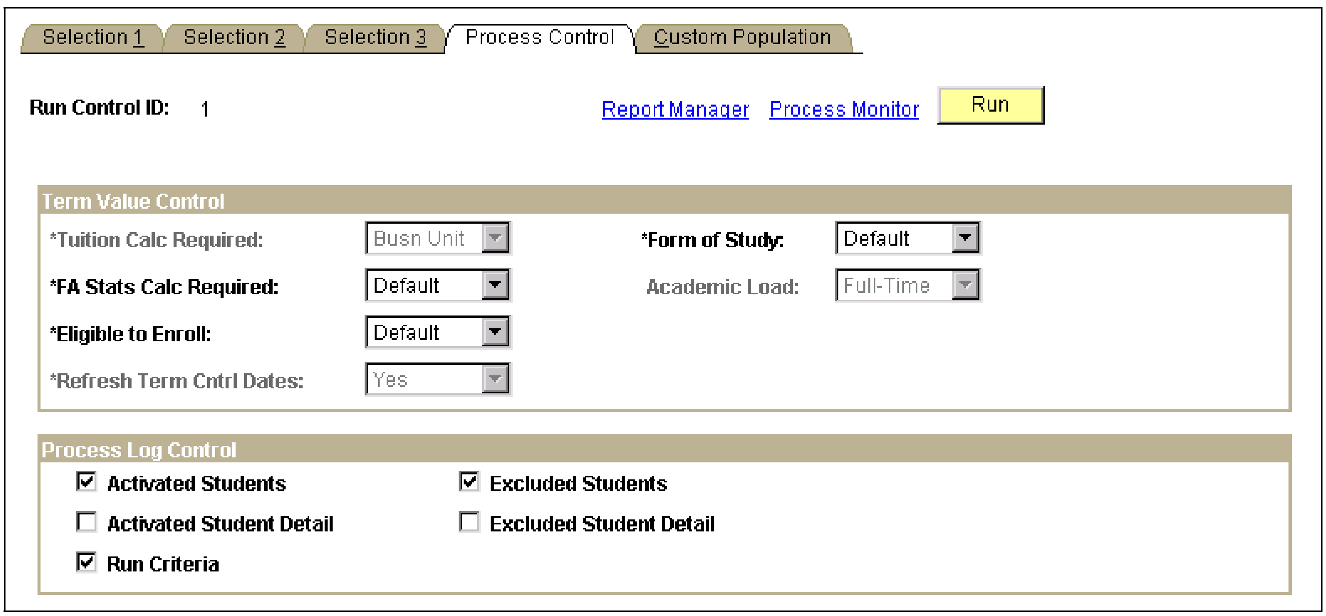
Enrollment Term

Select the term in which students must be enrolled to qualify for term activation. The Term Activation process determines class enrollment by locating a row for students in the STDNT_ENRL table for the specified term.

In the example depicted in the page above, the rule specified requires that the student have at least one class enrollment in the STDNT_ENRL table for one of the two concurrent terms. Specifically, a student could satisfy this rule and thereby be included in the term activation selection by being enrolled in (fall 1999 AND summer 2000) OR by being enrolled in (fall 1999 AND spring 2000). This structure supports any combination of requirements.

Entering Process Control Options

Access the Process Control page.



Process Control page

The upper frame of this page enables you to control how the Term Activation process (SRTRMAC) populates certain values on the student's career term record. The lower frame of the page enables you to specify the type and detail of information for the Term Activation process to write to the log files on any given run of the process. This page is available in both the Insert and Update run modes.

Term Value Control

Use the fields in this group box to define how the Term Activation process interacts with various fields in the STDNT_CAR_TERM table. In Insert run mode, you can define how the process initializes various fields in the table. In Update run mode, you can define how the process updates various fields in the table.

Tuition Calc Required (tuition calculation required)

PeopleSoft Student Financials uses this field to determine if tuition must be calculated or recalculated for students. The option that you select determines the value of the TUIT_CAL_REQ field on the STDNT_CAR_TERM table, setting the value to either *Y* or *N* on the student's career term record. When your institution calculates tuition, the tuition calculation process references this field to determine if a student's tuition needs to be recalculated. Select from the following choices.

Busn Unit: Tells the Term Activation process to use the corresponding field on the Business Unit SF Table to determine the value of the corresponding flag on the student's career term record. When you are in Insert run mode, the system automatically populates this field with the business unit and it is unavailable to edit.

No Change: When you are in Update run mode this is the default value. If you run the Term Activation process with this value set, the process leaves the corresponding field on the STDNT_CAR_TERM table unchanged.

No: Select this option to have the Term Activation process set the TUIT_CAL_REQ field on the STDNT_CAR_TERM table to *N* on each affected student's career term record. When your institution calculates tuition, the tuition calculation process will not recalculate this student's tuition.

Yes: This option is available in Update run mode only. Select this option to have the Term Activation process set the TUIT_CAL_REQ field on the STDNT_CAR_TERM table to *Y* for all students whose career term records it has updated. When your institution calculates tuition, the tuition calculation process will recalculate tuition for these students.

Form of Study

Select how you want to set the form of study for the student's career term record. Valid values for this field are *Default, No Change,* and all of the other delivered translate values for form of study. The *Default* and *No Change* translate values have coding attached to them and should not be modified. You can, however, add other values to the translate table.

In Insert run mode, if the activated student has an activation row for a previous term within the same academic career and you select either the *Default* or *No Change* options, the system carries forward the value from the previous term. If, however, you select *Default* and the student has never been term-activated for the same academic career, the value of this field gets set by default to *Enrollment* (ENRL).

In Update run mode, if you select either the *Default* or *No Change* options, the Term Activation process leaves the Form of Study field unchanged. If you set the field value to anything else while in the Update run mode, the Term Activation process changes the STDNT_CAR_TERM value to the value that you select from the list of translate values.

Note. If you select any value besides *Default, No Change,* or *Enrollment* the Academic Load field becomes available and required.

FA Stats Calc Required (financial aid statistics calculation required)

Select from the following choices how you want the Term Activation process to set the FA_STATS_CALC_REQ flag on the STDNT_CAR_TERM table. The Financial Aid Term Build process uses the value of the FA_STATS_CALC_REQ flag to determine if a STDNT_CAR_TERM record should be built or rebuilt for the student term. If the FA_STATS_CALC_REQ flag is set to *Y,* then the Financial Aid Term Build process builds or rebuilds the Financial Aid Term record for the student term. If the FA_STATS_CALC_REQ flag is set to *N,* then the Financial Aid Term Build process assumes no significant changes have been made and skips the student.

Yes: Sets the FA_STATS_CALC_REQ flag to *Y* on each student's STDNT_CAR_TERM record.

No: Sets the FA_STATS_CALC_REQ flag to *N* on each student's STDNT_CAR_TERM record.

Default: Sets the FA_STATS_CALC_REQ flag to *Y* on each student's STDNT_CAR_TERM record.

No Change: Leaves the value of the FA_STATS_CALC_REQ flag unchanged.

Academic Load

In the Update run mode, this value becomes available and required when the *Form of Study* field value is set to a value other than *Enrollment, No Change,* or *Default.* Select the academic load for the student's updated career term record.

Eligible to Enroll

Select from the following choices whether students activated in a term through this process are then eligible to enroll in that term. This field is available in both Insert and Update run modes.

Yes: Select this value to set the Eligible to Enroll flag on the STDNT_CAR_TERM record to *Y,* making students activated in a term through this process eligible to enroll in that term.

No: Select this value to set the Eligible to Enroll flag on the STDNT_CAR_TERM record to *N,* thus making students activated in a term through this process ineligible to enroll in that term.

Default: Select this value to have the process look at the value of the student's Eligible to Enroll flag on her or his STDNT_CAR_TERM record for a prior term within the same academic career. In Insert run mode, if the student does not have a term activation row for a prior term within the same academic career, the process sets the flag on the student's career term record for the current term to *Yes,* making the student eligible to enroll. If the student does have a term activation row for a prior term within the same academic career, the process carries forward the value of the Eligible to Enroll flag to the current term activation row.

No Change: In Update run mode, select this option to have the Term Activation process leave the value of the Eligible to Enroll flag on the STDNT_CAR_TERM record unchanged.

Refresh Term Cntrl Dates (refresh term control dates)

Controls how the Term Activation process carries down certain term control dates from the academic calendar (ACAD_CALTRM_TBL) to the individual student career term record. The process refreshes the following dates on student career term record: Fully Enrolled Date, Show Enrollment on Transcript Date, Show Statistics on Transcript Date, and Fully Graded Date. Valid values for this field are *Yes* and *No.*

In Insert run mode, the system populates this field with *Yes* because the Term Activation process always carries down the term control dates from the academic calendar. In this mode the field is unavailable to edit.

In Update run mode, the system populates this field with *No* to indicate that the process should leave the term control dates unchanged. However, you can change this value to *Yes,* which is especially useful if students have already been activated in a term and you need to change any of the control dates for that term.

Process Log Control

Use the fields in this group box to select how you want the Term Activation process to log statistics by selecting the type and level of detail information that you need. The selected system defaults are *Activated Students, Excluded Students,* and *Run Criteria.* The system assigns a unique process number to the log file srtrmac.dat that you generate so that you can retain and track online versions of the log files. The log includes processing totals on students activated, students updated, and students ineligible. You can view the log by accessing the Report/Log Viewer page and clicking the Trace File link. Access the Report/Log Viewer page either by clicking the Report Manager link on the run control page then the appropriate View link on the Report List page, or by clicking the Process Monitor link on the run control page, the appropriate Details link on the Process Requests page, then the View Log/Trace link. If you only want a count of the students included or excluded from term activation, clear all check boxes.

Activated Students Select to log students who are included in term activation. The log file provides employee ID, activation term, action taken by the process, academic institution, academic career, and primary academic program.

Excluded Students Select to log students who are excluded from term activation. The log file provides employee ID, activation term, action taken by the process, academic institution, academic career, and primary academic program.

Activated Students Detail Select to log students who are included in term activation in greater detail. The log file provides employee ID, academic career, career number, activation term, academic group, academic program, academic plan, program action, program action reason, admit term, effective date, term activation action, and term activation exclusion reason.

Excluded Students Detail Select to log students who are excluded from term activation in greater detail. The log file provides employee ID, academic career, career number, activation term, academic group, academic program, academic plan, program action, program action reason, admit term, effective date, term activation action, and term activation exclusion reason.

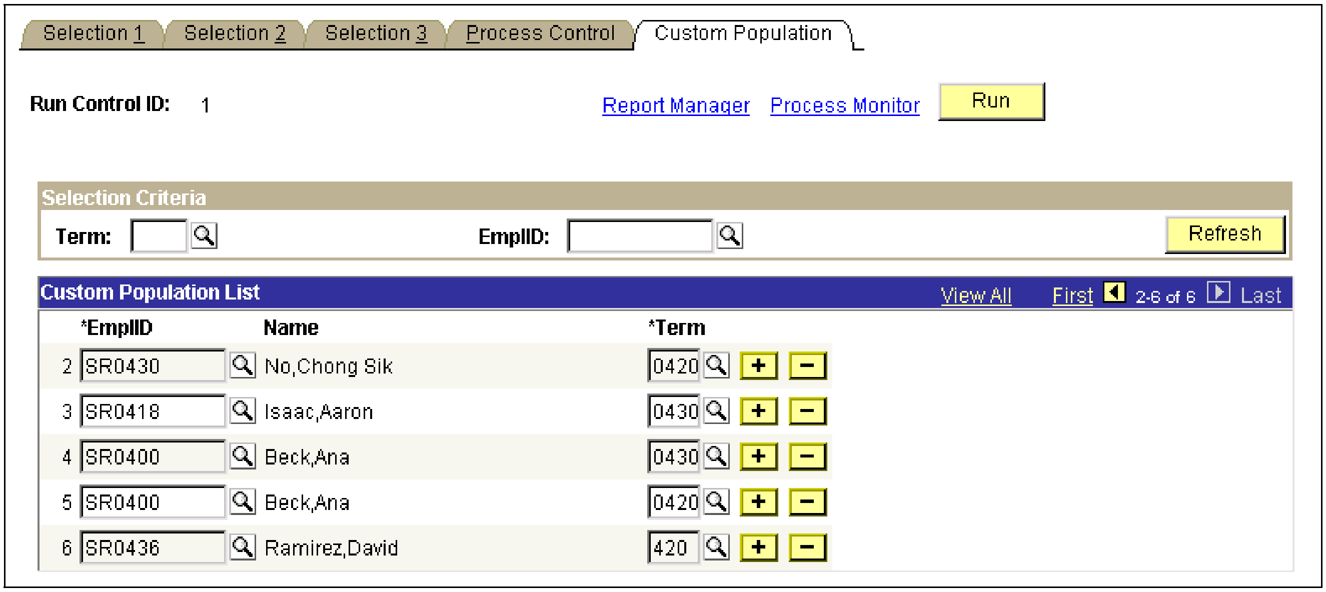
Run Criteria Select to log all page selection criteria and run control options, including the global exclusion rule, for the process instance.

See Also

Using PeopleSoft Applications

Creating Custom Populations for Processing

Access the Custom Population page.



Custom Population page

The system transfers this data to and from the PS_TRMAC_CUST_PPLT table by OPRID and run control ID. Rather than manually entering students into the table, you can populate the table using a specialized SQR script that your institution develops to accomplish the task.

When you run the Term Activation process (SRTRMAC) for a custom population, the process knows which students to run from the PS_TRMAC_CUST_PPLT table by looking at the OPERID and run control ID. It processes all valid rows of data it finds in the PS_TRMAC_CUST_PPLT table, provided that you have set the Selection Criteria field on the Selection 1 page to *Custom.* Otherwise, the system makes this page unavailable and the process disregards the data in the table.

A key feature of the *Custom* option is that you can activate students for multiple terms in the same run, whereas the *Page* option (which is the alternative option) restricts you to one term per process run. In addition, the *Custom* option enables you to use other selection criteria fields in the component (except the Term field on the Selection 1 page) to narrow your population selection. Please note, however, that the process supports only one academic institution and one academic career at a time. You specify the academic institution and academic career on the Selection 1 page, which is the first page in this component. If you load the table with an SQR script (thus bypassing the page edits) and subsequently try to run the process for more than one academic institution and academic career at a time, the process halts and writes an error message to the process log.

Note. The Term Activation process functions independently of the rows visible for viewing in the page grid. You do not need to retrieve and load the data into the page before running the process.

Warning! Loading a large amount of data into the page can adversely affect performance.

Term	Select the term for which you want to retrieve rows of data from the PS_TRMAC_CUST_PPLT table. If you want to search on all terms for an academic institution and academic career (as specified on the Selection 1 page), then leave this field blank.

EmplID (employee ID) Select an employee identification number to retrieve, from the PS_TRMAC_CUST_PPLT table, rows of data on a specific person. The system prompts against the PS_TRMAC_CUST_PPLT table and displays all applicable employee IDs in that table according to user ID, run control ID, term for which you are searching, and academic institution and academic career (as specified on the Selection 1 page).

Refresh Click to retrieve rows of data from the PS_TRMAC_CUST_PPLT table that match the criteria you entered in the Term and EmplID fields. This feature is optional, letting you view and edit your custom population before running the Term Activation process.

EmplID (employee ID) The grid displays data rows retrieved from the PS_TRMAC_CUST_PPLT table according to your search criteria in the Term and EmplID fields above the grid. The system displays the employee identification number of the person to which the row of data pertains.

To add to the list of retrieved data or to make a new custom list, select an employee ID. The system prompts against a view of the ACAD_PROG table (STDNT_PROG_VW), which lists all employee IDs with a program row (active or inactive).

Name The system displays the name of the person to which this row of data pertains, as retrieved from the PS_TRMAC_CUST_PPLT table. If you are inserting an additional row or creating a custom list, the system displays the person's name when you exit the EmplID field.

Term Select the term for which you want to activate the student. If you have searched for and retrieved the data row from the PS_TRMAC_CUST_PPLT table, the system displays the term for which you searched. You can change the term.

CHAPTER 21

Performing Quick Activation

There are many instances when you might have to activate a student quickly, bypassing the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions.

This chapter discusses how to perform a quick activation and thus move a student rapidly into PeopleSoft Student Records, presuming that the student's name and address are in the system.

Processing a Quick Activation

To process a quick activation:

1. Activate the student into an academic program and plan through the Student Program/Plan component by updating the program action code on the Student Program page to *ACTV* (active).

   The student must have an active academic program and plan for you to activate that student into a term. Select Manage Student Records, Track Student Careers, Use, Student Program/Plan.

2. Activate the student into a term through the Student Term Activation page.

   Select Manage Student Records, Manage Academic Records, Use, Term Activation. Once you save the information on this page, you have completed the quick activation process. The student is now ready to enroll in classes for the term.

See Also

Chapter 19, "Managing Students' Programs, Plans, and Subplans," Maintaining Students' Program Stacks, page 445

Chapter 20, "Performing Batch Term Activation," page 457

Chapter 22, "Maintaining Student Career Term Records," page 481

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Adding and Updating Applications," Updating Applications

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data"

CHAPTER 22

Maintaining Student Career Term Records

This chapter lists prerequisites and discusses how to:

- Use the Term Activation component.
- Query for academic level differentials.

Prerequisites

Before you can use all of the elements in the Term Activation component you must complete the following prerequisites:

- Activate the student in an academic program.
- Set up default enrollment limits on the Term Enrollment Limits page of the Academic Program Table component.
- Define term control date default values on the academic calendar.

Using the Term Activation Component

This section discusses how to use the Term Activation component to maintain the following items for a student:

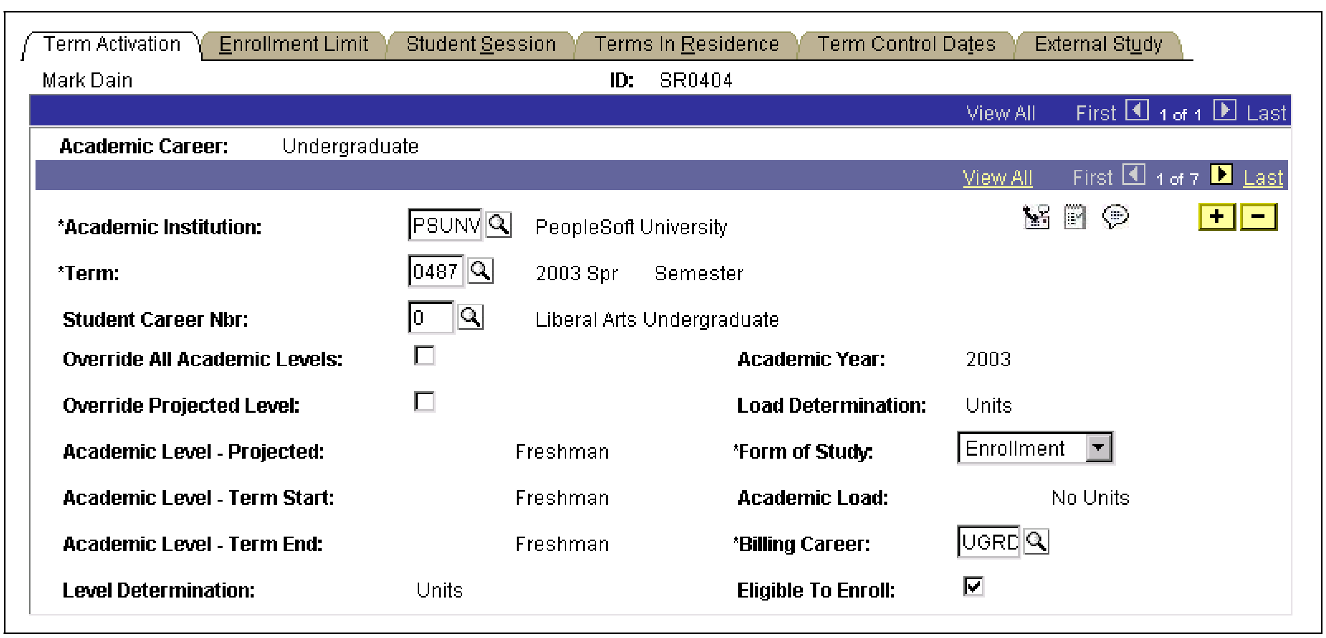
- Career term record
- Term enrollment limits
- Session data
- Terms in residence
- Term control dates
- External study agreements

Pages Used to Maintain Student Career Term Records

Page Name	Object Name	Navigation	Usage
Term Activation	STDNT_ACTIVATION	Manage Student Records, Manage Academic Records, Use, Term Activation, Term Activation	Maintain a student's career term record or activate a student into a term.
Enrollment Limit	STDNT_ENRL_LIM	Manage Student Records, Manage Academic Records, Use, Term Activation, Enrollment Limit	Maintain a student's term enrollment limits.
Student Session	STDNT_SESSION	Manage Student Records, Manage Academic Records, Use, Term Activation, Student Session	Maintain a student's session data within the student's career term record.
Terms in Residence	STDNT_CAREER_RES	Manage Student Records, Manage Academic Records, Use, Term Activation, Terms In Residence	Maintain a student's terms in residence or adjust a student's transfer credit values.
Term Control Dates	STDNT_TERMCNTRL_DT	Manage Student Records, Manage Academic Records, Use, Term Activation, Term Control Dates	Maintain a student's fully enrolled date, fully graded date, and dates for showing enrollment and statistics on transcripts.
External Study	STDNT_EXT_STUDY	Manage Student Records, Manage Academic Records, Use, Term Activation, External Study	Track and maintain external study programs, such as study abroad, that apply towards a student's career term record.

Maintaining a Student's Career Term Record

Access the Term Activation page.



Term Activation page

Academic Career	This component displays all of a student's career term records by academic career.
Academic Institution	The system populates an academic institution, taking the value from the User Defaults component. You can specify any valid academic institution here, but you can add a record only if the student is active in an academic program at that academic institution as of the start date of the specified term.
Term	The system displays all active terms for a student. If you are performing a quick activation, enter the term in which to activate the student.
Student Career Number	By default, the system sets the student career number to zero, which is the first academic program in the student's program stack and identifies the student's primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student's academic level and load. You can override the student career number, for instance, for students in dual programs. Once you override the student career number in one term it rolls from term to term.
Override Projected Level	Select to modify the student's projected academic level. The Academic Level - Projected field becomes available to edit. If you clear this check box, the system uses the academic level defaults established on the Academic Level Table page.
Override All Academic Levels	Select to modify all academic level fields on this page. If you clear this check box, the system uses the academic level defaults established on the Academic Level Table page.
Academic Level - Projected	The system displays the student's projected academic level at the start of the term, which will be the student's actual academic level, provided that the student passes all in-progress units from previous terms. The system uses this field for enrollment restriction checking and tuition calculation, among other things. You can override this field value if you select either the Override Projected Level check box or the Override All Academic Levels check box. You might override a student's projected academic level when you know that your academic institution will be receiving the student's transfer credit, but the credit has not yet been entered into the student's official record.
Level Determination	By default, the system displays the level determination value from the Level/Load Rules Table component, based upon the academic career that you select for the student on this page.
Load Determination	By default, the system displays the load determination value from the Level/Load Rules Table component, based upon the academic career that you select for the student on this page.
Academic Level - Term Start	By default, the system displays the student's academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. You can override this field value if you select the Override All Academic Levels check box.

Academic Level - Term End By default, the system displays the student's academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. You can override this field value if you select the Override All Academic Levels check box.

Academic Year By default, the system displays the academic year, based upon the term you enter.

Academic Load The system displays the student's academic load, which is calculated in units enrolled.

Form of Study The system, by default, sets the student's form of study to *Enrollment,* but you can override this default value. The value of *Enrollment* tells the system that this form of study is unit-based. You can modify these translate values, with the exception of the *Enrollment* value.

Eligible to Enroll The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. Clear this check box to prevent the student from enrolling in classes for the specified term.

You might clear this check box when posting transfer credit to a student's career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.

Billing Career The system, by default, sets the student's billing career to the academic career in the student's career term record. The tuition calculation process uses the student's billing career to calculate the student's tuition.

If the student is active in more than one academic career in the same term, you might want to consolidate tuition calculation and billing under a single academic career. If so, then point the billing career for all of the student's career term records to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. If you want to consolidate tuition calculation to just the undergraduate career, you would select undergraduate as the billing career for both the student's undergraduate term record and graduate term record.

If you decide to use a single billing career for all of a student's academic careers within a term, note that to perform a term or session withdrawal, the student must be enrolled in at least one class within the academic career that you select as the student's billing career. Otherwise, the term withdrawal and session withdrawal processes halt processing and instruct you to change the student's billing career to an academic career in which the student has enrollments for the term.

Calculate Tuition Click to go to the Tuition Calc (tuition calculation) page so that you can calculate tuition and fees for this student.

See Also

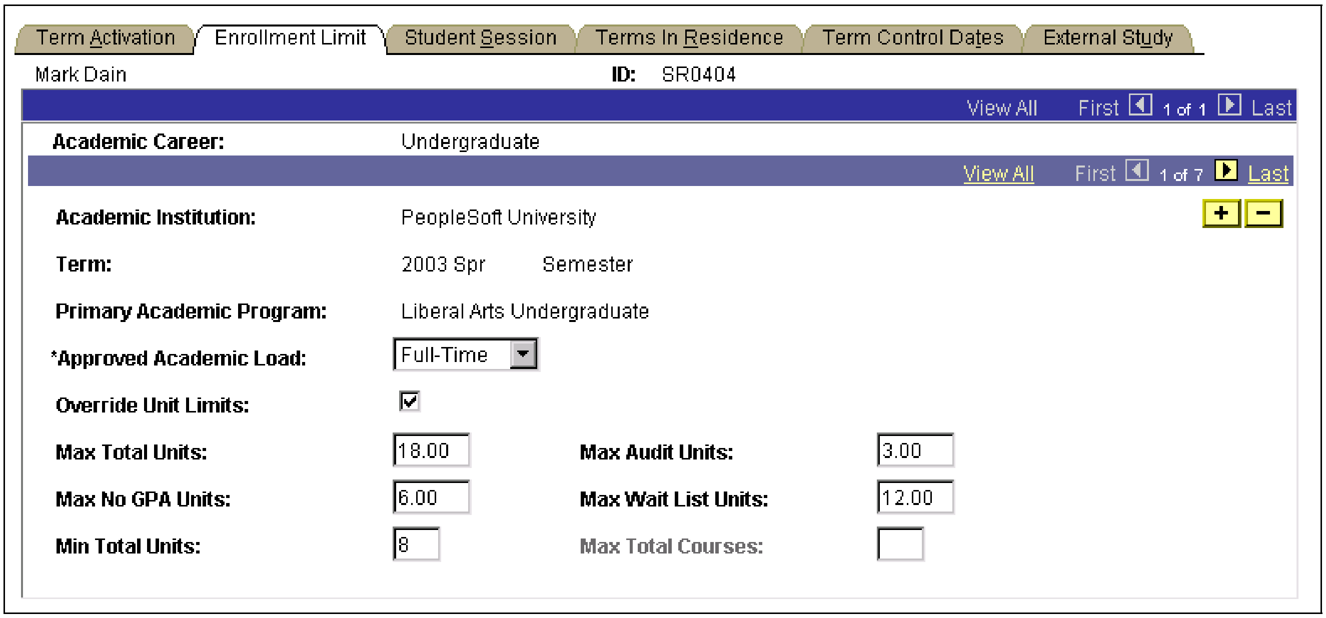
Chapter 29, "Processing Transfer Credit," page 619

Chapter 26, "Using Enrollment Related Processes," Processing Withdrawals and Cancellations, page 585

PeopleSoft 8 SP1 Student Financials PeopleBook, "Calculating Tuition and Fees," Calculating Tuition for Multiple Students

Maintaining a Student's Term Enrollment Limits

Access the Enrollment Limit page.



Enrollment Limit page

Approved Academic Load

The system, by default, displays the student's approved academic load based on the values on the Term Enrollment Limits page of the Academic Program component. You can override this field value.

Override Unit Limits

Select to override the student's term enrollment limits for the approved academic load that you have selected. The unit limit fields become available for entry. When processing enrollment requests with this override, the enrollment engine uses the term enrollment limits that you define on this page rather than the ones defined on the Enrollment page of the Academic Program Table component. When using this override, the enrollment engine *does not* include the wait list units in the maximum total unit limit. For example, let's say that you limit the student to 18 maximum total units, 3 maximum no GPA units, 3 maximum audit units, and 9 maximum wait list units. The student can enroll in a maximum of 18 units for the term. Of these 18 units, the student can take 9 no GPA units (including 3 audit units). In addition to the 18 maximum total units, the student can take an additional 9 wait list units.

Clear this check box to have the enrollment engine use the term enrollment limits set on the Enrollment page of the Academic Program Table component.

Max Total Units (maximum total units): Enter the maximum number of units that the student can be enrolled in for the term.

Max Audit Units (maximum audit units): Enter the maximum number of units that the student can take with an audit-grading basis for the term.

Max No GPA Units (maximum no GPA units): Enter the maximum number of GPA units that the student can enroll in with a non-GPA-grading basis for the term.

Max Wait List Units (maximum wait list units): Enter the maximum number of wait list units that the student can have for enrollment for the term.

Min Total Units (minimum total units): Enter the minimum number of units that the student must be enrolled in for the term. The enrollment engine references this value only when a student attempts to drop a class or make a units adjustment for a class.

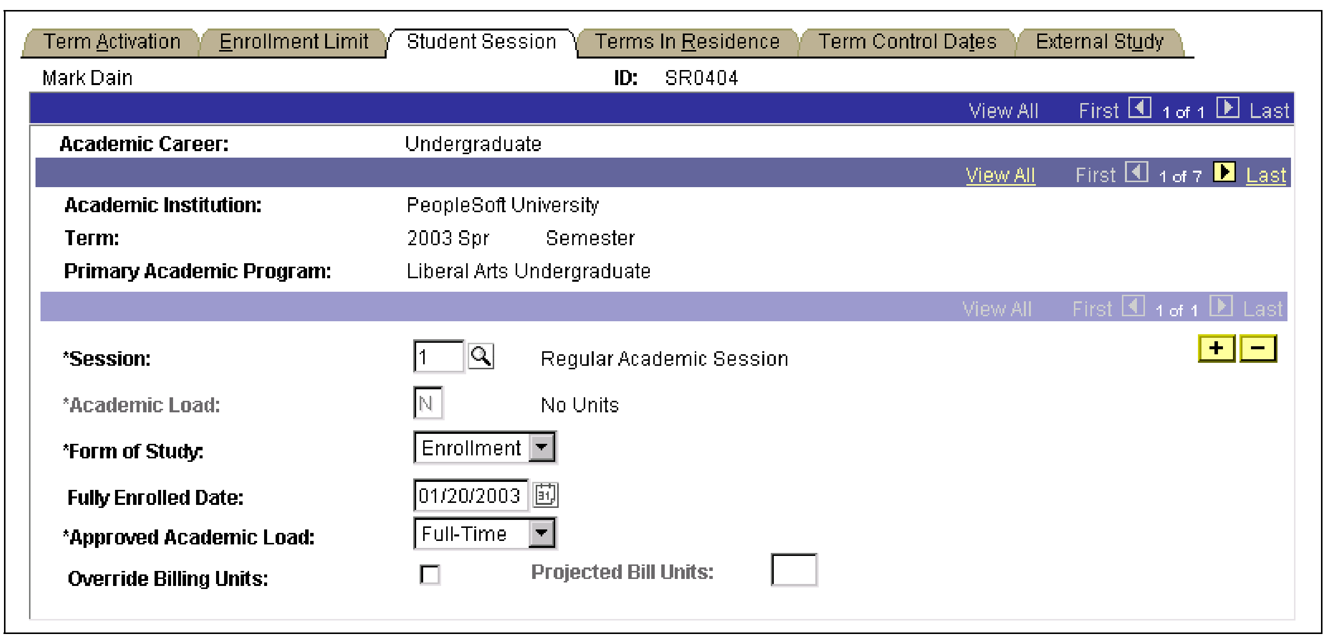
Max Total Courses (maximum total courses): The system displays by default the maximum number of courses in which a student can be enrolled for the term according to the value set on the Course Count Limits page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Programs, Plans, and Subplans," Setting Up Term Enrollment Limits for Academic Programs

Maintaining a Student's Session Data

Access the Student Session page.



Student Session page

This page displays all of a student's academic careers, terms, and sessions.

Session Select the type of session in which the student will enroll into classes for the specified academic program and term.

Academic Load By default, the system displays the student's academic load for the term. You may change the value for an individual session within the term. The system calculates academic load based on the number of units for which the student is enrolled. This field is unavailable for edit if the form of study for the session is *Enrollment.*

Form of Study By default, the system displays the same form of study as defined for the term on the Term Activation page of this component. You can change the form of study for sessions that differ from the term value. For example, perhaps a student's form of study for the term is *Enrollment,* but they are studying abroad for one session of that term. Your choices are *Abroad, Candidacy, Detached,* and *Enrollment.* You can modify these translate values with the exception of the *Enrollment* value.

By default, the system displays the student's approved academic load according to the value set on the Term Enrollment Limits page of the Academic Program Table component. You can override this field for an individual session within the term.

Fully Enrolled Date The date that the system considers the student fully enrolled for financial aid load calculations and billing purposes. The system, by default, sets the student's fully enrolled date to the corresponding date for the session, as defined in the academic calendar. You can override this date.

If you override the fully enrolled date because the student's account is due a refund, you must recalculate the student's tuition. You can calculate a student's tuition through the Tuition Calculation page (Student Financials-Calculate Tuition and Fees, Use, Tuition Calculation).

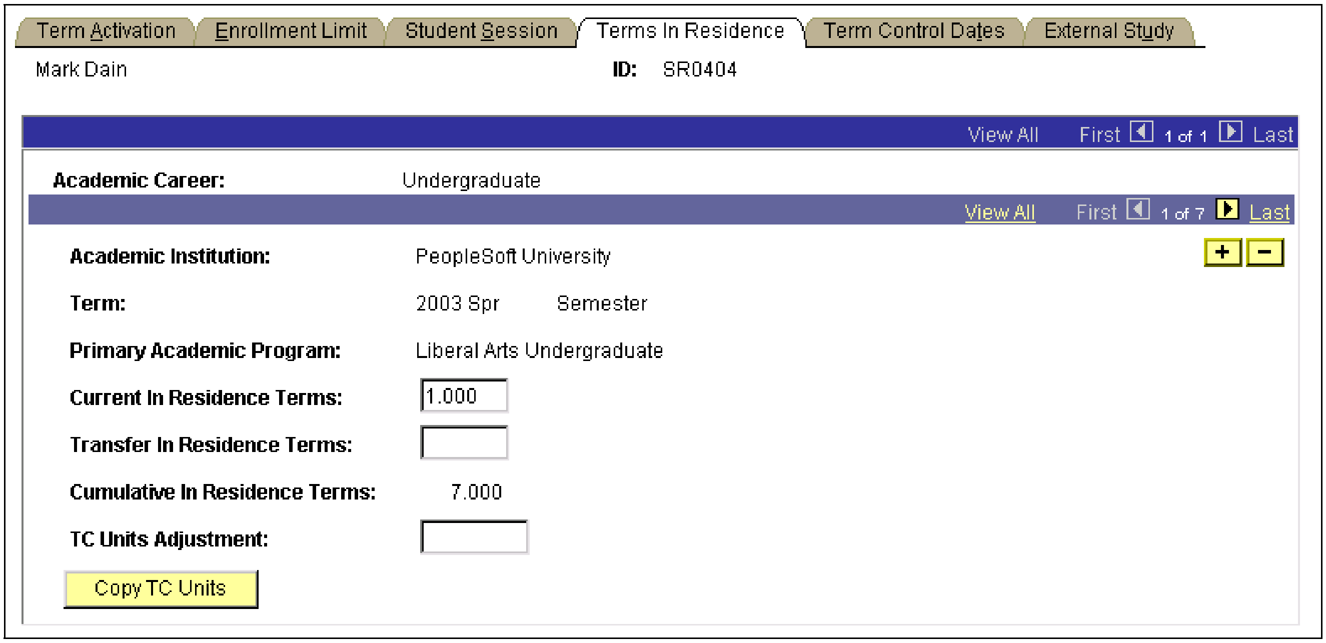
Override Billing Units Select if want to calculate the student's tuition bill with criteria other than the number of units in which the students enrolls. If you set billing units as a part of tuition calculation, the system displays the number of the student's projected billing units.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, "Calculating Tuition and Fees"

Maintaining a Student's Terms in Residence

Access the Terms in Residence page.



Terms in Residence page

Use terms in residence to track to the number of terms in which a student is activated. Course work can be completed and easily tracked in terms. In addition, work that is accomplished outside the classroom—such as fieldwork and dissertation preparation—is also tracked by term even if the student is not enrolled in formal classes. For students affected by level load rules that are not based on terms, one term row equals one term in residence. For students affected by term-based level load rules, a term row can be greater than, equal to, or less than one term depending on the resident terms adjustment factor of the level load rule.

PeopleSoft Academic Advisement does not use the term value stored here to calculate derived list *Terms in Residence.* Instead, the Advisement engine creates one term in residence for every term in which a student was enrolled at the academic institution.

Current in Residence Terms

The system, by default, displays the current number of terms in which the student is in residence within his or her primary academic program and term. If the level load rule that applies to the student has a resident terms adjustment factor, the system uses the student's approved academic load and the resident terms adjustment factor to determine the default value. Otherwise, the system displays *1* as the default value. You can override the value in this field.

Transfer in Residence Terms

Enter the number of terms that the student has transferred from another organization.

Cumulative in Residence Terms

The system displays the student's total number of current, past, and transfer terms. The value is the cumulative total of residency terms.

TC Units Adjustment (transfer credit units adjustment)

Use this field if you want to limit the units brought into the system as transfer credit. Make such an adjustment to prevent a student from exceeding predefined transfer credit limits or to manually prevent a student's academic level term start and term end values from incrementing excessively on the Term Activation page.

To make an adjustment, you need to know the total number of units being transferred and whether that total number of units exceeds your institution's predefined transfer credit unit limit for the term. Use the Cumulative Statistics page to see the total number of units entering the system as transfer credit. When the GPA calculation program executes, the system subtracts whatever the value is in the TC Units Adjustment field from the total transfer credit units so that the student does not exceed predefined limits.

For instance, if your institution accepts 70 transfer units for the first two years of enrollment, but this student is bringing in 75 units, you can enter *5* in this field so that when transfer units are calculated, the system subtracts 5 units from the total. The system subtracts units only from the total. If you want to be more selective regarding which units are subtracted, do so on the transfer credit process pages.

Copy TC Units (copy transfer credit units)

Click to complete the transfer credit posting process. When you try to post transfer credit statistics for a student in a particular academic program and for a particular articulation term, the system checks to see if the student is active in the term and academic program that you select. If the student is not active in either the academic program or the articulation term, the system sets the status to *Complete.* This gives you the ability to evaluate transfer credit and store the statistical information for a student prior to the completion of the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions.

After you activate a student in the appropriate academic program and in the articulation term that you selected, you *must* click this button to transfer the student's transfer credit to the STDNT_CAR_TERM table in PeopleSoft Student Records, thereby completing the transfer credit posting process. If you do not copy transfer credit units after term activation, the student's career term record will not reflect the student's transfer credit units for the term. Remember to save your changes after you click this button. The system does not update the STDNT_CAR_TERM table until the save is performed.

If you select a term without a transfer credit model status of *Complete,* the system displays a message informing you that there is nothing to update.

See Also

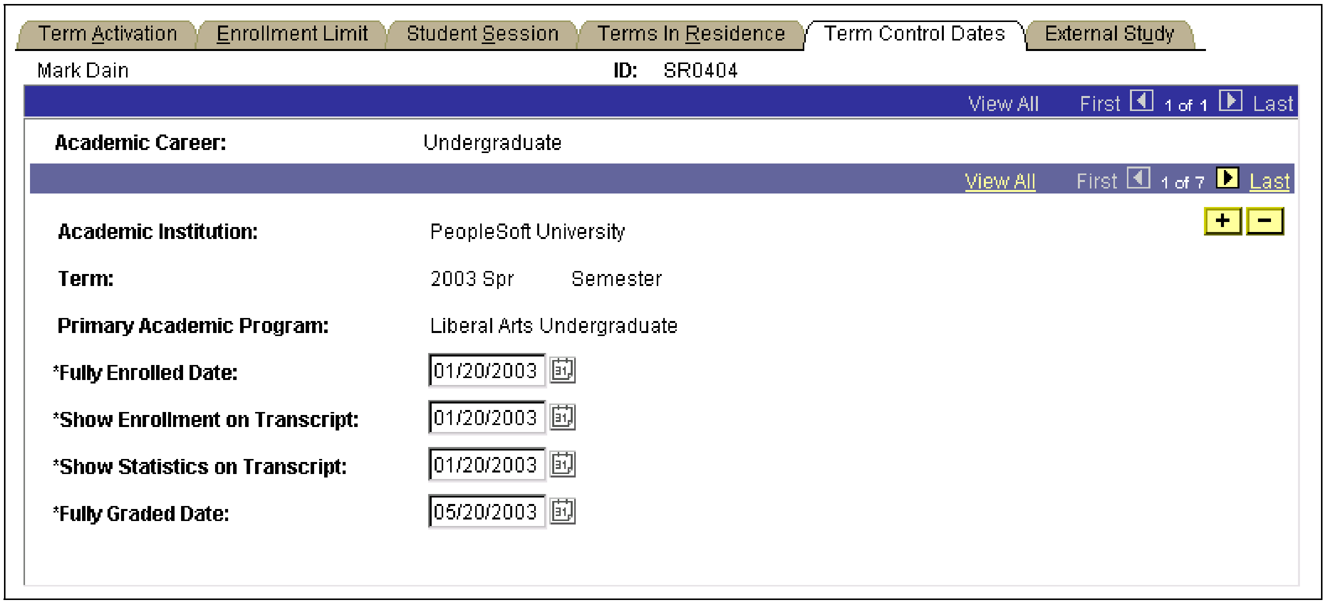
Chapter 27, "Viewing Class Enrollment Data," Viewing Cumulative Statistics for Multiple Terms, page 600

Chapter 29, "Processing Transfer Credit," page 619

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Requirements," Creating a Requirement Line Item

Maintaining a Student's Term Control Dates

Access the Term Control Dates page.



Term Control Dates page

Fully Enrolled Date
Enter the date on which this student is considered fully enrolled in the specified term. As of this date, the student's coursework appears on their transcripts. This date is also used for financial aid load calculations and billing purposes. The system, by default, displays the corresponding value from the Term Calendar 3 page for the specified term based on the student's primary academic program for the term.

Show Enrollment On Transcript
Enter the date on which the system displays the student's work in progress on the transcript.

Show Statistics On Transcript
Enter the date on which the system displays the student's academic statistics on the transcript.

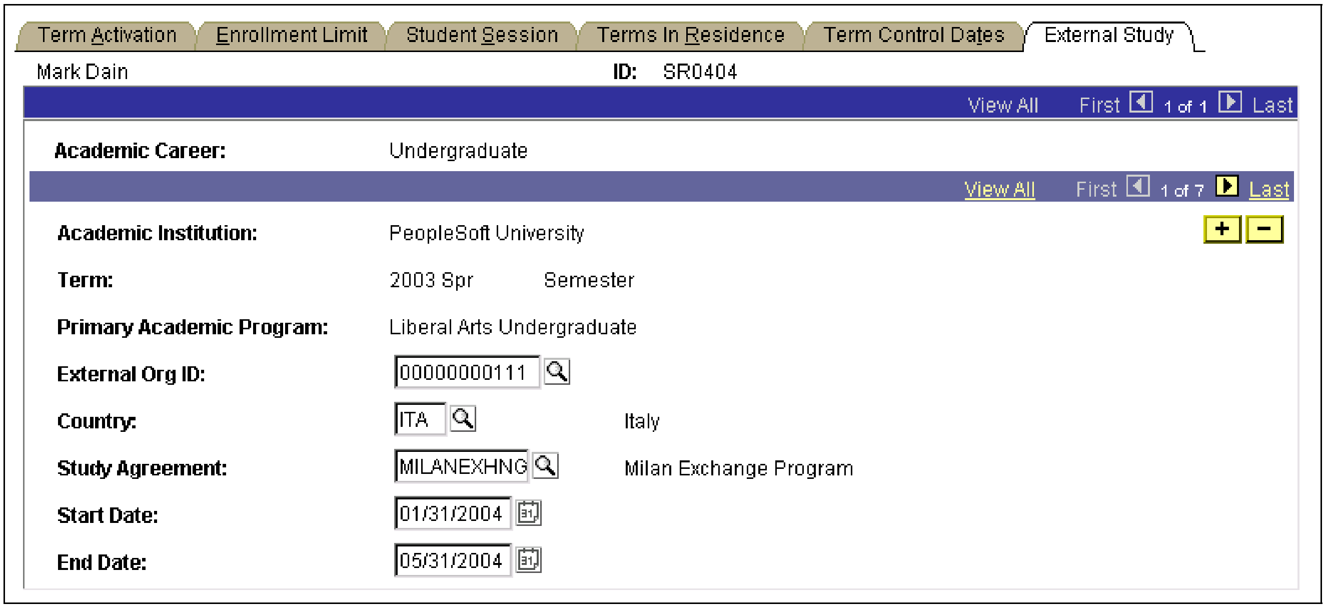
Fully Graded Date
Enter the date on which the system considers this student's enrollment record for the specified term as fully graded. This value comes from the academic calendar by default. When you define transcript types you can indicate whether the transcript processes should obey this date and display grade information.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Traditional Academic Calendars"

Tracking and Maintaining a Student's External Study Agreements

Access the External Study page.



External Study page

External Org ID Select the identification number of the external organization that is sponsoring the student's external study program.

Country Select the country in which the external organization resides.

Study Agreement Select the study agreement that describes the student's external study program.

Start Date and **End Date** Enter the dates on which the student's external study program begins and ends.

Querying for Academic Level Differentials

Use the delivered public query STDENT_TERM_ADMIT_LEVEL to identify individuals with differences between their academic level on the admissions application, as defined on the Application Data page, and their academic level at term start, as seen on the Term Activation page. This query, which you can access through Query Manager, compares an individual's academic level in the PeopleSoft Recruiting and Admissions table ADM_APPL_DATA to that same individual's academic level in the PeopleSoft Student Records table ACAD_PROG through a view. If the values are different, the query captures these rows and displays them for you in Query Manager.

If the individual's academic level in the ACAD_PROG table is lower than the academic level in the ADM_APPL_DATA table and you want to increase the ACAD_PROG academic level, you must complete one of the following actions:

- Grant the student additional other credit units for a special course through the transfer credit process, provided that the student's academic program bases level/load determination on units.
- Grant the student additional terms in residence credit through the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level/load determination on terms.

If the individual's academic level in the ACAD_PROG table is higher than the academic level in the ADM_APPL_DATA table and you want to decrease the ACAD_PROG academic level you must complete one of the following actions:

- Enter a negative credit amount in the TC Units Adjustment field on the Terms in Residence page of the Term Activation component, provided that the student's academic program bases level/load determination on units.
- Enter a negative terms in residence amount in the through the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level/load determination on terms.

CHAPTER 23

Managing Enrollment Appointments

This chapter provides an overview of enrollment appointments and discusses how to:

- Create enrollment appointments.
- View enrollment appointments through self-service.

Understanding Enrollment Appointments

Enrollment appointments enable you to manage and prioritize class enrollment processing for your students. PeopleSoft Student Records offers you the flexibility to assign enrollment appointments in mass through a process that you can run multiple times within the same term or to assign enrollment appointments on a student-by-student basis.

To create enrollment appointments:

1. Define on the Appointment Limits Table page all of the possible appointment limit IDs and their corresponding part-time and full-time maximum unit limits for each session of a term at your academic institution.
2. Define on the Appointment Table page the dates and times that are valid for each appointment limit ID.
3. Verify that all communication tables are properly set up for students to be notified of their enrollment appointments.
4. Run the Process Students Appointment process (SRAPPT) through the Enrollment Appointment component to assign enrollment appointments to groups of students, or run the process for individual students through the Student Enrollment Appointment page.
5. Review and update the enrollment appointments for individuals as necessary through the Student Enrollment Appointment page.

You can run the Process Students Appointment process as many times as needed within the same term and session, either adding new appointments or overlaying existing appointments. Each time you run the process, it produces a hardcopy report for you. The process also populates the communication table, providing you with the option to generate enrollment appointment notification mailers for your students. Each time you run the process, it repopulates the communication table with the newest enrollment appointment information.

Creating Enrollment Appointments

This section discusses how to:

- Define enrollment appointment limits.
- Define enrollment appointments.
- Create enrollment appointments in batch.
- Set up the communication tables.
- Set run parameters for the Process Students Appointment (SRAPPT) process.
- Set criteria and options for the Process Students Appointment process.
- Assign and maintain appointments for individual students.

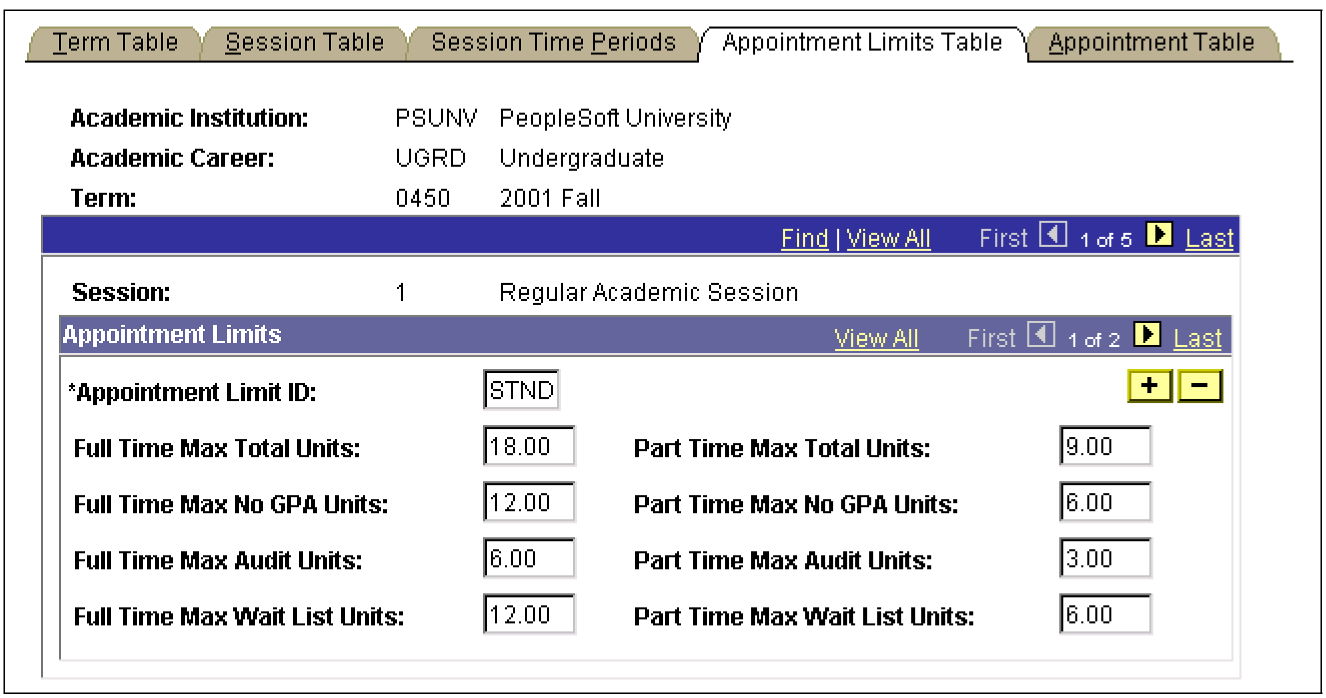
Pages Used to Create Enrollment Appointments

Page Name	Object Name	Navigation	Usage
Appointment Limits Table	APPT_LIMIT_TBL	Design Student Administration, Design Academic Structure, Setup, Term/Session Table, Appointment Limits Table	Define appointment limits IDs and the full-time and part-time maximum unit limits for each session of a term at your academic institution. You must define a separate appointment limit ID for each group at your academic institution that has varied enrollment unit restrictions.
Appointment Table	APPOINTMENT_TBL	Design Student Administration, Design Academic Structure, Setup, Term/Session Table, Appointment Table	Define enrollment appointments for the session. For each enrollment appointment, define the valid date and time ranges and assign the appropriate appointment limit ID. Regardless of whether you decide to assign appointments manually or through the Process Students Appointment process, you must create the parameters of each appointment ID on this page.
Create Appointments	CREATE_APPOINTMNTS	Design Student Administration, Design Academic Structure, Setup, Term/Session Table, Appointment Table, Create Appt.	Create a series of enrollment appointments in batch for a particular session.

Page Name	Object Name	Navigation	Usage
Enrollment Appointment	RUNCTL_SRAPPT	Manage Student Records, Manage Academic Records, Process, Enrollment Appointment, Enrollment Appointment	Set the run parameters for the Process Students Appointment process. These parameters help define the group of students for whom you want to assign enrollment appointments, as well as the assignment mode and the range of enrollment appointments to be assigned.
Enrollment Appointment 2	RUNCTL_SRAPPT2	Manage Student Records, Manage Academic Records, Process, Enrollment Appointment, Enrollment Appointment 2	Set selection criteria and options for the Process Students Appointment process.
Student Enrollment Appointment	STDNT_ENRL_APPT	Manage Student Records, Manage Academic Records, Use, Appointments, Student Enrollment Appointment	Assign enrollment appointments on a student-by-student basis. You can also use this page after you've run the Process Students Appointment process to verify that a student's appointments have indeed been scheduled and to edit a student's enrollment appointment as necessary.

Defining Enrollment Appointment Limits

Access the Appointment Limits Table page.



Appointment Limits Table page

When a student attempts to enroll in a class, the enrollment engine first compares the number of units in the student's enrollment request against the enrollment limits for the student's enrollment appointment (as defined on this page). If the student meets enrollment limit requirements for the appointment, the enrollment engine then looks at the session enrollment limits for the student's primary academic program (as defined on the Session page of the Academic Program Table component). If the student meets the enrollment limit requirements for the session, the system next looks at the term enrollment limits (as defined on the Enrollment page of the Academic Program Table component) and term unit limit overrides (as defined on the Enrollment Limit page of the Term Activation component) for the student's primary academic program. If the student meets the enrollment limit requirements for the term, the enrollment engine passes the student's enrollment request to the next stage of processing.

Appointment Limit ID	Enter an appointment limit ID for every group at your academic institution that has varied enrollment unit restrictions. For example, each appointment limit ID that you define might have different full-time and part-time maximum and minimum units.
Max Total Units	Enter the maximum number of units that a full-time and part-time student can enroll in during the specified enrollment appointment.
Max No GPA Units (maximum number of grade point average units)	Enter the maximum number of units that a full-time and part-time student can enroll in with a non-GPA grading basis during the specified enrollment appointment.
Max Audit Units	Enter the maximum number of units that a full-time and part-time student can audit during the specified enrollment appointment.
Max Wait List Units	Enter the maximum number of wait-list units that a full-time and part-time student can take during the specified enrollment appointment.

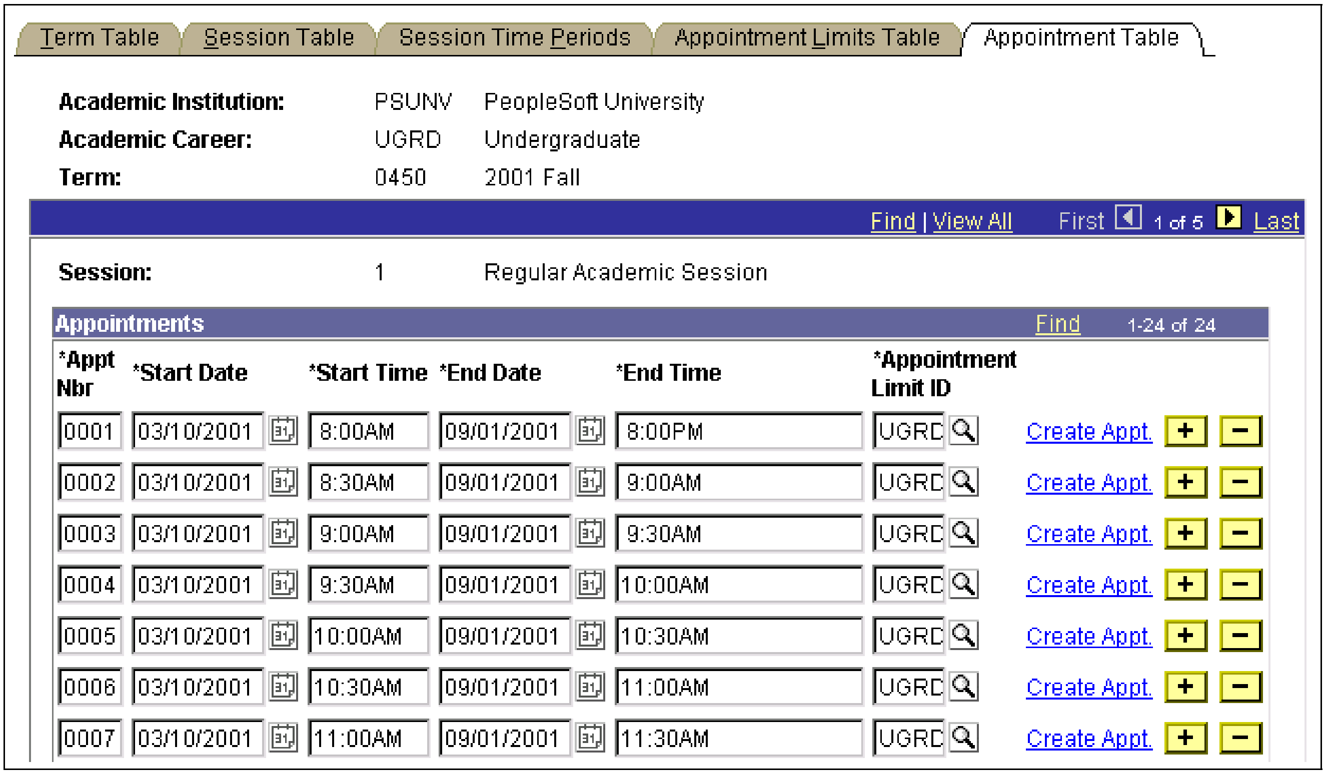
Example

For example, the registrar at PSUNV must create enrollment appointments on a ranking basis: seniors with a higher GPA enroll first, then seniors with a lower GPA. This same pattern works down to the freshman. Graduate students enroll any time. In addition, PSUNV limits the number of units in which a freshman can enroll. All other undergraduates require the same unit limit.

At least two appointment limit codes are required to represent the variable maximum units. In our example, it is not necessary to create an appointment code for graduate students because they can enroll at any time *and* because we have set the open enrollment date early enough on the Session Table page for the graduate academic career. Thus, we would create one appointment limit ID for freshman that specifies the appropriate unit limits, and a second appointment limit ID for all other undergraduates that specifies the appropriate unit limits. The mass enrollment appointment process handles the GPA ranking.

Defining Enrollment Appointments

Access the Appointment Table page.



Appointment Table page

Note. If you define on the Session Table page the first and last date when students can enroll into classes for the given session, the start and end date of enrollment appointments must be within that date range.

Appt Nbr (appointment number)
: The system by default sets the first appointment number to *0001* and increments the number by one for each additional enrollment appointment that you define for the session. You can override these default values. The system assumes appointments are assigned in numeric order. Therefore, appointment *0002* begins after appointment *0001.* Through the Enrollment Appointment and Student Enrollment Appointment pages, you can assign appointment numbers to students who qualify to be a part of the corresponding appointment Limit ID.

Appointment Limit ID
: Select the appointment limit ID that you want to associate with a specific enrollment appointment.

Create Appt. (create appointment)
: Click this link to access the Create Appointments page, where you can use a basis enrollment appointment to create a series of enrollment appointments in batch.

Creating Enrollment Appointments in Batch

Access the Create Appointments page.

Creation Basis Appointment
: This group box displays detail about the enrollment appointment that you want to use as the basis for the creation of a series of other enrollment appointments.

Time Increments in Minutes
: Enter the number of minutes that you want each enrollment appointment to last.

Last Appt of Day's Start Time (last appointment of day's start time)	Enter the start time for the last appointment of the day.
End Appt When Next Starts (end appointment when next starts)	Select to have the system schedule appointments immediately following one another. For example, a student might have an appointment from 9 a.m. to 9:25 a.m. The next student would have an appointment from 9:25 a.m. to 9:50 a.m.

Setting Up the Communications Tables

When you run the Process Students Appointment process for groups of students or individual students, the process populates the communications tables, providing you with the option to generate enrollment appointment notification mailers for your students. Each time you run the Process Students Appointment process, it repopulates the communication tables with the newest enrollment appointment information for the affected students. Before you run the Process Students Appointment process, you must define enrollment appointment mailers on the communications tables. We deliver an example enrollment appointment mailer that you can use as a model.

To set up an enrollment appointment mailer:

1. In the Build Community - Communications menu, use the Standard Letters page to create a standard letter for the enrollment appointment mailer, such as an *APP* letter.
2. Use the Communication Context page to define a communication context for the enrollment appointment mailer, such as *APPT1.*

   In the Communication Context Method group box, select in the Letter Code field the standard letter that you have defined for the enrollment appointment mailer, which in this example is *APP.*
3. Use the Communication Categories page to set up a communication category for Student Records, such as *SREC.*

   In the Communication Context group box, insert a row for the communication context that you have defined for the enrollment appointment mailer, which in this example is *APPT1*.
4. Use the Communication Speed Keys page to set up the administrative function for the enrollment appointment mailer, such as *STRM*.

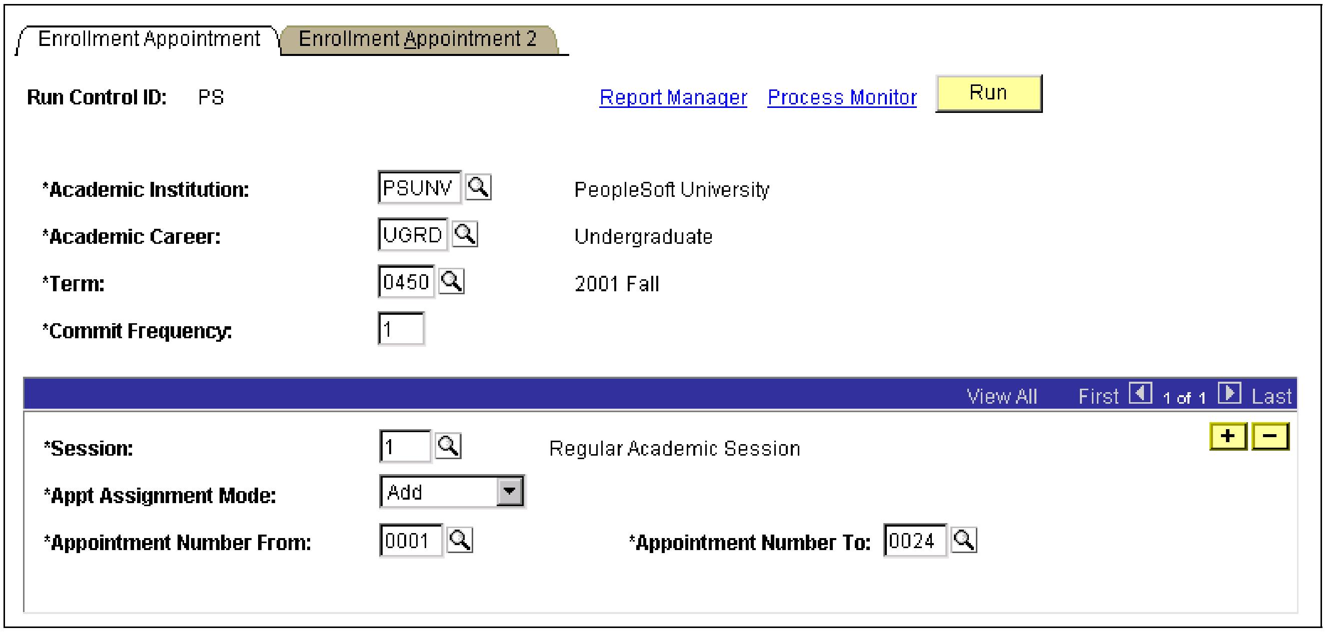
   In this example, you would set the Category field to *SREC,* the Context field to *APPT1*, and the Letter Code field to *APP.*

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Communications"

Setting Run Parameters for the Process Students Appointment Process

Access the Enrollment Appointment page.



Enrollment Appointment page

Academic Institution, Academic Career, and **Term**
Enter the values for which you want to assign enrollment appointments to students.

Commit Frequency
The system, by default, sets the commit frequency to *1.* The lower the commit frequency, the better the concurrence of data. While the higher the commit frequency enables faster processing of the job, the job could get tied up with another process. We recommend that you leave the commit frequency at *1.*

Session
Select the session for which you want to assign enrollment appointments to students.

Appt Assignment Mode (appointment assignment mode)
Select the mode in which you want the process to assign enrollment appointments to students. The process uses the appointment assignment mode to determine how to handle enrollment appointment assignments. Your choices are:

Overlay: The process assigns enrollment appointments to all students who meet the processing parameters, reassigning enrollment appointments to students within the parameters that have already been assigned an enrollment appointment.

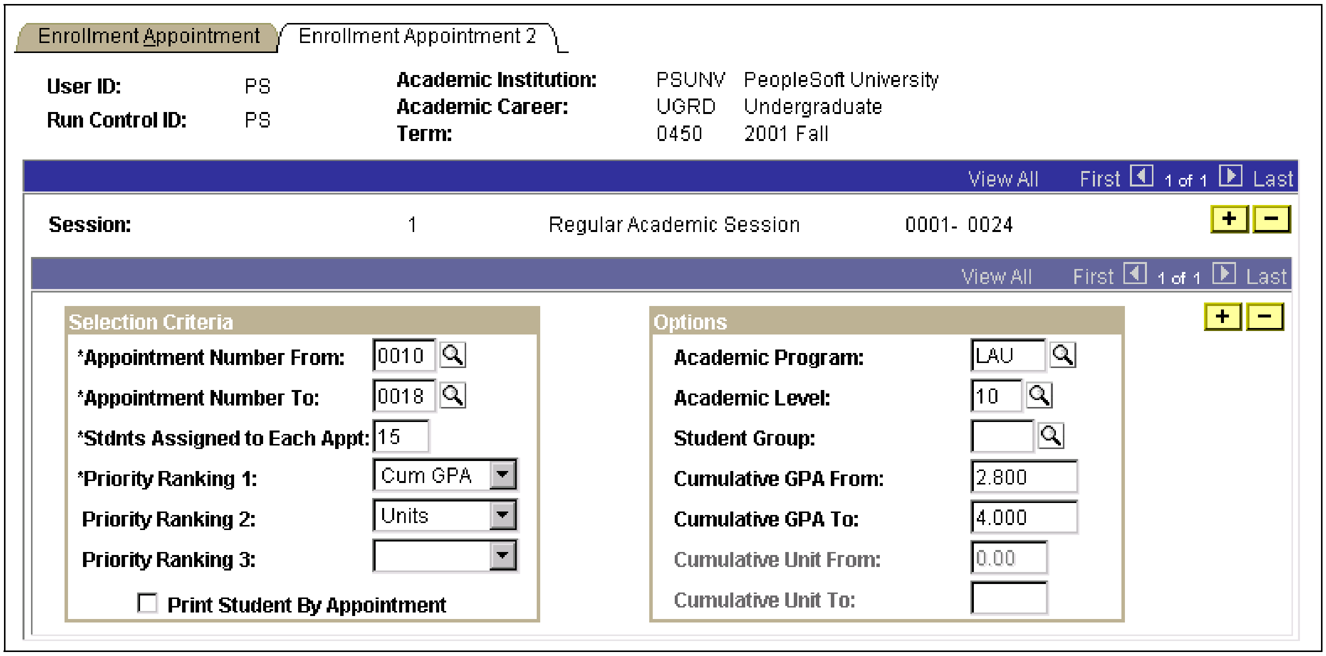
Add: The process assigns enrollment appointments to students only where the students that meet the processing parameters have yet to be assigned an enrollment appointment.

Appointment Number From
Select the enrollment appointment number within the specified session where you want the process to begin its assignment of enrollment appointments to students that meet the processing parameters.

Appointment Number To
Select the enrollment appointment number within the specified session where you want the process to end its assignment of enrollment appointments to students that meet the processing parameters.

Setting Criteria and Options for the Process Students Appointment Process

Access the Enrollment Appointment 2 page.



Enrollment Appointment 2 page

Selection Criteria

Appointment Number From

Select the enrollment appointment number within the specified range of session enrollment appointment numbers to further narrow where you want the process to *begin* its assignment of enrollment appointments for students that meet the processing parameters of this row of the request. The range of session enrollment appointment numbers for the process request is specified on the Enrollment Appointment page.

Appointment Number To

Select the enrollment appointment number within the specified range of session enrollment appointment numbers to further narrow where you want the process to *end* its assignment of enrollment appointments for students that meet the processing parameters of this row of the request.

Stdnts Assigned to Each Appt (students assigned to each appointment)

Enter the number of students that you want the process to include in each enrollment appointment that meets the processing parameters of this row of the request.

Priority Ranking 1, 2, and **3**

Select how you want to prioritize the assignment of enrollment appointments for this row of the process request. The Process Students Appointment process obeys these rankings when assigning enrollment appointments to students. Choose from:

Units: The Process Students Appointment process uses a student's total cumulative units (TOT_CUMULATIVE) as found on the student's career term record (STDNT_CAR_TERM). This includes a student's total transfer credit (TOT_TRNSFR), total other credit (TOT_OTHER), and total test score credit (TOT_TEST_CREDIT).

GPA: The Process Students Appointment process uses a student's total cumulative GPA (CUM_GPA) as found on the student's career term record. Inclusion of transfer credit, test credit, and other credit depend on how your institution sets up these various types of credit.

Academic Level: The Process Students Appointment process uses a student's academic level at term start (ACAD_LEVEL_BOT), as found on the student's career term record.

Print Student By Appointment — Select to have the process print a report of the students that were assigned enrollment appointments through this process request. The process prints the students' enrollment appointments in order of the appointment date and time. Clear this check box when you do not want the report to print.

Options

Academic Program — Select the academic program of students to which you want to restrict the assignment of enrollment appointments for this row of the process request.

Academic Level — Select the academic level of students to which you want to restrict the assignment of enrollment appointments for this row of the process request. If you select an academic level, the Cumulative Unit From and Cumulative Unit To fields become unavailable for edit.

Student Group — Select a student group by which the system should limit its appointment assignment.

Cumulative GPA From (cumulative grade point average from) — Select the cumulative GPA of students at which you want to the process to begin assigning enrollment appointments for this row of the process request.

Cumulative GPA To (cumulative grade point average to) — Select the cumulative GPA of students at which you want to the process to stop assigning enrollment appointments for this row of the process request.

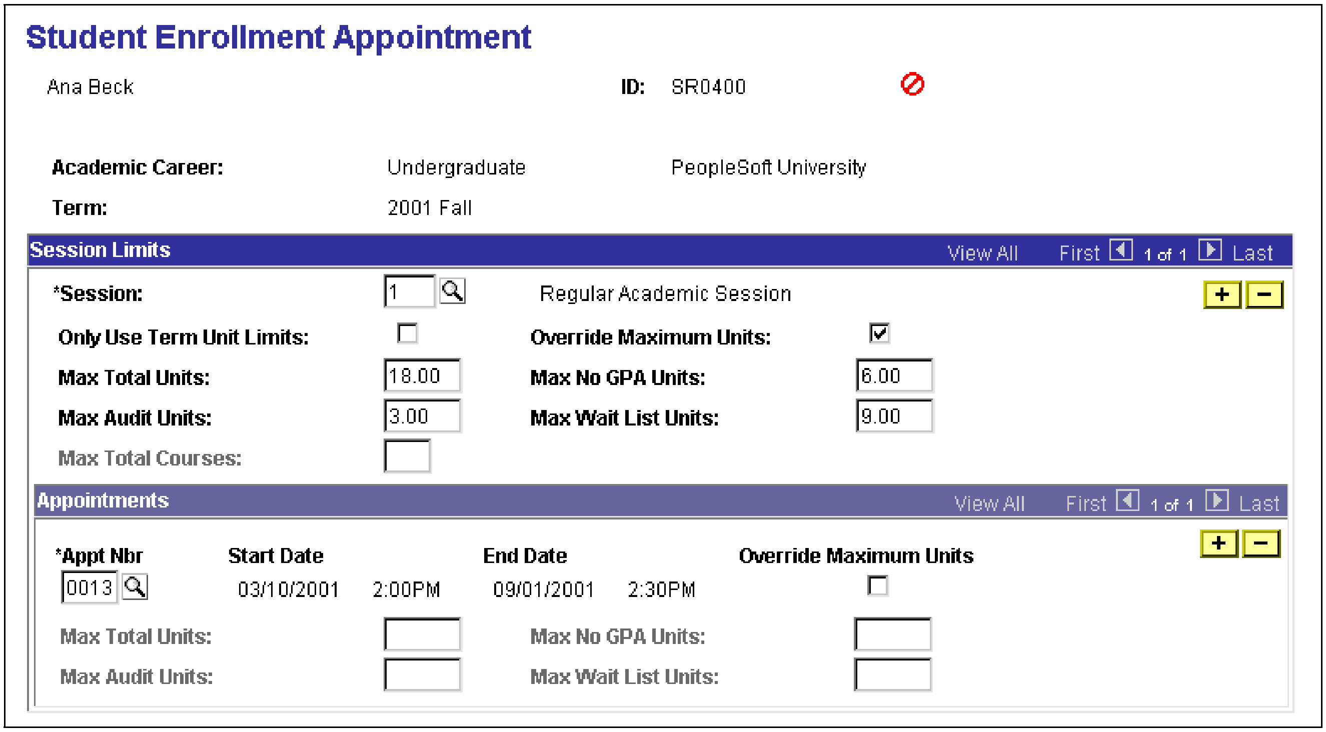
Cumulative Unit From — If you did not select an academic level, the Cumulative Unit From and Cumulative Unit To fields are available for edit. Select the cumulative units of students at which you want to the process to begin assigning enrollment appointments for this row of the process.

Cumulative Unit To — Select the cumulative units of students at which you want to the process to stop assigning enrollment appointments for this row of the process.

Run the Process Students Appointment process (SRAPPT) as needed. The process produces a hardcopy report for you that displays each student's appointment number, the time and date range of each appointment, the student's name, and the student's ID. The process also populates the communication table with students for whom you have generated appointments so that you have the option to generate enrollment appointment notification mailers to inform your students. The mailer contains the date, student's name and address, salutation, enrollment appointment information, and instruction on how the student can enroll in classes during appointment time. You can make changes to the mailer.

Assigning and Maintaining Enrollment Appointments for Individual Students

Access the Student Enrollment Appointment page.



Student Enrollment Appointment page

Session

Select the session for which you want to assign enrollment appointments to the student.

Only Use Term Unit Limits

Select to use only the term unit limits defined on the Appointment Limits Table page for this academic career, term, and session.

Override Maximum Units

Select to override the session unit limits set for the student's primary academic program of the enrollment term. When you click the Refresh or Save buttons, the system makes available the Max Total Units, Max Audit Units, Max No GPA Units, and Max Wait List Units fields and displays the values set on the Session page of the Academic Program Table component. You can then override the values for this student's enrollment appointment. If you are assigning a new enrollment appointment to the student and you want to use this override, you must first select this check box and save the page. Clear this check box to use the previously defined session unit limits set for the student's primary academic program of the enrollment term.

Note. Selecting this check box does not override a student's term unit limits for the student's primary academic program within the enrollment term, as set on the Enrollment page of the Academic Program Table component.

Max Total Units

Enter the maximum number of units that the student can enroll in for all of the enrollment appointments within the specified session.

Max No GPA Units (maximum number grade point average units)	Enter the maximum number of units that the student can enroll in with a non-GPA grading basis for all of the enrollment appointments within the specified session.
Max Audit Units	Enter the maximum number of units that the student can take audit for all of the enrollment appointments within the specified session.
Max Wait List Units	Enter the maximum number of wait-list units that the student can take for all of the enrollment appointments within the specified session.
Max Total Courses	The system by default displays the maximum number of courses that this student can take for the specified session. The system determines this value according to the maximum courses that a student can take for the specified session *and* the term category of the specified term, as defined for the student's primary academic program for the specified term. Set total maximum course values by academic load for term category and session combinations within an academic program on the Course Count Limits page of the Academic Program Table component. If you have cleared the Only Use Term Limits check box for the specified session on the Session Enrollment Limits page, this field is unavailable.
Appt Nbr (appointment number)	Select the appointment number that you want to assign to the student. The system prompts you to select an appointment number from the list of values defined for the specified session on the Appointment Table page. The system displays the start and end dates and times of the enrollment appointment that you select, as well as the unit maximums associated with the enrollment appointment and based on the student's academic load.
Override Maximum Units	Select to override the unit maximums set for the enrollment appointment on the Appointment Limits Table page. When you click the Refresh or Save buttons, the system makes available the Max Total Units, Max Audit Units, Max No GPA Units, and Max Wait List Units fields and displays values according to the student's academic load and the session limits specified for the enrollment appointment's ID on the Appointment Limits Table page. You can then override the values for this student's enrollment appointment. If you are assigning a new enrollment appointment to the student and you want to use this override, you must first select this check box and save the page. Clear this check box to use the previously defined session unit maximums set for the enrollment session.
Max Total Units	Enter the maximum number of units that the student can enroll in during the specified enrollment appointment.
Max No GPA Units	Enter the maximum number of units that the student can enroll in with a non-GPA grading basis during the specified enrollment appointment.
Max Audit Units	Enter the maximum number of units that the student can audit during the specified enrollment appointment.
Max Wait List Units	Enter the maximum number of wait-list units that the student can take during the specified enrollment appointment.

Viewing Enrollment Appointments Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

This section discusses how students can use the View Enrollment Appointment self-service pages to view their enrollment appointments for a specific term in which they are registered to enroll in classes. Advisors can also view information on this page.

Pages Used to View Enrollment Appointments Through Self-Service

Page Name	Object Name	Navigation	Usage
Enrollment - Select Enrollment Term	SS_ENRL_REQ_TERMS	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to select the term for which they want to submit an enrollment request or view enrollment appointments.
Enrollment Appointment - View Details	SS_ES_ENRL_APPT	SA Self Service, Learner Services, Academics, View Enrollment Appointment	Students can view detail information about their enrollment appointment, such as start date, end date, start time, end time, and unit limits.

CHAPTER 24

Processing Class Enrollment Transactions

Once you have scheduled classes for a term, activated students into that term, and assigned enrollment appointments, you are ready to enroll students into classes. PeopleSoft Student Records has flexible and robust enrollment processing where all the rules you have set up in your schedule of classes and course catalog come to fruition.

This chapter provides an overview of class enrollment processing and discusses how to:

- Process enrollment transactions through the Quick Enroll component.
- Process enrollment transactions through the Enrollment component.
- Process enrollment transactions through the Block Enrollment feature.
- Process enrollment transactions through the Enrollment Request component.
- Process enrollment transactions through the PeopleSoft Learner Services application.
- Post enrollment requests in mass.
- Add transcript notes to enrollment requests.
- View user access to enrollment functions.
- View enrollment request messages.

Understanding Class Enrollment Processing

This section lists discusses:

- Class enrollment processing.
- Enrollment request processing for drops.
- Date and time stamps on student enrollment records.

Important! There are numerous common page elements shared between the various enrollment components. We explain all page elements for the Quick Enroll component. For other enrollment components, however, we refer you back to the discussion of the Quick Enroll component for descriptions of these common elements. Therefore, a knowledge of the page elements in the Quick Enroll component is essential to understanding the functionality of the page elements in all enrollment components.

Class Enrollment Processing

The class enrollment processing tools in PeopleSoft Student Records provides maximum flexibility when dealing with enrollment transactions and other enrollment-related activities. There are five components and one collaborative application that you can use to process enrollment transactions, all of which post enrollment records to the same table (STNDT_ENRL).

You can process enrollment requests on a student-by-student basis through the Quick Enroll and Enrollment Request components. You can process enrollment requests for blocks of students and classes through the Block Enrollment component. Through the Mass Enrollment component, you can post a range of enrollment requests. Enrollment requests from all of these components go through the powerful enrollment engine during the posting process. The enrollment engine verifies that for every class requested, the student meets all rules for requisites, deadlines, permissions, and so on. Optionally, the enrollment engine also warns of potential repeats.

The Enrollment component, in contrast, bypasses the enrollment engine and all of its checkpoints, posting enrollment transactions directly to a student's enrollment record as soon as you save the data in the component. The Enrollment component is intended for use by only a select few power users at your academic institution and should not be made available to a wide user population.

If your academic institution has licensed the PeopleSoft Learner Services collaborative application, your students can also submit enrollment requests over the internet during their scheduled enrollment appointment times. These requests function the same as all other enrollment requests in your PeopleSoft Student Administration system, writing data directly to your application tables.

When a user submits an enrollment request for an Open Entry/Exit (OEE) class, the enrollment engine evaluates the student's primary academic program to verify that the academic program permits OEE enrollment. If the academic program does not permit OEE enrollment, the system returns an error message notifying the user that enrollment is not allowed in the chosen class. If the academic program does permit OEE enrollment, the enrollment engine then performs all of the existing edits as usual (such as class limits and requisite checks).

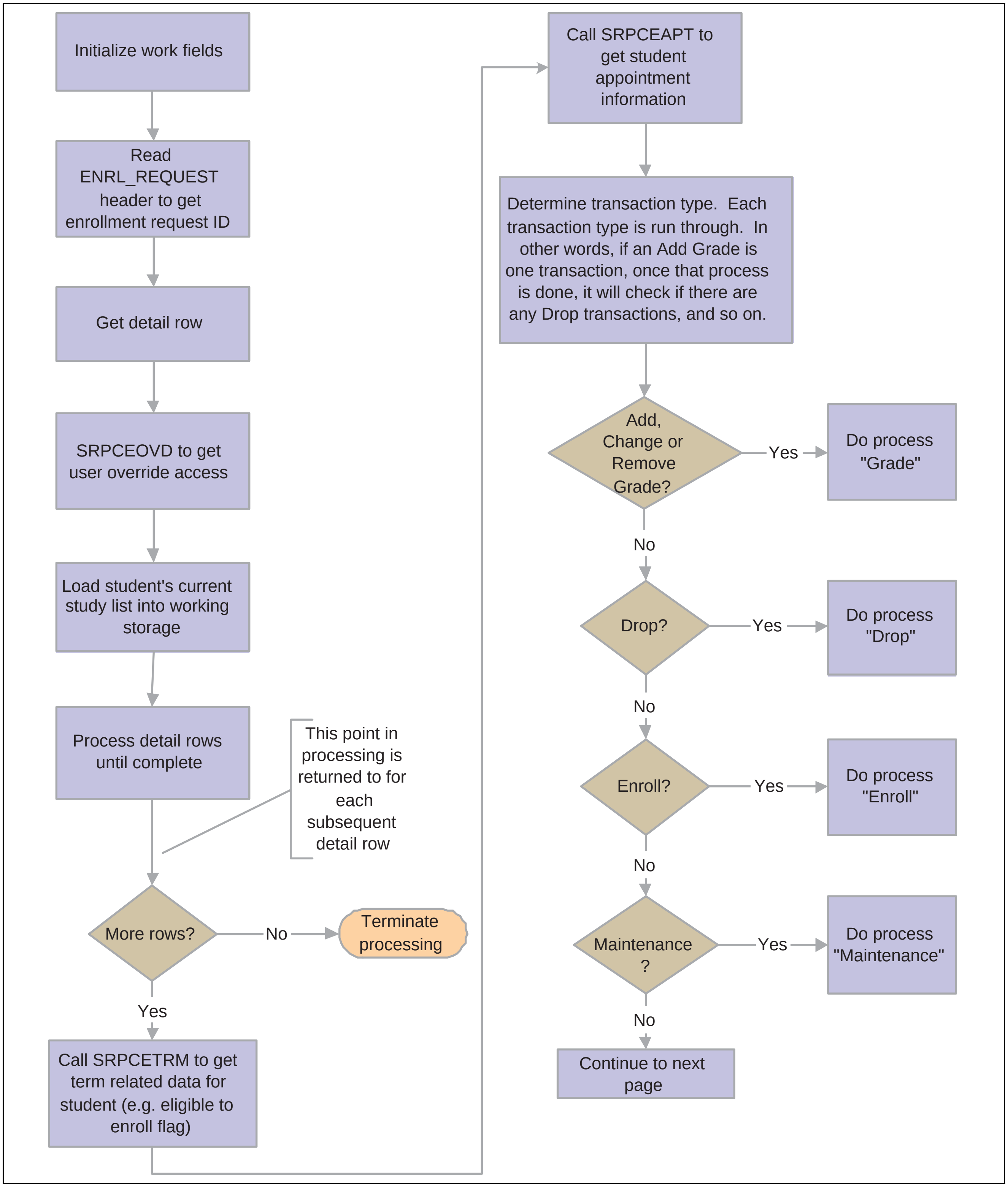
If the request successfully passes these edits, the enrollment process uses the OEE dynamic date rule assigned to the class to calculate a class end date and all the other dynamic calendar dates for the student. If no OEE dynamic date rule has been defined for the class, the enrollment process uses the rule established for the course offering. If no rule exists for the course offering, the request fails and the process returns an error message.

If the request is successful, you can view the dates calculated by the process using the academic calendar link on the Study List or by accessing the Student OEE Enroll Data page.

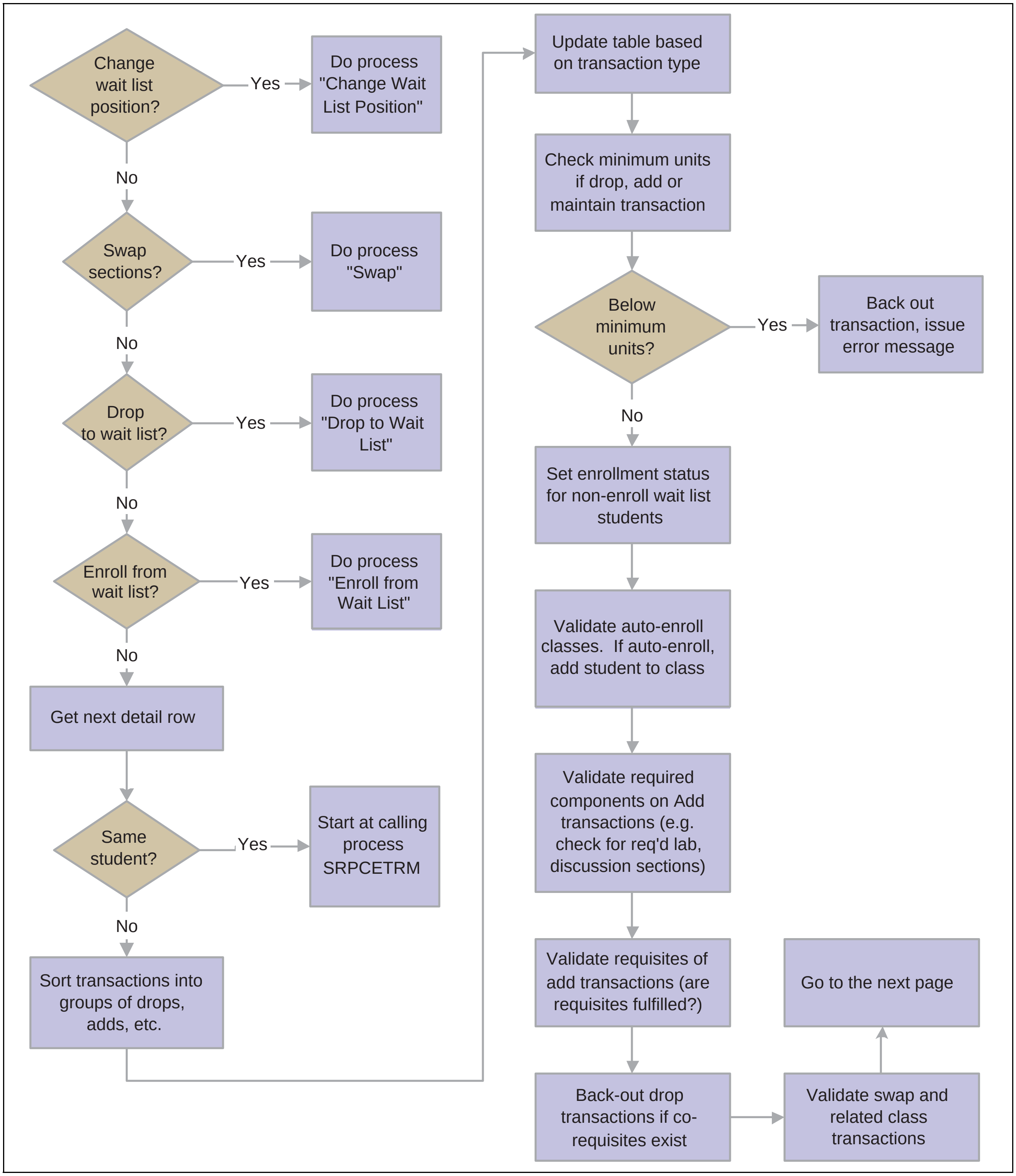
To submit an enrollment transaction for a student, the student must have a personal data record, have been activated in an academic program within the academic career to which the classes belong, and have been activated in the necessary term for that same academic career.

Diagram of Enrollment Engine Logic

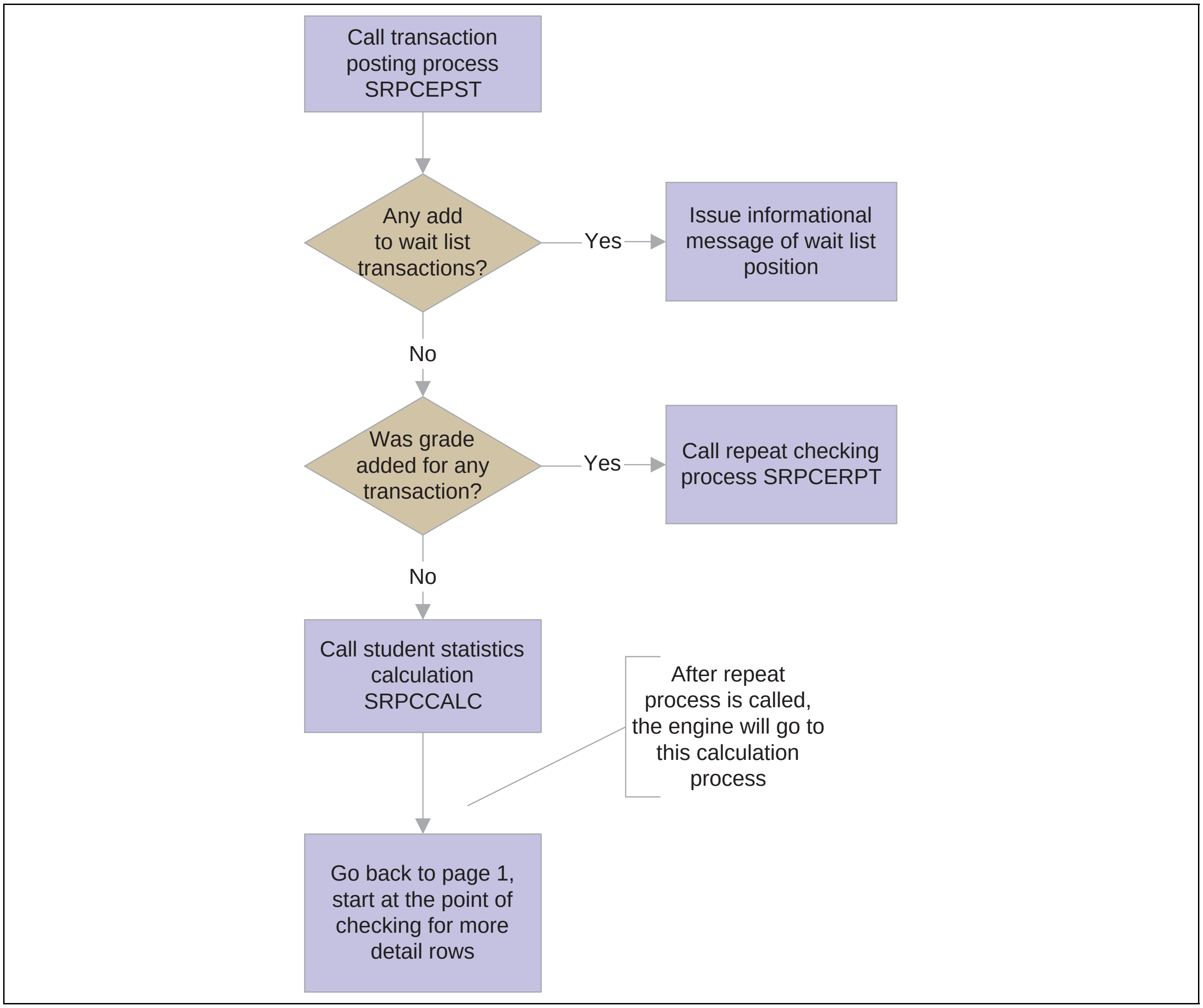
The following diagram shows a high-level process flow of the enrollment engine:



Enrollment Engine Logic 1 of 3



Enrollment Engine Logic 2 of 3



Enrollment Engine Logic 3 of 3

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Dynamic Academic Calendars"

Enrollment Request Processing for Drops

When processing enrollment requests with an enrollment action of drop through the Quick Enroll, Enrollment Request, and Block Enroll components or the self-service collaborative application, the enrollment engine must determine the drop deadlines, reasons, grading bases, and grades with which to update the impacted student enrollment records (STDNT_ENRL).

The enrollment engine determines drop deadlines, grading bases, and grades differently depending on the class enrollment type (traditional, dynamic date, open entry/exit).

When requesting to drop a traditional class enrollment, the enrollment engine:

- Determines the deadlines according to the values set on the Academic Calendar 2 page.

- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Session Calendar 2 page.

When requesting to drop a dynamic date class enrollment, the enrollment engine:

- Determines the deadlines according to the values that the Dynamic Class Dates process calculates and displays on the Dynamic Class Data page.

  If you have not calculated the academic calendar dates for the class, the enrollment engine determines the deadlines according to the values set on the Academic Calendar 2 page.

- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  - If there is no grade set on that page and you *have* calculated the academic calender dates for this class, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If there is no grading scheme and grade set on that page, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.
  - If there is no grade set on the Grading Scheme Table page and you *have not* calculated the academic calender dates for this class, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

When requesting to drop an open entry/exit class enrollment, the enrollment engine:

- Determines the deadline according to the values it calculates upon enrollment and displays on the Student Enroll OEE page.

  If the deadlines have not been calculated, the request fails.

- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If there is no grading scheme and grade set on that page, the request fails.

Regardless of the class enrollment type, the enrollment engine determines the reason according to the enrollment action reason that you enter on the enrollment processing page. If you do not enter a value on the enrollment processing page, then, for drop transactions during the drop retain record period only, the enrollment engine uses the reason set on the Session Calendar 2 page. Otherwise, the engine assigns no reason.

If your institution wants to retain student enrollment records during the drop delete period, you can simply add a enrollment action reason to the drop and it will be retained subject to the time period associated with the enrollment action reason.

Note. The enrollment engine does not prevent enrollment request transactions after the drop deadlines. If you submit a request to drop after the latest drop deadline, the enrollment engine displays a message that the latest drop deadline has passed and allows you to choose to continue with the processing.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Defining Traditional Academic Calendars,” Setting Up Session Drop Dates

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Establishing Terms and Sessions,” Creating Enrollment Action Reasons

Date and Time Stamps on Student Enrollment Records

Whenever you post an enrollment transaction that adds, drops, or updates a student enrollment record (STDNT_ENRL), the system populates the appropriate, enrolled, dropped, or updated row with date and time stamps based on the system date. These values are not viewable on any application pages. PeopleSoft Student Financials uses these date and time stamps to correctly calculate adjustments in situations where your academic institution charges by term and adjusts by session. Classes are associated with sessions. The date and time stamp fields are as follows:

Field	Description
LAST_ENRL_DT_STMP	The date of the last enroll action or equivalent action.
LAST_ENRL_TM_STMP	The time of the last enroll action or equivalent action.
LAST_DROP_DT_STMP	The date of the last drop action or equivalent action.
LAST_DROP_TM_STMP	The time of the last drop action or equivalent action.
LAST_UPD_DT_STMP	The date of the last action.
LAST_UPD_TM_STMP	The time of the last action.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, “Setting Up Tuition Controls, Criteria, Equations, and Waivers,” Setting Up Adjustment Calendars

Processing Enrollment Transactions Through the Quick Enrollment Component

This section provides an overview of the Quick Enroll component and discusses how to add or update quick class enrollment requests.

Understanding Quick Enroll

The Quick Admit use component, Quick Enroll component, and Quick Admit process component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you'll use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick enrolled might be useful for various funnel reports.

The Quick Admit use component and Quick Enroll component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes—all in a matter of minutes.

Important! The PeopleSoft Recruiting and Admissions PeopleBook documentation for the Quick Admit use component and Quick Admit process component is essential reading for understanding how to quickly admit and enroll students. PeopleSoft recommends that you read that documentation to fully grasp the potential of the Quick Enroll component.

The Quick Enroll component enables you to enter, update, and post class enrollment requests for both new and continuing students on a student-by-student basis. The Quick Enroll component has the exact same functionality as the Enrollment Request component, using the same enrollment engine processing and performing the same edit checks. Transactions entered into the Quick Enroll component can be accessed through the Enrollment Request component and vice versa, giving you more flexibility and control over your enrollment requests.

Note that you cannot use the Quick Enroll component to view enrollment transactions processed through the Enrollment page because those transactions do not generate an enrollment request, nor can you view enrollment transaction processed through the Block Enrollment component because those transactions have more than one ID associated with the enrollment request. You can view The latter two enrollment sources only through their respective components.

When you access the Quick Enroll component, a dialog box prompts you to enter the key values of the transaction. The key values are:

ID	Choose from a list of existing student IDs.
Academic Career	Select the academic career to which you want to add or update enrollment requests for the specified student. The system prompts you with only the academic careers in which the student is active. You can activate students in academic careers through either the Quick Admit component or the Student Program/Plan component.
Academic Institution	Select the academic institution in which you want to add or update enrollment requests for the specified student.
Term	Select the term for which you want to add or update enrollment requests for the specified student. The system displays only the terms in which the student is active for the academic career that you have selected.
Enrollment Request ID	This identifies the enrollment request as unique from other enrollment requests. The Quick Enroll component uses enrollment request as a key to access transactions. In Add mode, this field is unavailable for edit because the system generates a unique enrollment request ID for you

	when you save the data in the Quick Enroll component. In other modes, select the enrollment request ID that you want to access.
OK	Click to open the component with the specified key values.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Adding and Updating Applications,” Adding New Prospects and Applications with Quick Admit

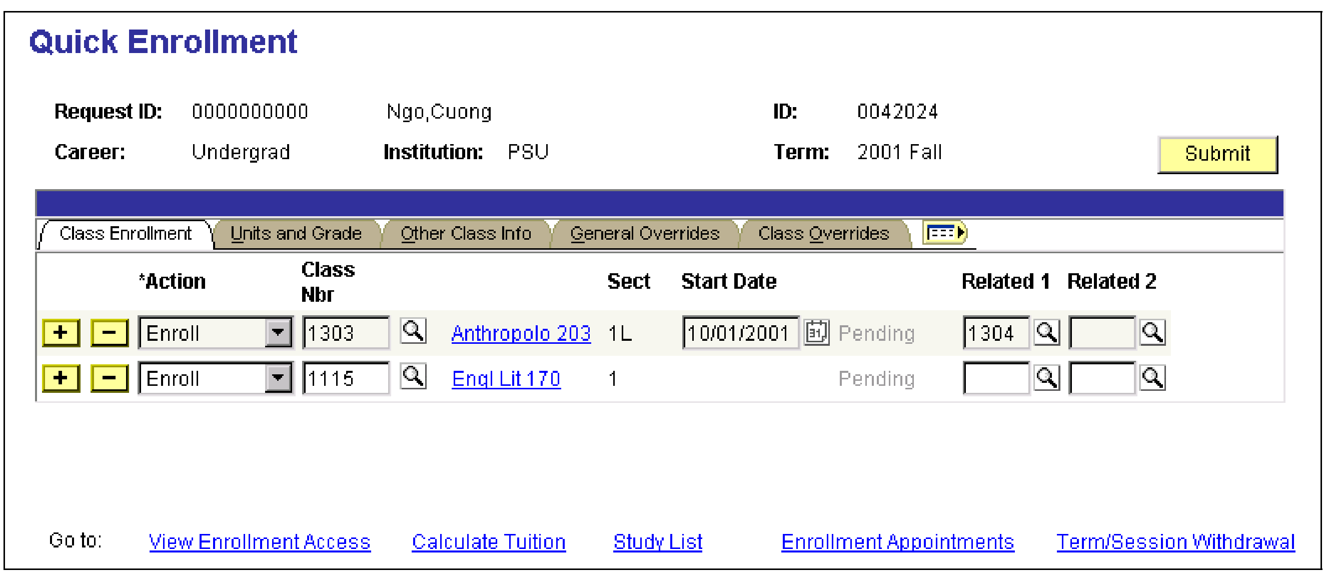
PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Services Data”

Page Used to Process Enrollment Transactions Through the Quick Enroll Component

Page Name	Object Name	Navigation	Usage
Quick Enrollment	QUICK_ENROLL3	Manage Student Records, Manage Academic Records, Use, Quick Enroll, Quick Enrollment	Add or update enrollment request transactions for both new and continuing students. The Quick Enroll component has the exact same functionality as the Enrollment Request component. Transactions that you process through the Quick Enroll component can also be accessed through the Enrollment Request component and vice versa.

Adding or Updating Quick Enrollment Requests

Access the Quick Enrollment page.



Quick Enrollment page

When you use this page for continuing students and a student has a positive or negative service indicator assigned to his or her record, the system displays the corresponding Service Indicator button at the top of the page. Click the button that appears to view the details of specific service indicators.

General Page Elements

Request ID

Identifies the enrollment request as unique from other enrollment requests. The Enrollment Request component uses enrollment request as a key to access transactions. In Add mode, this field is unavailable for edit because the system generates a unique enrollment request ID for you when you save the data in the Enrollment Request component. In other modes, select the enrollment request ID upon accessing the component.

ID

The ID of the student for whom you are submitting the enrollment request.

Career

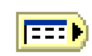
The academic career of the student for whom you are submitting the enrollment request.

Institution

The academic institution for which you are submitting the enrollment request.

Term

The term for which you are submitting the enrollment request.



Click the Show All Columns button to display all of the fields at the bottom of the page in a single, scrollable grid rather than in separate tabs.

Click the Show Tabs button to display all of the fields at the bottom of the page in separate tabs rather than a single, scrollable grid.

Submit

Click to process all non-posted rows of the enrollment request for the student. The enrollment engine performs validations as necessary at this time. If the enrollment engine encounters any errors, the system displays an enrollment request status of *Errors* on the corresponding row of the request. You can view the error messages in the appropriate row's Error Messages group box.

Note. You can also save the enrollment request and post groups of them on the Mass Enrollment page.

Class Enrollment Tab

Action

An enrollment action is the action performed on the enrollment record. The system by default sets the enrollment action for the request to *Enroll,* but you can override this default value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Select from the following choices.

Add Grd (add grade): Select to add a grade to the student's enrollment record for the corresponding class.

Change Grd (change grade): Select to change a grade on the student's enrollment record for the corresponding class.

Chg WL Pos (change wait list position): Select to change the student's wait list position for the corresponding class.

Drop: Select to drop the student from the corresponding class.

Drop to WL (drop to wait list): Select to drop the student from the corresponding class and move the student to the wait list for that class.

Enroll: Select to enroll the student into the corresponding class.

Warning! Enrollment request transactions with an action value of *Add Grade* or *Change Grade,* are the only types of transactions that create Student Incomplete rows when you assign an Incomplete grade (as defined on the Academic Program Table — Incomplete page). If you use an action of Enroll and populate the grade with an incomplete grade, the system does not create a Student Incomplete row.

Norm Maint (normal maintenance): Select to update the student's enrollment record for the corresponding class in normal maintenance mode. Items available for update include grading basis, units, permission, course count, notes, requirement designation, repeat code, and instructor ID. You can use the normal maintenance action to update these items, rather than dropping the class and re-adding it with the new information.

Remove Grd (remove grade): Select to remove a grade from the student's enrollment record for the corresponding class.

Swap: Select to enable the student to swap the corresponding class in which he or she is enrolled for a different class. The Change To field becomes available for you to enter the new class section in which the student wants to enroll. You can also use this option to swap a student's enrollment from one related class section to another related class section. List the enrollment class section in both the Class Nbr (class number) and Change To fields, select a different related class, then post the enrollment transaction.

You cannot use the swap option to add or drop optional non-enrollment component sections. For example, if a student enrolls in a class section without designating the optional non-enrollment component section as a related class, then you cannot use the swap option to add the optional non-enrollment component section to the student's enrollment record. Instead, you must drop the student from the enrollment section, then process another enrollment request to add the student back into the enrollment section and also the optional non-enrollment component section. Likewise, if a student initially enrolls in both the enrollment section and the optional non-enrollment component section but wants to drop the optional non-enrollment component section altogether, you must drop the student from both sections and process another enrollment request to add the student back into the enrollment section only.

Class Nbr (class number)

If you are submitting a new enrollment transaction, enter the number of the class for the term. The system generates a class number when you schedule classes for a term. The class number also appears on the schedule of classes.

If you do not know the class number from the schedule of classes, click the Search button to view the Basic Class Search page, where you can search the schedule of classes for the class that you want to use for the enrollment transaction.

Change To

This field becomes available when you select an enrollment action of swap. Enter the number of the new class in which the student wants to be enrolled.

Class Description

The class description link becomes available after you enter a class number. The text for this link changes according to the title of the class that you have selected. Click this link to access the Class Detail page, where you can view detail about the selected class.

Sect (section)

The system displays the section of the class that you have selected.

Start Date

When a student attempts to enroll in a class scheduled within an OEE session, the system prompts you to enter a class start date. The date that a student starts an OEE class drives the open entry/open exit processing. A class start date is required for enrollment in OEE classes.

End Date

If an OEE enrollment transaction successfully posts to a student's enrollment record, the system displays the calculated end date of the OEE class. The enrollment process calculates the end date and all the other dynamic calendar dates for the student based on the OEE dynamic date rule assigned to the class. If no OEE dynamic date rule has been defined for the class, the enrollment process uses the rule established for the course offering. If no rule exists for the course offering, the enrollment process fails the transaction and the system returns an error message.

You can view the other dynamic academic calendar dates that the enrollment process calculates for the student's OEE enrollment by clicking the academic calendar link on the Study List or by accessing the Student OEE Enroll Data page.

Status (unlabeled)

The system displays the status of the enrollment request.

Errors: The enrollment engine was unable to post the submitted enrollment request due to errors. Click this link to view the errors on the Enrollment Message Log page.

Pending: The enrollment request is pending submission for enrollment processing.

Messages: The enrollment engine was able to successfully post the enrollment request and has returned an informational message, such as the student's wait list position. Click this link to view the messages on the Enrollment Message Log page.

Success: The enrollment engine was able to successfully post the enrollment request.

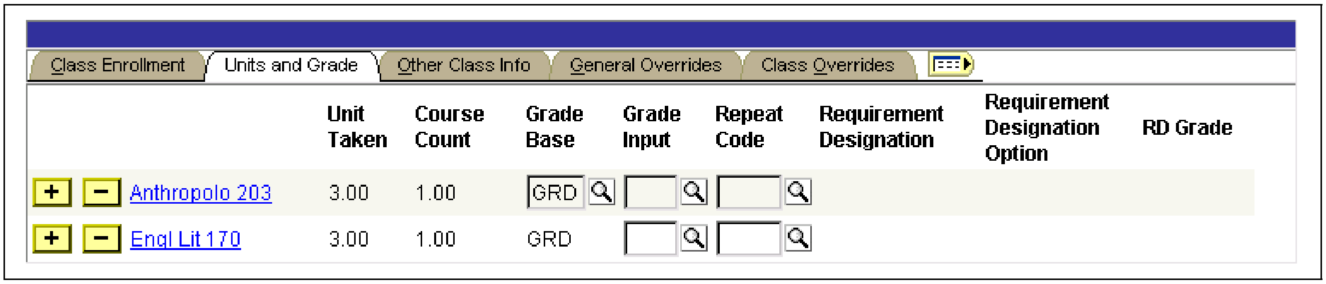
Related 1

If you have selected an enrollment action of *Enroll* or *Swap,* the Related 1 and Related 2 fields become available for edit. If the class has a related class that is not an auto-enroll class, select that class number in

	this field. The values that appear are those associated sections that are scheduled for the class in the schedule of classes.
Related 2	If the class has another related class that is not an auto-enroll class, select that class number in this field.

Units and Grade Tab

Select the Units and Grade tab.



Units and Grade tab

Unit Taken The system uses units taken to calculate the transcript GPA and the enrollment load. The enrollment engine uses units taken to calculate the number of units a student can take in a term. Units taken appear by default from minimum units on the Class Associations page. If minimum units and maximum units are different on the Class Associations page, then the class is defined to have variable units. This field becomes active, and you must enter the number of units the student chooses in this field.

Course Count Indicates the value of the course towards a degree. Some institutions count courses towards a degree as well as units towards a degree. This field indicates the value of the course towards degree progress. This field appears by default from the Course Count field on the Class Associations page.

Grade Base The system displays the grading basis for the class according to the value set in the corresponding field on the Class Components page of the Class Associations component. If your institution has set the grading basis of the class to *student option* on the Class Components page, then this field becomes available for edit and students can select their own grading basis. The system determines the prompt values according to the grading scheme for the academic career to which the course belongs, as defined on the Academic Career Table page. However, if your institution has mapped the grading basis from one academic career to another through a grading basis mapping rule (on the Career Pointer Exception Rule page), then the system determines the prompt values according to grading basis attached to the mapping rule.

Grade Input This is the final grade given to the student for the class. You can enter the grade here, or you can use the grade roster generator. When a grade is entered and posted, the system displays the grade here.

Note. Posting grades through the Quick Enroll, Enrollment Request, and Block Enrollment components automatically runs the repeat checking process if the Repeat Grade Check option is set to *all crse* (all courses) for the student's academic program.

Repeat Code

Select a repeat code for the enrollment transaction, if applicable.

Repeat codes work in conjunction with repeat rules to determine whether a repeated class violates your repeat policies. When the repeat checking process runs, it searches the student's enrollment history to find class enrollments with matching course IDs. When it finds a match, it determines whether the repeat is legal based on the repeat rules that you define.

As part of your repeat rule criteria, you can specify that any class enrollment into a course with a particular repeat code should be ignored by the repeat checking process. So, even if the class enrollment violates the total attempts criteria (for example) as defined in the repeat rule, the process won't consider it in violation of the rule, as long as the class enrollment contains the required repeat code.

For example, a repeat rule could specify that courses can be repeated only three times. However, you could stipulate that students can repeat the course more than three times if they have permission from the instructor. Thus, you could define a *PERM* (permission) repeat code and assign it to the class enrollment here. When the repeat checking process identifies this class enrollment as a repeat course, it looks to see if the PERM repeat code is assigned. If PERM is assigned, the repeat checking process won't consider this class enrollment in violation of the repeat rule.

You can also define your repeat rules so that the repeat checking process *requires* that a particular repeat code is assigned to a class enrollment for the repeated course to be evaluated in a particular repeat rule. For example, you could specify that any class enrollment with the ILGL repeat code assigned to it is in violation of the rule.

When the repeat checking process identifies a course that violates a repeat rule, the process assigns the class enrollment a repeat code. This repeat code determines how the class enrollment is treated in the student's academic statistics, such as whether the grade is used to calculate the student's grade point average. The repeat code that the repeat checking process assigns appears here.

Requirement Designation

Use this field to select a requirement designation for the class enrollment.

Requirement Designation Option

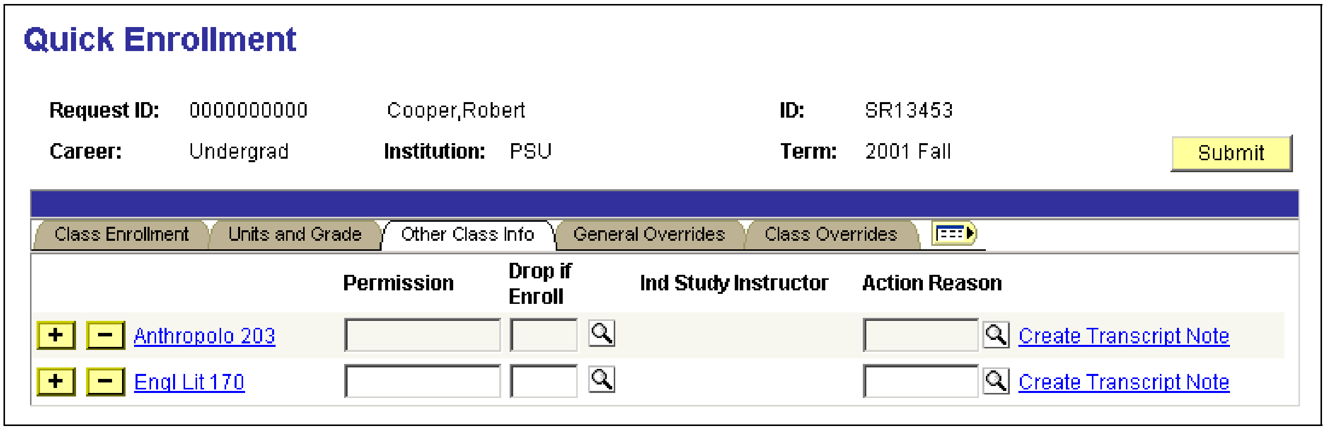
If there is a requirement designation specified for the corresponding row of the enrollment transaction *and* that requirement designation is at the student's option, select whether the student elects to take the requirement designation.

RD Grade (requirement designation grade)

You can enter the student requirement designation grade for the class enrollment on this page or through the grade roster. Usually, it is more convenient for you to enter grades for groups of students and classes through the grade roster. Your choices are *Satisfied* or *Not Satisfied.*

Other Class Info Tab

Select the Other Class Info tab.



Other Class Info tab

Permission

If the student has a general permission for enrollment, enter the number in this field. The system reserves the permission number for the student.

Drop if Enroll

The system displays this field only when the Action field is set to *Enroll.* Enter the number of the class section that the student wants to drop *only if* successfully enrolled in the class section that the student is currently requesting. If applicable, select the Wait List Okay check box. Submit the current enrollment request. If the requested class section is open, the enrollment engine immediately enrolls the student in the requested class section and drops the student from the class section that you enter in this field. If the requested class section is closed, you have selected the Wait List Okay check box, and there is an open wait list position in the requested class section, then the enrollment engine adds the student to the wait list for the requested class section and retains the student's enrollment in the class section that you enter in this field. When you later run the Wait List process (SRPCWAIT) for the requested class section and the process successfully enrolls the student in that section, the Wait List process then drops the student from the class section that you specify in this field.

Ind Study Instructor (independent study instructor)

If the Instructor Edit field on the Class Associations page is set to anything but *No Choice,* then this field becomes available for edit. Select the instructor ID responsible for the class if the class is an independent study.

Action Reason

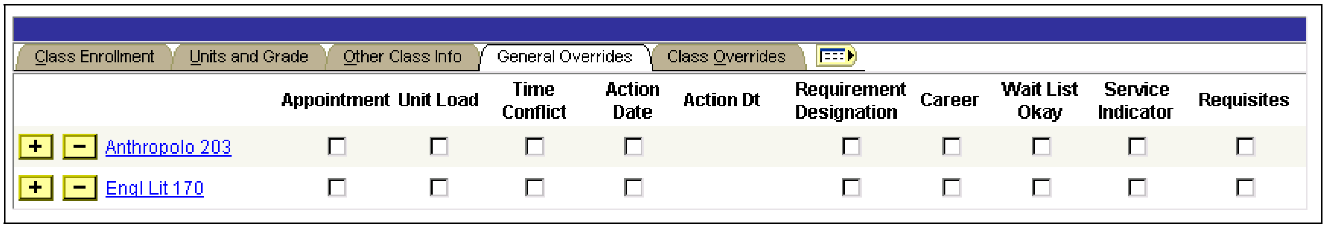
Select the enrollment action reason for the enrollment action. If you select a reason, the enrollment engine automatically retains the student enrollment record even if you are dropping a student from a class during the drop delete period. If you do not select a reason and you are dropping a student from a class during the drop retain record period, the enrollment engine uses the default reason set on the Session Calendar 2 page subject to the time period associated with that reason.

Create Transcript Note link

Click to access the Transcript Note page, where you can enter a free-form text that prints on the student's transcript for the class enrollment.

General Overrides Tab

Select the General Overrides tab.



General Overrides tab

Note. Only overrides that you are authorized to access are available.

Appointment Select to override the student's enrollment appointment date, time, and maximum enrollment units. This enables you to enroll the student in the class on the corresponding row of the enrollment request, regardless of the student's enrollment appointment.

Unit Load Select to have the enrollment engine skip all unit limit checks, including the unit load for the student's enrollment appointment, the term and session unit load, the term and session course count load, the term and session no grade point average (GPA) units, the term and session audit units, and the minimum unit enrollment check.

Time Conflict Select to disable time conflict checking for class sections when you process the enrollment request.

Action Date Select to override the action date. The Action Date field becomes available to edit.

Action Date Select the date that you want to use as the action date for processing this enrollment transaction. The action date is the date that you process the corresponding row of the enrollment transaction. The system records the action date to track the date that you process information. By default, the system uses the current system date. When you are processing an enrollment request and you select to override the action date, this field becomes available for edit.

Requirement Designation Select to override the requirement designation for the corresponding row of an enrollment request. The Requirement Designation field becomes available to edit.

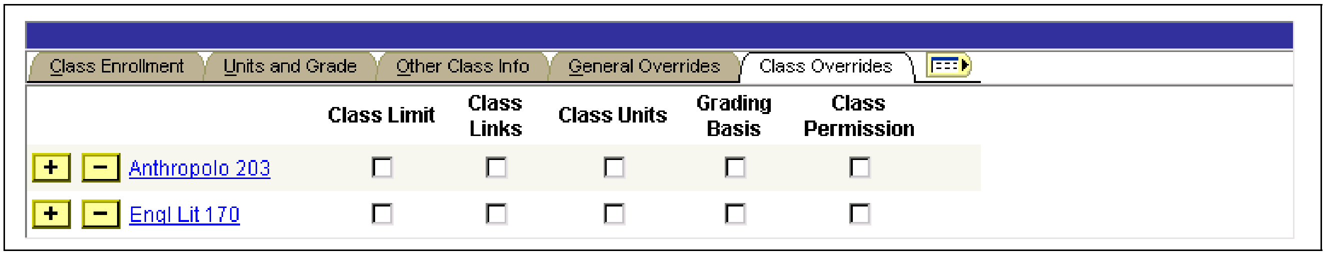
Career Select to override academic career pointers and career pointer exception rules for the student's academic career.

Service Indicator Select to override service holds that have been placed on the student's record.

Requisites Select to have the enrollment engine bypass requisite checking when you submit the corresponding row of an enrollment request for processing.

Class Overrides Tab

Select the Class Overrides tab.



Class Overrides tab

Note. Only overrides that you are authorized to access are available.

Class Limit

Select to override class section capacity, combined section capacity, and reserve capacity sizes. This enables you to enroll the student into a class even if the class is closed due to capacity size. Selecting this check box also enables you to drop a student to the wait list even if the wait list capacity is full.

Class Links

Select to allow students to add and drop class sections without having to do likewise for the required related component sections in a class association group, to allow students to enroll in a non-enrollment type section, and to allow multiple student enrollment in a course.

Class Units

Select to override the *Units Taken* field value for both fixed and variable unit classes.

Grading Basis

Select to allow students to enroll into a class with a grading basis other than the one established for the class. The Grading Basis field becomes available for edit so that you can select a different grading basis for the class enrollment.

Class Permission

Select to override general permission and student-specific permission requirements, academic career pointers, and career pointer exception rules.

Note. A student with a valid class permission can override course consent, academic career pointers, career pointer exception rules, class capacity size, and requisite checking.

Wait List Okay

Select to allow the student to wait list into a class section even if the class section, combined section, and reserve capacity are full provided that space is available on the wait list and the last date to wait list has not passed

Wait List Pos (wait list position) link

Click this link to access the Wait List Position page, where you can view the student's position on the wait list. This link is available only for enrollment requests in which the student is already on the wait list for the specified class section.

Go To Links

View Enrollment Access link

If your enrollment security is by enrollment access ID, click this link to access the Access to Enrollment Functions page, where you can view your security status for each enrollment function possibility.

Calculate Tuition link

Click to access the Tuition Calculation page, where you can calculate tuition for the student.

Tuition calculation is located within the Quick Enroll component because when you have changes to a student's academic status that can affect their charges for tuition and fees, you can perform the tuition calculation immediately without having to defer the task. However, tuition calculation is most likely performed by your Student Financials department and should be done by other users only if it concurs with your business rules.

The student must be active in at least one career and at least one term before you can use this page, but the student does not necessarily have to be enrolled in any classes. It is possible to calculate tuition for a student if your term fees are set up to use anticipated (projected) billing units. Also, you must have defined appropriate term fees and at least one tuition group.

Study List link
Click to access the Student Study List page, where you can view the student's class schedule for the specified term.

Enrollment Appointments link
Click to access the Student Enrollment Appointment page, where you can view the student's enrollment appointments for the specified term.

Term/Session Withdrawal link
Click to access the Term History component, where you can view all of a student's term statistics for each term of the student's academic career, withdraw the student from the specified term or session, and more.

See Also

Chapter 24, “Processing Class Enrollment Transactions,” Adding Transcript Notes to Enrollment Requests, page 554

Chapter 24, “Processing Class Enrollment Transactions,” Viewing Security Access to Enrollment Functions, page 554

Chapter 27, “Viewing Class Enrollment Data,” Viewing Student Study Lists, page 600

Chapter 23, “Managing Enrollment Appointments,” Assigning and Maintaining Enrollment Appointments for Individual Students, page 502

Chapter 26, “Using Enrollment Related Processes,” Processing Withdrawals and Cancellations, page 585

Chapter 24, “Processing Class Enrollment Transactions,” Pages Used to Process Enrollment Transactions Through Self-Service, page 551

Chapter 25, “Working With Enrollment Request Messages,” page 557

PeopleSoft 8 SP1 Student Financials PeopleBook, “Calculating Tuition and Fees”

Chapter 16, “Performing Repeat Checking,” page 343

Chapter 33, “Grading Students,” page 727

Chapter 17, “Managing the Schedule of Classes,” Searching for Classes, page 410

Chapter 17, “Managing the Schedule of Classes,” Understanding Class Permissions, page 392

Chapter 17, “Managing the Schedule of Classes,” Defining Auto Enroll Options and Capacity, page 367

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Student Records”

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Defining Dynamic Academic Calendars”

Processing Enrollment Transactions Through the Enrollment Component

The Enrollment component is similar to the Enrollment Request and Quick Enroll components but has some unique features that make it the most powerful component in which to process enrollment transactions. The Enrollment component enables you to:

- Bypass all requisite, requirement, deadline, and other rules.
- Post enrollment immediately when you save the transaction.

  It does this quickly because the system does not check the enrollment against all the rules that you set up.
- Skip the enrollment request process and post enrollment immediately.

To keep the powerful capability of this component secure and avoid complications in your enrollment business practices, grant access for this component only to a limited number of users, and these select few should use the component infrequently.

This section discusses how to:

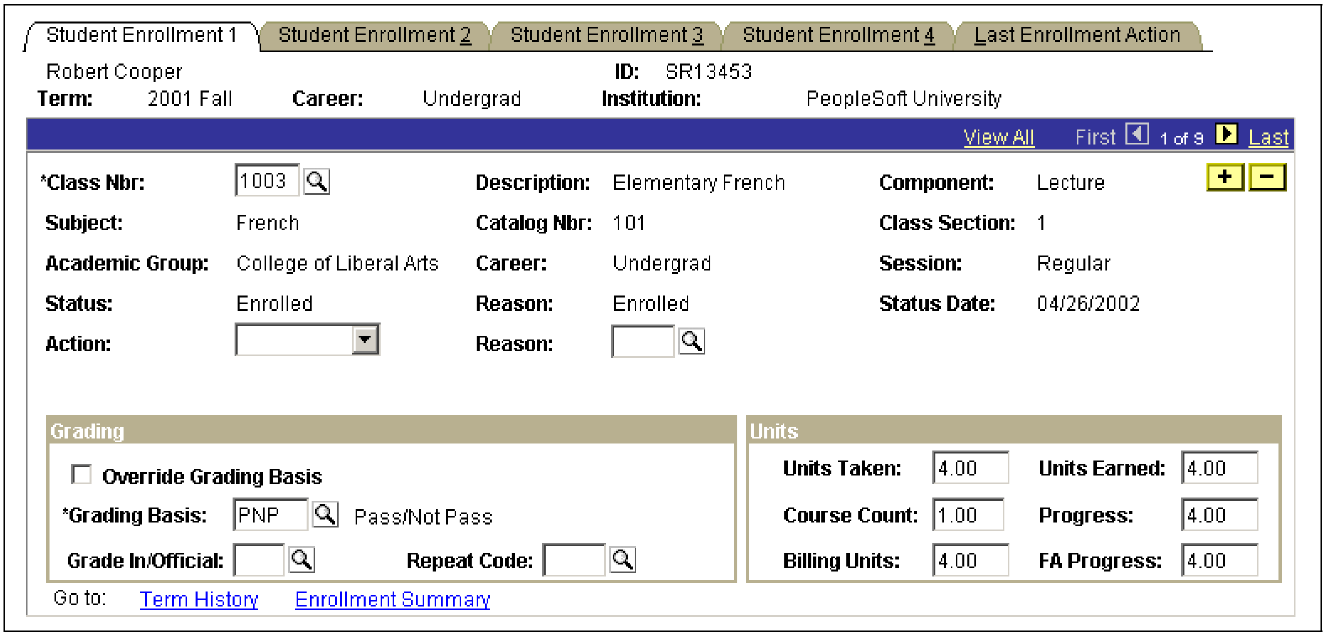
- Enter class enrollment information.
- View enrollment transaction information.
- Add transcript notes and text.
- Indicate requirement designation options and independent study instructors.
- View last enrollment action information.

Pages Used to Process Enrollment Transactions Through the Enrollment Component

Page Name	Object Name	Navigation	Usage
Student Enrollment 1	STDNT_ENRL1	Manage Student Records, Manage Academic Records, Use, Enrollment, Student Enrollment 1	Enter class enrollment information by student, bypassing all enrollment rules and requirements. Saving this page posts the enrollment transaction to the student's enrollment record.
Student Enrollment 2	STDNT_ENRL2	Manage Student Records, Manage Academic Records, Use, Enrollment, Student Enrollment 2	View information about adds, drops, and other items for enrollment transactions processed through the Enrollment component.
Student Enrollment 3	STDNT_ENRL3	Manage Student Records, Manage Academic Records, Use, Enrollment, Student Enrollment 3	Add transcript notes and text to a student's enrollment record for an enrollment transaction processed through the Enrollment component.
Student Enrollment 4	STDNT_ENRL4	Manage Student Records, Manage Academic Records, Use, Enrollment, Student Enrollment 4	Indicate options for requirement designations and assign an independent study instructor to enrollment transactions processed through the Enrollment component.
Last Enrollment Action	STDNT_ENRL_LAST	Manage Student Records, Manage Academic Records, Use, Enrollment, Last Enrollment Action	View information about the last enrollment action processed on a student's enrollment record through the Enrollment component. The page provides a basic audit trail of information about the most recent enrollment action.

Entering Class Enrollment Information

Access the Student Enrollment 1 page.



Student Enrollment 1 page

Calculate End Date

This button becomes available when you select to add a class section within an OEE session and you enter a value in the Start Date field. Click this button to have the system calculate the end date of the OEE class section based on the start date that you enter.

Class Nbr (class number)

Select the class in which you want to add or drop the student. The system displays class values for the following according to the schedule of classes and class associations: *Description, Component, Subject, Catalog Nbr* (catalog number), *Class Section, Academic Group, Career, Session, Grading Basis, Units Taken, Units Earned, Course Count, Progress, Billing Units, FA Prgrss.*(financial aid progress)

Status

The system displays the student's current enrollment status in the class section. The system sets the student's status based on the enrollment action that you process. If you have added or are adding the student to the specified class section through this component, the system displays the status as *Enrolled.* If you have dropped the student from the specified class section through this component, the system displays the status as *Dropped* up through the drop retain record period. After this period has passed, the system displays the status as *Enrolled* and assigns the corresponding penalty grade to the student enrollment record.

Valid statuses are Enrolled, Waiting, and Dropped.

Reason

The system displays the reason associated with the student's current enrollment status in the class section. If you have added or are adding the student to the specified class section through this component, the system displays the reason as *Enrolled.* If you have dropped the student from the specified class section through this component, the system displays the reason as *Dropped (was enrolled).*

Status Date

The date that you process the enrollment transaction for the corresponding row of the request. The system records the status date to track the date that you process information. The system uses the current system date for new enrollment transactions.

Action

Select from the following choices the action to perform on the enrollment record. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Choices are as follows:

Drop: Select to drop the student from the corresponding class section.

Manual Add: Select to manually enroll the student into the corresponding class section, bypassing all enrollment rules and requirements.

Reason

If you are dropping the student from the specified class section, select the reason for the enrollment action, such as whether the student is dropping the class or the class has been canceled. A reason value is not required.

Grade In / Official

The grade in is the final grade given to the student for the class. You can enter the grade here, or you can use the grade roster generator. When a grade is entered and posted, the system displays the grade here.

Note. Posting grades on the Student Enrollment 1 page *does not* automatically run the repeat checking process.

The grade lapse process does not include incomplete grades entered on the Student Enrollment 1 page.

The grade official is the official grade for calculation and transcript purposes. The Grading Basis automatically translates the grade In to another value in this field, if appropriate.

Units Earned

The system uses units earned to determine academic level, as well as to grant actual credit to the student. This field is separate from units taken to accommodate the granting of partial credit for a class while continuing to have the class count fully towards GPA, academic load, or billing. Units earned default from units taken. When you add an enrollment for a student using another enrollment component, the units earned also defaults to the same value as units taken. Regardless of the enrollment component, you must adjust units earned on the Student Enrollment 1 page.

Note. Units earned may be entered at any time, although they won't apply to a student's transcript until the class is graded.

Progress

Indicates the number of units the system uses, in conjunction with the billing factor, to calculate billing units. The system also uses progress units to calculate academic load. The system by default sets the value of this field to the academic progress units value on the Class Associations page.

Billing Units	In PeopleSoft Student Financials, all per unit term fees, per unit course fees, and per unit class fees are driven off of the billing units. Billing units are calculated for an enrollment record by multiplying the billing factor, which is set on the Class Associations page, and the academic progress units for the selected class. Because the system by default sets the billing factor *1,* billing units are usually equal to academic progress units. The Student Enrollment 1 page is the only place where you can override billing units for an individual enrollment. For example, if you set the billing factor to *2* and the academic progress units to *3,* the billing units would be *6.* This would be multiplied by whatever amount per billing unit you establish in PeopleSoft Student Financials. But if you want to discount the class for a specific student, you could change the billing units here on the Student Enrollment 1 page back to *3.*
FA Progress (financial aid progress)	Indicates units towards financial aid progress.
Term History link	Click to access the Term History component, where you can view all of a student's term statistics for each term of the student's academic career, withdraw the student from the specified term or session, and more.
Enrollment Summary link	Click to access the Enrollment Summary component, where you can view a summary of a student's enrollment information and term statistics.
Save	Click to post enrollment immediately to the student's enrollment record.

Warning! The system performs no checks against your enrollment rules.

Understanding Units Taken and Units Earned

The partial credit feature is designed for special situations when students earn fewer units than they attempt and only part of the credits for a class are applied to term and cumulative totals. For example, if a student takes both Math 100 and Math 101, users can adjust the Units Earned field for the latter course and grant only partial credit. This enables users to apply a special set of business rules to accommodate transfer work, classes that cover similar course work, and so on.

To make the adjustment, use the Units Earned field on the Student Enrollment 1 page. Although this value defaults from the Units Taken field, you can alter it to reflect only the units the student earns once the course is graded. Statistics are calculated using the Units Taken field. However, in a number of important places, the system uses the Units Earned field. Please read further for a discussion of where these changes occur and how they impact statistics and reporting.

- Transcript GPA calculation is calculated based on the Units Taken field. This includes both term and cumulative GPA.
- The transcript report reflects the Units Earned field in the *Earned* column. Grade points and GPA are calculated using the *Attempted* column that continues to reflect Units Taken.
- On the Term Statistics page, the *Taken* row represents the Units Taken field on the Student Enrollment 1 page. The *Passed* row represents the new Units Earned field on the Student Enrollment 1 page. Under the *For Progress* column, both *Taken* and *Passed* units are still based on the Progress field on the Student Enrollment 1 page. The *Total* field at the bottom of the *Term Total* column reflect changes made to the *Passed* row and therefore are updated based on changes to the Units Earned field on the Student

Enrollment 1 page. It is important to note that the Units Earned field defaults from the Units Taken field. Therefore, if you do not adjust this field, no change occurs in statistics or reporting.

- Academic load calculations uses the Units Taken field.
- Academic level calculations are now be based on the total Units Earned. Therefore, if the Units Earned field is adjusted, the student's academic level is also adjusted.
- PeopleSoft Academic Advisement uses the Units Earned value to determine if a student has satisfied unit and GPA requirements for graduation on the degree progress audit. When evaluating in progress (not yet graded or flagged as in-progress) coursework, advisement uses the Units Taken value.
- For cumulative GPA condition requirements, PeopleSoft Academic Advisement uses the cumulative GPA from the STDNT_CAR_TERM record. However, for dynamically calculated GPA requirements (those specified on a parameters page as min/max), academic advising uses Units Earned. Therefore, a note is added to the academic advisement report in situations where an adjustment has been made to alert the user that a discrepancy exists between the dynamically calculated GPA on the academic advisement report and the GPA on the transcript report.
- The Units Earned field is included in the academic advisement results analysis database.
- To assist in conversion, the Units Earned field is on the ENRL_REQ_DETAIL record. This allows the enrollment engine to load the STDNT_ENRL table and calculate statistics appropriately.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511

Chapter 27, "Viewing Class Enrollment Data," Viewing Student Statistics, page 598

Chapter 16, "Performing Repeat Checking," page 343

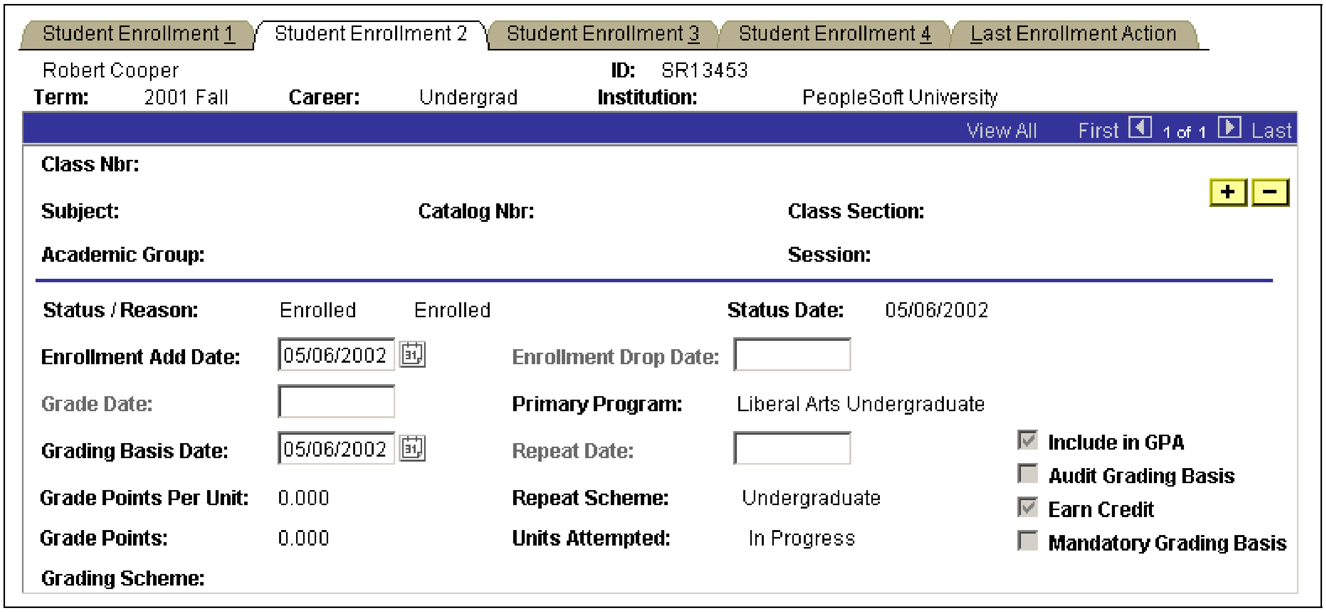
Chapter 33, "Grading Students," page 727

Chapter 4, "Setting Up the Course Catalog," Defining Course Catalog Data, page 67

Chapter 17, "Managing the Schedule of Classes," Adjusting Units, page 384

Viewing Enrollment Transaction Information

Access the Student Enrollment 2 page.



Student Enrollment 2 page

Note. The system bases tuition calculation on the following dates. These dates are critical for initial billing as well as refunds.

Enrollment Add Date
The date that you added the class section to the student's enrollment record.

Enrollment Drop Date
If you have dropped the student from the class section, the system displays the date that you processed the drop.

Grade Date
The date that you graded the student.

Primary Program
The student's primary academic program for the specified career and term combination.

Grading Basis Date
The date that you last changed the grading basis on the Student Enrollment 1 page. If you have not changed the grading basis, the system sets this field to the date that you added the class section to the student's enrollment record. To avoid potential repeat checking problems, this date must always be greater than or equal to the session first date to enroll value. The repeat checking process uses this value to determine which effective-dated grading basis row to use for the student. This value is also available as a PeopleSoft Student Financials fee calculation variable on the Equation Detail page.

Note. The grade posting process does *not* reference this field to determine which grading basis row to use for grading. Instead, the grade posting process uses the term begin date.

Repeat Date
The date that you last changed the repeat code on the Student Enrollment 1 page.

Grade Points Per Unit
The system bases this value on the grade definition that corresponds to the grading basis and grade for this enrollment row. The system sets the value of this field to *0* until the student receives a grade for the class.

Repeat Scheme The repeat scheme for the student's academic career, as defined on the Academic Career Table component. The repeat scheme controls how the system evaluates this course for repeat checking.

Grade Points The system bases this value on the grade definition that corresponds to the grading basis and grade for this enrollment row. The value of this field equals the grade points per unit multiplied by the units taken.

Units Attempted The status of the student's progress in the class. The units attempted value remains *In Progress* until the student receives a grade for the class, in which case the value updates to *Yes.*

Grading Scheme The system displays the value of this field according to the grading scheme of the student's primary academic program for the specified academic career and term, as defined on the Academic Program Table component.

Include in GPA The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.

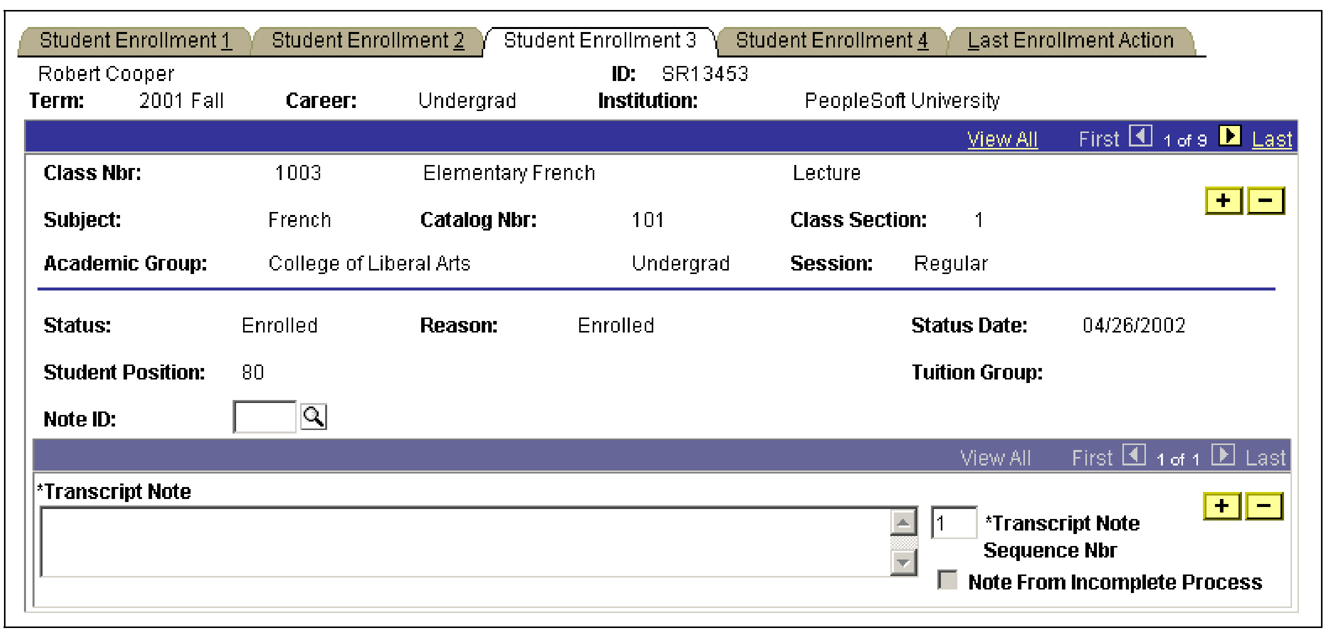
Audit Grading Basis The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.

Earn Credit The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.

Mandatory Grading Basis The system selects this check box if the grading basis for the class is mandatory. The system clears this check box if the grading basis for the class is elective.

Adding Transcript Notes and Text

Access the Student Enrollment 3 page.



Student Enrollment 3 page

Student Position	The student's enrollment position in the class section, which it uses for wait list processing.
Tuition Group	The tuition group to which this class section is tied. A tuition group is the shared characteristics among students. When you register students, the system automatically assigns them to the appropriate tuition groups. When you run the tuition calculation process, it sees that this class section is associated with the tuition group that you specify, and thus charges all students in the tuition group the fees for this class section of the course offering. You can tie all class sections of a course offering to a tuition group on the Course Catalog - Offerings page. You can tie specific class sections of a course offering to a tuition group on the Class Associations page.
Note ID	Select a standard transcript note for the class, if applicable.
Transcript Note	Enter additional free-form text about the specified transcript note. The system prints the text that you enter onto the student's transcript.
Transcript Note Sequence Nbr (transcript note sequence number)	Enter the sequence number of the transcript note. The sequence number indicates the printing order of the transcript notes that you specify.
Note From Incomplete Process	The system automatically selects this check box when the note is added during the incomplete/grade lapse process.

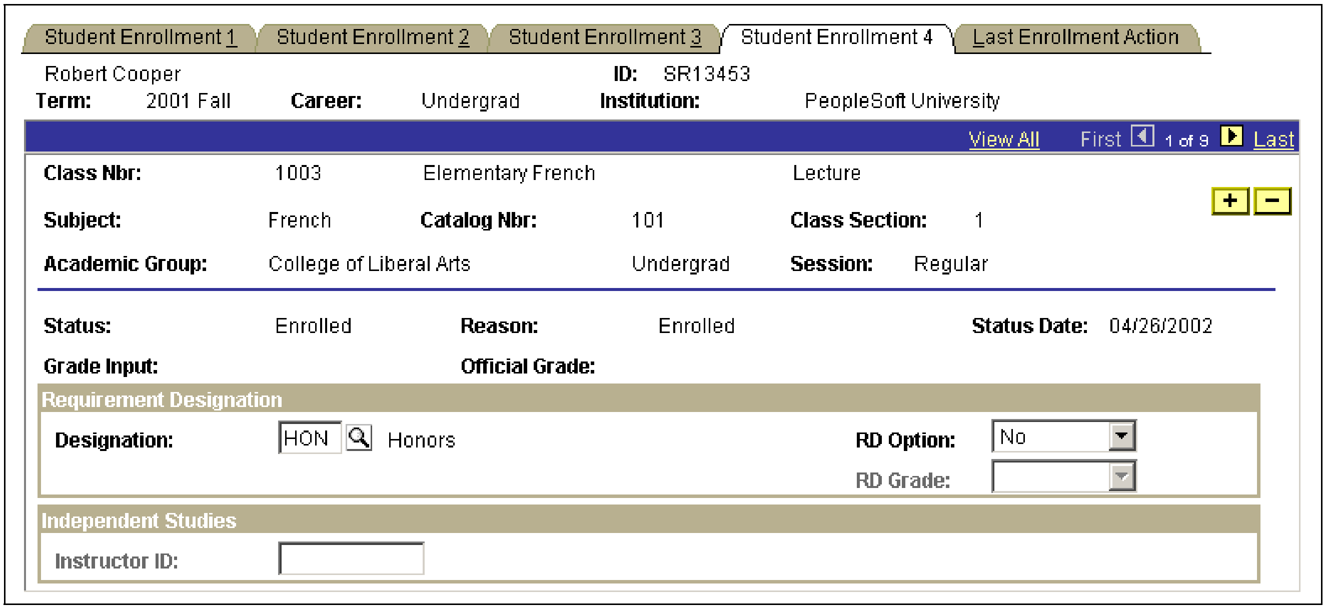
See Also

Chapter 33, "Grading Students," page 727

PeopleSoft 8 SP1 Student Financials PeopleBook, "Calculating Tuition and Fees"

Indicating Requirement Designation Options and Independent Study Instructors

Access the Student Enrollment 4 page.



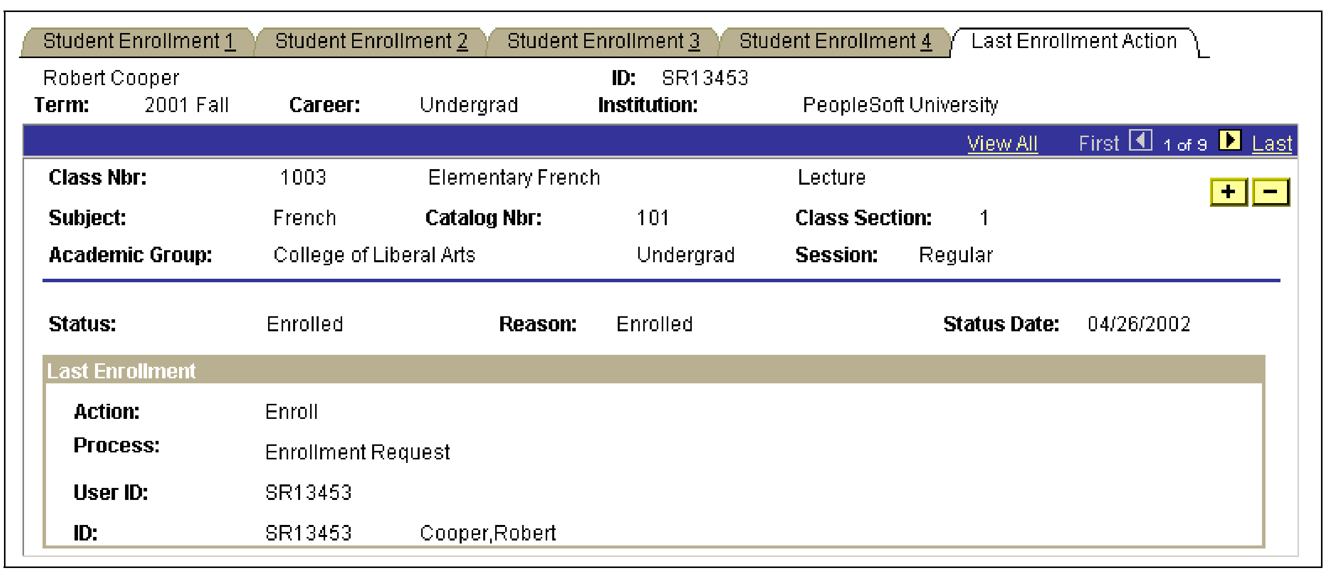
Student Enrollment 4 page

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511

Viewing Last Enrollment Action Information

Access the Last Enrollment Action page.



Last Enrollment Action page

Action The last enrollment action taken for this student through the Enrollment component.

Process The process used for the last enrollment action. The possible values for this field are *Enrollment,* which refers to this page; *Enrollment Request,*

	which refers to the enrollment engine; *Grade Post,* which refers to the grade posting process; and *Class Cancelled.*
User ID	The PeopleSoft user ID of the user who performed the last enrollment action for this class enrollment.
ID	The individual ID of the user who performed the last enrollment action for this class enrollment.

Processing Enrollment Transactions Through the Block Enrollment Feature

This section provides an overview of the Block Enrollment feature and discusses how to:

- Predefine student enrollment blocks.
- Predefine class enrollment blocks.
- Set class enrollment block defaults.
- Merge, retrieve, and post data for block enrollment requests.
- Create custom student enrollment blocks.
- Create custom class enrollment blocks.
- View block enrollment request details.
- Maintain detail for a student's block enrollment request.
- Maintain additional detail for a student's block enrollment request.

Understanding the Block Enrollment Feature

PeopleSoft Student Records provides robust functionality to process groups of enrollment requests at one time. These groups of enrollment requests are known as block enrollment requests. Through the Block Enrollment feature, you can merge a block of students with a block of classes and post these merged blocks as enrollment requests all in one procedure.

This section discusses how to predefine blocks of classes and blocks of students for use in the block enrollment request processing. Later when you process a block enrollment request, you can merge blocks of classes with blocks of students and submit a single enrollment transaction. Because you store predefined blocks in your database when you save them, you can reuse the blocks for any later block enrollment request. This is especially useful in professional schools where all students enroll in the same classes year to year, or in certain undergraduate curricula where multiple classes are clustered as first year corequisites.

If you need to use the block of students or the block of classes only one time *and* you won't be editing the blocks at a later time, then as an alternative you can create custom blocks during processing.

This section also discusses how to process block enrollment requests, which is done through the Block Enrollment component. The Block Enrollment component is the core of the block enrollment functionality. You can merge predefined student blocks with predefined course blocks, create and merge custom blocks of students and custom blocks of classes, or any combination of the two. When you run the Structured Query Report (SQR), process to perform the merge, the process combines the students in the student block with the courses in the course block, thus creating an enrollment request that contains all of the merged records. This enrollment request is keyed by an enrollment request ID.

After merging student blocks with course blocks, you can opt to use the Block Enrollment component to retrieve and review this data before posting the block enrollment request.

When you are ready, you can, with the click of a button, process all of the individual enrollment requests included in the block enrollment request. Alternatively, you can note the enrollment request ID and run the enrollment posting process using the Mass Enrollment page. The button enables you to process block enrollment requests directly through the Block Enrollment component by Remote Call, while the Mass Enrollment component enables you to process block enrollment requests through PeopleSoft Process Scheduler.

After running the posting process, use the Block Enrollment component to review the processing results to see whether each student got enrolled into the requested classes or whether the enrollment engine encountered errors. To correct errors, adjust each affected student's enrollment request or term record as necessary, then post the block enrollment request again—either through the Block Enrollment component or the Mass Enrollment page.

Note. The Block Enrollment feature is *not* intended as a vehicle for converting historical enrollment records, nor should it be used as a vehicle to convert these records.

Pages Used to Process Enrollment Transactions Through the Block Enrollment Feature

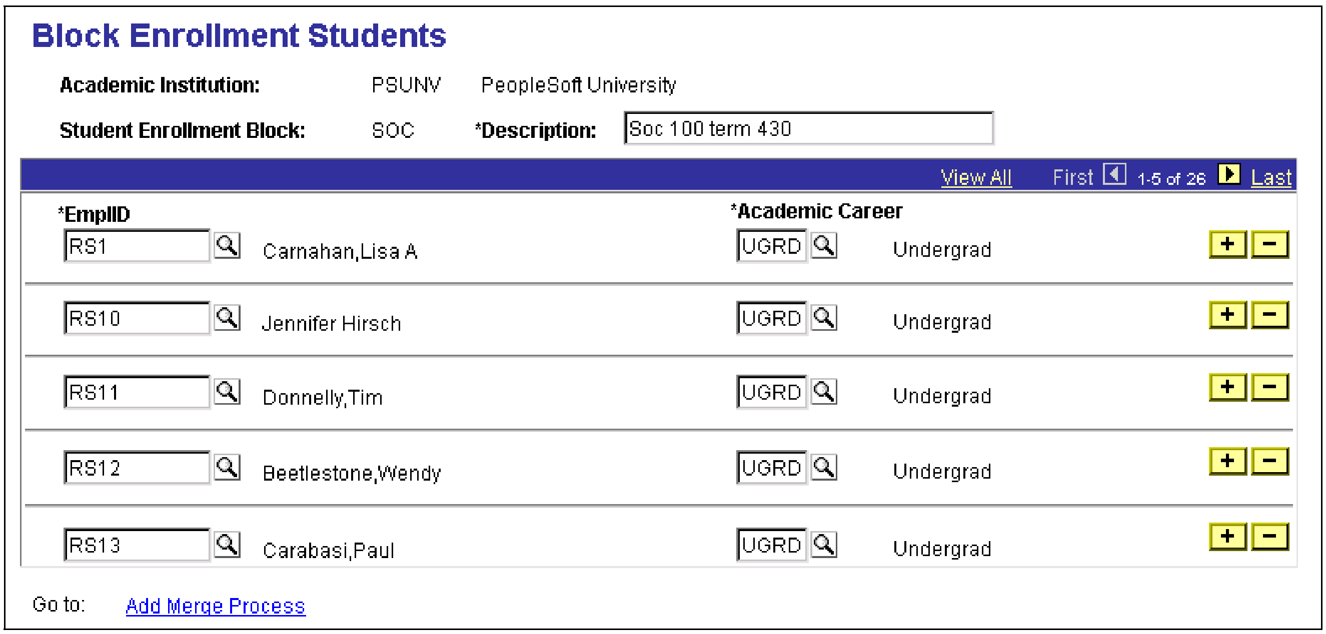
Page Name	Object Name	Navigation	Usage
Block Enrollment Students	STDNT_BLOCK	Manage Student Records, Manage Academic Records, Setup, Block Enrollment Students	Define groups of students for block enrollment purposes. You can then merge blocks of students with blocks of classes by using the Block Enrollment component.
Block Enrollment Classes	CRSE_BLOCK	Manage Student Records, Manage Academic Records, Setup, Block Enrollment Classes, Block Enrollment Classes	Define groups of classes for block enrollment purposes. You can then merge blocks of classes with blocks of students by using the Block Enrollment component.
Course Enrollment Block Default	CRSE_BLOCK_DEFAULT	Manage Student Records, Manage Academic Records, Setup, Block Enrollment Classes, Class Block Defaults link	Set defaults for each class that you add to the course block. You can set up defaults for the enrollment action, action reason, and enrollment overrides. Enrollment security is enforced so that you cannot override anything to which you do not have access.

Page Name	Object Name	Navigation	Usage
Block Enroll Merge	BLOCK_ENROLL_MERGE	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enroll Merge	Create custom student blocks and course blocks, merge predefined or custom student blocks with predefined or custom course blocks, post block enrollment requests, and retrieve data and process results about merged blocks and posted blocks.
Create Custom Student Block	BLK_ENRL_STDNT_SEC	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enroll Merge, Detail / Create link	Create a custom block of students to use for block enrollment. This feature enables you to enroll one or more students into a class or block of classes without having to predefine a student enrollment block on the Block Enrollment Students page, thus simplifying the block enrollment process. You can also use this feature to perform class maintenance where only a few students need changes to their enrollment records.
Create Customized Class Block	BLK_ENRL_CRSE_SEC	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enroll Merge, Detail / Create link	Create a custom block of classes to use for block enrollment. This feature enables you to enroll students into one or more classes without having to predefine a class enrollment block on the Block Enrollment Classes page, thus simplifying the block enrollment process. You can also use this feature to perform class maintenance where only a few students need changes to their enrollment records.
Block Enroll Detail	BLOCK_ENRL_DETAIL	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enroll Detail	View, for a specific block enrollment request, a list of the student and class combinations that have been merged or that have been posted to the students' records. The list appears in grid format with a row for each student and class combination. These student and class combinations are term specific.

Page Name	Object Name	Navigation	Usage
Block Enrl Detail1 (block enroll detail 1)	BLOCK_ENRL_DTL1	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enrl Detail1	Maintain the details of a block enrollment request for a specific student and class.
Block Enrl Detail2 (block enroll detail 2)	BLOCK_ENRL_DTL2	Manage Student Records, Manage Academic Records, Use, Block Enrollment, Block Enrl Detail2	Maintain the details of a block enrollment request for a specific student and class.

Predefining Student Enrollment Blocks

Access the Block Enrollment Students page.



Block Enrollment Students page

Academic Institution The academic institution to which the student enrollment block belongs. Select an academic institution upon entering the page.

Student Enrollment Block Enter a description of the student enrollment block code.

ID Select the identification code of the student you want to include in the group. The system prompts you with IDs from the STDNT_ID_SRCH table.

Academic Career Select the student's academic careers that you want to include in the block. The system prompts you with valid values from the STDNT_CAREER table. This field is required whenever you select an ID.

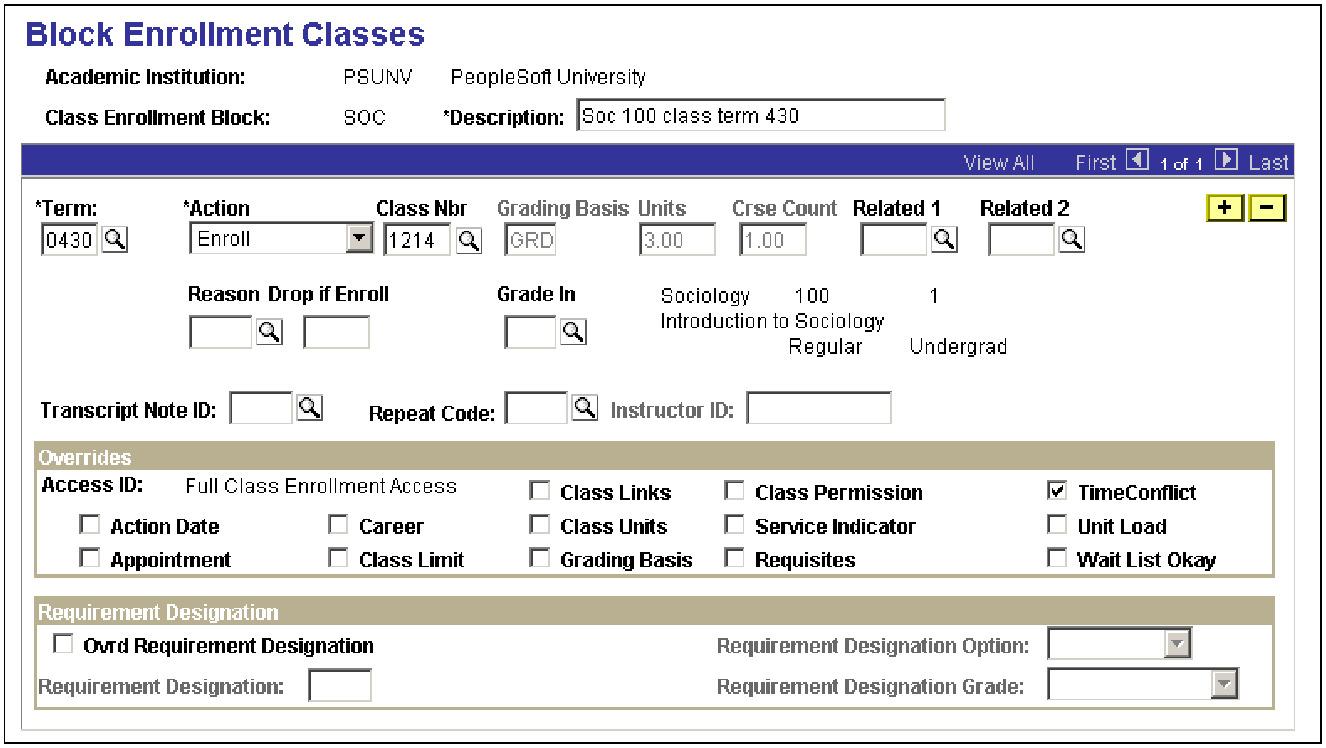
Add Merge Process Click to access the Block Enrollment component, where you can process block enrollment requests.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Block Enrollment Feature, page 533

Predefining Class Enrollment Blocks

Access the Block Enrollment Classes page.



Block Enrollment Classes page

Academic Institution The academic institution to which the class enrollment block belongs. Select an academic institution upon entering the page.

Class Enrollment Block Enter a description of the class enrollment block code.

Class Block Defaults Click to access the Class Block Defaults page, where you can set default values for security access overrides of enrollment functions. The overrides that you set on this page are used for each new class enrollment block detail that you enter.

Term Select the term for which you want to enroll students in a specific class. Later on this page you specify the specific class in theClass Nbr field. You can add classes from multiple terms to the enrollment course block. Define terms on the Term Table page.

Add Merge Process Click to access the Block Enrollment component, where you can process block enrollment requests.

Overrides

This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

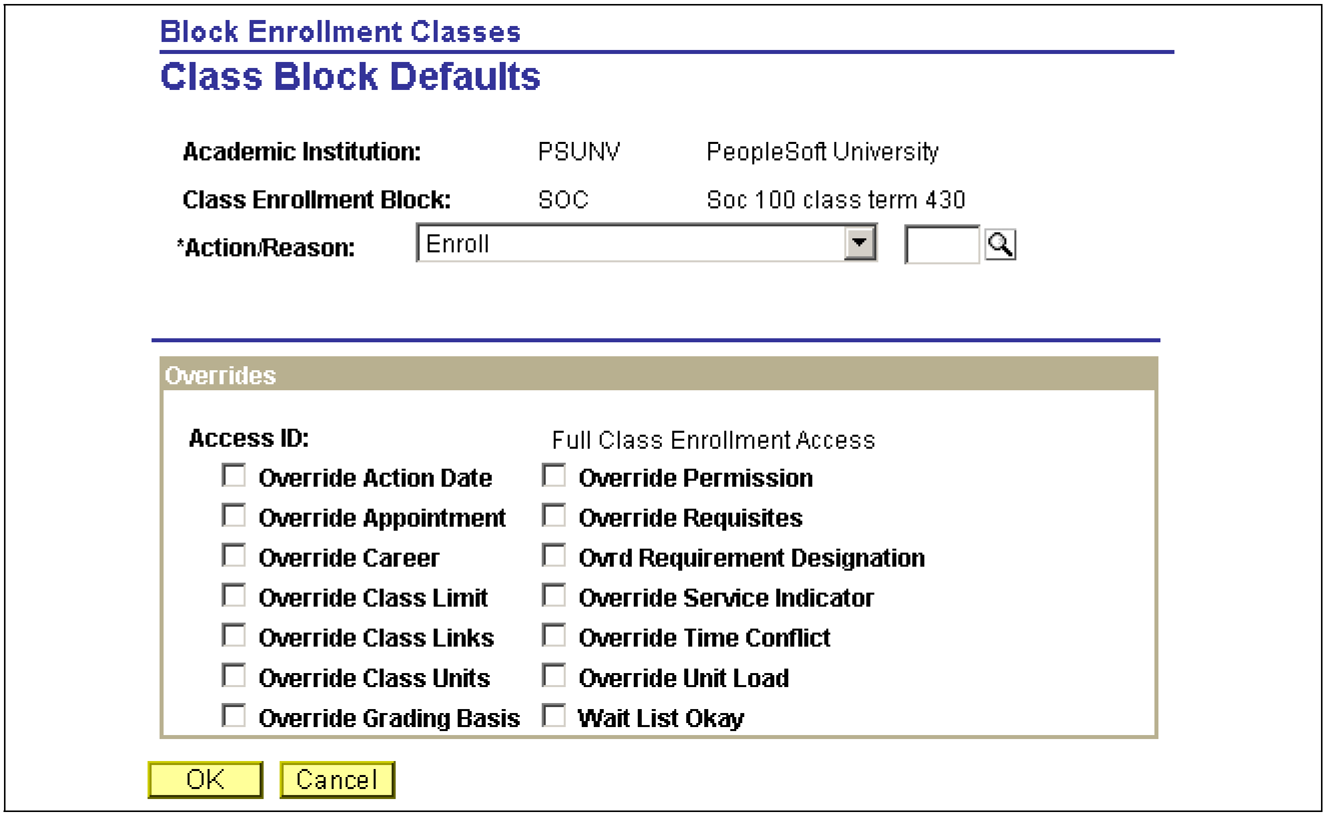
See Also

Chapter 24, "Processing Class Enrollment Transactions," Setting Class Enrollment Block Defaults, page 538

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511

Setting Class Enrollment Block Defaults

Access the Course Enrollment Block Default page.



Class Block Defaults page

Action Select a value for this field to set the default enrollment action for the class enrollment block. The system by default sets the enrollment action to *Enroll,* but you can change this default value.

Reason Select the reason for the enrollment action, such as whether the students are adding or dropping classes in this class enrollment block.

Overrides

This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

Access ID The system displays the access ID, which describes the amount of enrollment access you have.

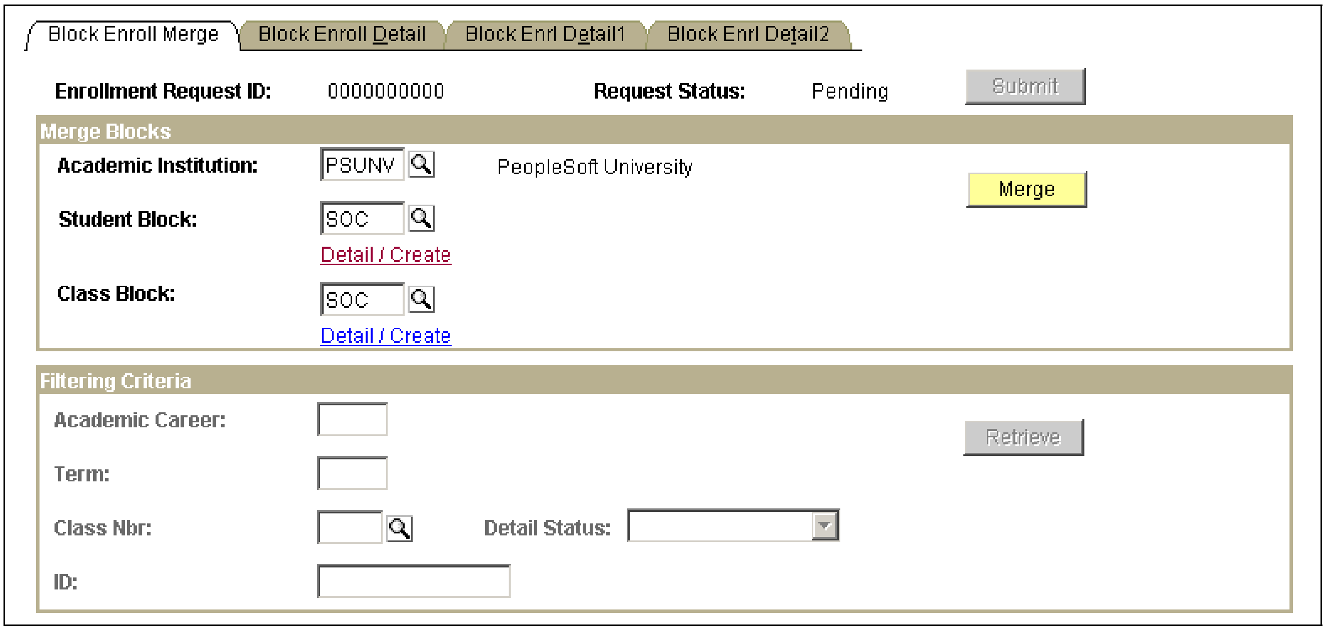
OK Click to return to the Block Enrollment Classes page.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Securing Student Records”

Merging, Retrieving, and Posting Data for Block Enrollment Requests

Access the Block Enroll Merge page.



Block Enroll Merge page

With block enrollment, you can use any combination of custom student blocks and class blocks with predefined blocks. For example, you might have a predefined course block for first year law students that you want to merge with some late admits to the law school. Instead of predefining a student block for the new students, you might choose to merge the predefined course block for first year law students with a custom student block.

General Fields

Enrollment Request ID The system displays the identification number for the block enrollment request. As soon as you merge the student enrollment block with the class enrollment block, the system generates an enrollment request ID that is unique to the block enrollment request. The same number is assigned to each student and class combination in the block enrollment request.

Request Status The status of the block enrollment request:

Errors: The enrollment engine was unable to post the submitted enrollment request due to errors.

Pending: The request is pending submission for enrollment processing.

Success: The enrollment engine successfully posted the request.

Merging Student and Class Enrollment Blocks

Academic Institution Select the academic institution for which you want to process this block enrollment request.

Student Block Select a predefined student enrollment block, or leave this field blank and click the Detail / Create link beneath the field to define a custom student enrollment block.

Important! If you create a custom student enrollment block, the system does not store the block for future retrieval.

Detail / Create Click this link beneath the Student Block field either to view the detail for the student enrollment block that you have selected, or to define a custom student enrollment block.

To view the detail for a predefined student enrollment block, select a value for the Student Block field and then click this link. The system launches a new application window to display the Student Enrollment Block page. Edit the student block as necessary.

To define a custom student enrollment block, leave the Student Block field blank and click this button. The system displays the Create Custom Student Block page, where you can define the students that you want to include in the student enrollment block.

Class Block Select a predefined class enrollment block, or leave this field blank and click the Detail / Create link beneath the field to define a custom class enrollment block.

Important! If you create a custom class enrollment block, the system does not store the block for future retrieval.

Detail / Create Click this link beneath the Class Block field either to view the detail for the class enrollment block that you have selected, or to define a custom class enrollment block.

To view the detail for a predefined class enrollment block, select a value for the Class Block field, then click this link. The system launches a new application window to display the Class Enrollment Block page. Edit the class block as necessary.

To define a custom class enrollment block, leave the Class Block field blank and click this button. The system displays the Create Customized Class Block page, where you can define the classes that you want to include in the class enrollment block.

Merge Click to run the SQR process that merges the student block with the class block. Your process request is scheduled in PeopleSoft Process Scheduler. You can view the status of your merge using the process monitor. Once the process completes the merge, the merge process updates the enrollment status of the block enrollment request to *pending* and the fields in the Merge Blocks group box become available for entry. You are now ready to retrieve and review the results of the merge process (optional) and post your block enrollment request, all of which can be done using the Block Enrollment component.

Note. The merge process combines student blocks with course blocks for all students in the student block, regardless whether a student activated in the term to which the class belongs. If, when you post the block enrollment request, the enrollment engine encounters a student not activated in the term to which the class belongs, it cancels processing of that student's enrollment request and logs an error message. You can retrieve and view the error message through the Block Enrollment component.

Retrieving Data for Merged Blocks or Posted Block Enrollment Requests

Use the fields in the Filtering Criteria group box to retrieve the results of the merging process or the posting process. To narrow your search, enter specific filtering criteria.

Academic Career

Select the academic career for which you want to retrieve detail for this block enrollment request. If you want to search for detail in all academic careers, leave this field blank.

Term

Select the term for which you want to retrieve detail for this block enrollment request. If you want to search for detail in all terms, leave this field blank.

Note. If your filtering criteria include a term, you must enter an academic career value prior to selecting a term.

Class Nbr (class number)

If you want to retrieve detail for a specific class within this block enrollment request, select the class. Otherwise, leave this field blank to retrieve all classes within this block enrollment request.

Note. If your filtering criteria include a class number, you must enter the valid academic career and term prior to entering or searching for the class number.

Click the Enter Search Criteria button to access the Basic Class Search page, where you can search the schedule of classes for the class that you want to retrieve.

Detail Status

Select from the following choices the status of the block enrollment request for which you want to retrieve detail lines.

None: The system retrieves all detail lines within this block enrollment request.

Errors: The system retrieves all detail lines within this block enrollment request that the system was unable to post due to errors.

Pending: The system retrieves all detail lines within this block enrollment request that are pending submission for enrollment processing.

Success: The system retrieves all detail lines within this block enrollment request that the enrollment engine has successfully posted.

ID If you want to retrieve detail lines within this block enrollment request for a specific student, enter the student's ID.

Retrieve Click to retrieve the results of the merging process or the posting process that match your filtering criteria. The system displays the Block Enroll Detail page, where you can view the results of your selection. If you want to view all detail lines within this block enrollment request, click this button without entering any filtering criteria. To narrow your search, enter values for any of the filtering criteria on the Block Merge Enroll page. For example, if you want to view only the errors found during the posting process, select in the Detail Status field the *Errors* value, then click this button.

Note. While you can view several thousand rows of merged data through the Block Enrollment component, it is possible to merge more data than the component can display. If you have merged more than several thousand rows of data, PeopleSoft recommends that you specify some filtering criteria before clicking the Retrieve button.

Posting Block Enrollment Requests

Submit Click to process the block enrollment request for all detail lines within this block enrollment request. The enrollment engine posts all successful class enrollment requests to the appropriate student's enrollment record. Whenever you post a block enrollment request a subsequent time, the enrollment engine processes all requests within a block enrollment request that are not yet posted. The enrollment engine does *not* process detail lines within the block enrollment request that have already posted successfully.

If you want to post the block enrollment request later, you can set up PeopleSoft Process Scheduler to run the posting process automatically, or you can use the Mass Enrollment page to post the block enrollment request. To successfully complete a block enrollment request, however, you first must merge the student enrollment block with the class enrollment block on the Block Enroll Merge page.

If any entry in the block enrollment request fails to post to the student's enrollment record, the entire block enrollment request has an error status because all requests within the block are tied to the same enrollment request ID. This, however, does *not* mean that everything was in error. Some detail lines within the block enrollment request might be successful, while some others have errors.

To correct errors, adjust each affected student's detail line of the block enrollment request or term record as necessary, then post the block enrollment request again.

Note. The posting process can handle as much data as you want to send to it. However, if the posting process takes too long to complete, you might get a remote call time-out error that prevents the process from completing successfully. The remote call time-out error depends on your time-out settings and the size of the batch you are posting. A system administrator can increase the time-out setting on the Remote Call tab of PeopleSoft Configuration Manager. Alternatively, if the block enrollment request is too large, you can note the enrollment request ID and use the Mass Enrollment page to post the block enrollment request. The Mass Enrollment page uses PeopleSoft Process Scheduler and is therefore not subject to remote call time-out errors.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Predefining Student Enrollment Blocks, page 536

Chapter 24, "Processing Class Enrollment Transactions," Predefining Class Enrollment Blocks, page 537

Chapter 24, "Processing Class Enrollment Transactions," Creating Custom Student Enrollment Blocks, page 543

Chapter 24, "Processing Class Enrollment Transactions," Predefining Class Enrollment Blocks, page 537

Chapter 24, "Processing Class Enrollment Transactions," Posting Mass Enrollment Requests, page 553

Chapter 17, "Managing the Schedule of Classes," Searching for Classes, page 410

Using PeopleSoft Applications PeopleBook

PeopleSoft PeopleTools PeopleBook

Creating Custom Student Enrollment Blocks

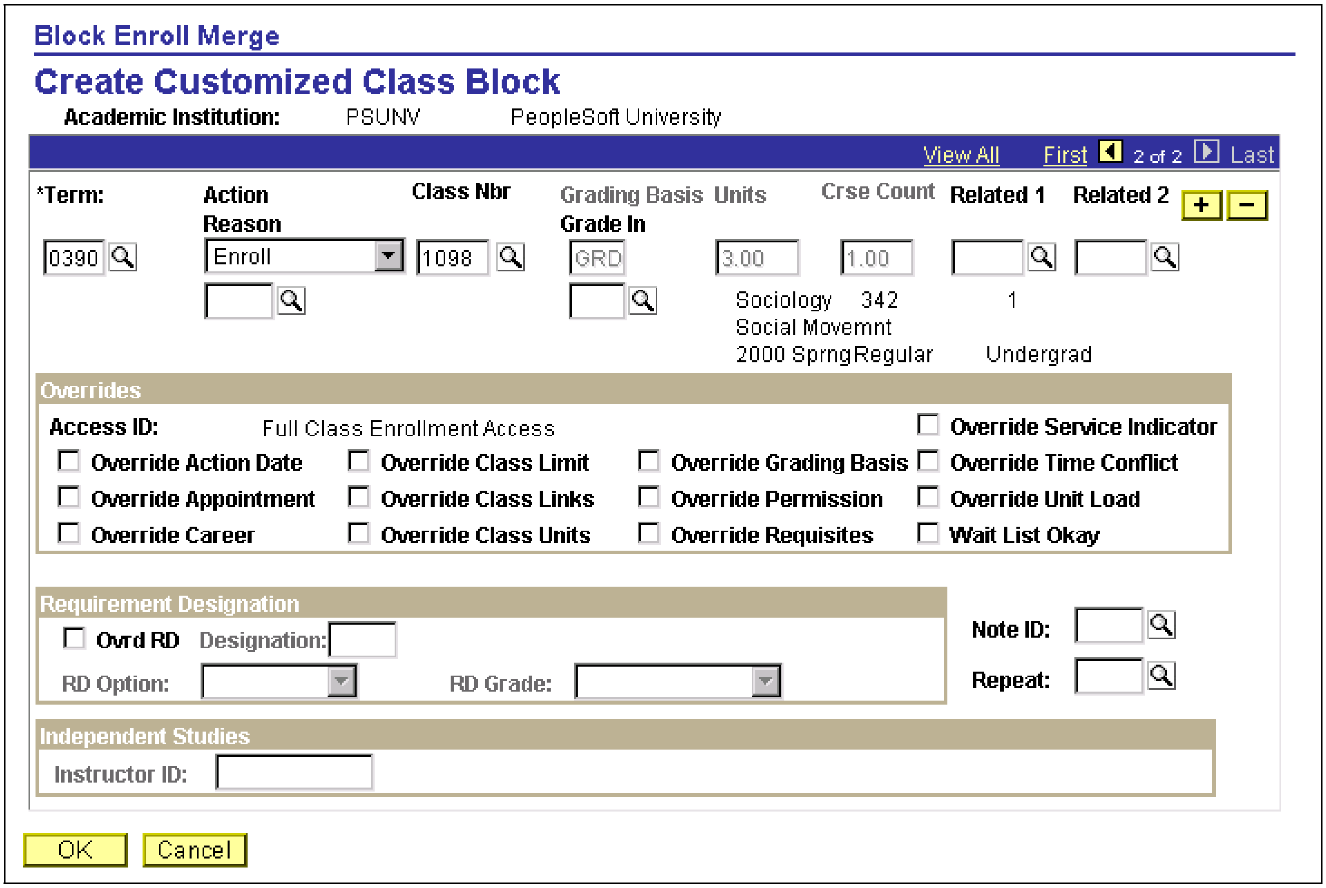
Access the Create Custom Student Block page.

Note. When you create a custom student enrollment block, the list of students that you enter is valid only for one-time merging of students into classes. Once you run the merging process, you cannot retrieve the custom student enrollment block that you have created. Also, make sure that you have a finalized list of students before you create a custom student enrollment block because the only way to save your list once you enter it into the page is to run the merging process.

ID	Select the identification code of the student you want to include in the custom student enrollment block. The system prompts you with IDs from the STDNT_ID_SRCH table.
Academic Career	Select the student's academic careers that you want to include in the block. The system prompts you with valid values from the STDNT_CAREER table. This field is required whenever you select an ID.
OK	When you have entered all of the students and their academic careers for this custom student enrollment block, click this button to return to the Block Enroll Merge page.

Creating Custom Class Enrollment Blocks

Access the Create Customized Class Block page.



Create Customized Class Block page

Note. When you create a custom class enrollment block, the list of classes that you enter is valid for only one-time merging of students into classes. Once you run the merging process, you cannot retrieve the custom class enrollment block that you have created. Also, make sure that you have a finalized list of classes before you create a custom class enrollment block because the only way to save your list once you enter it into the page is to run the merging process.

Term

Select the term for which you want to enroll students in a specific class. Later on this page, you'll specify the specific class in the Class Nbr field. You can add classes from multiple terms to the enrollment course block.

Overrides

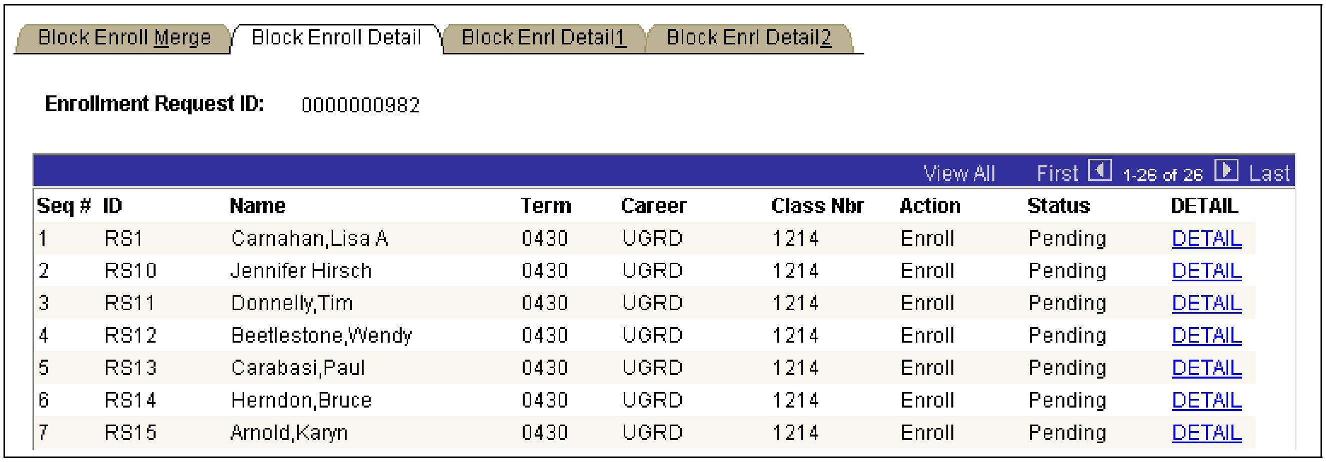
This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

OK

Enter the appropriate class data that you want to include in the custom class enrollment block, adding a new row for each class. Then click this button to return you to the Block Enroll Merge page.

Viewing Block Enrollment Request Details

Access the Block Enroll Detail page.



Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Enrollment Request ID: 0000000982

View All First 1-26 of 26 Last

Seq #	ID	Name	Term	Career	Class Nbr	Action	Status	DETAIL
1	RS1	Carnahan,Lisa A	0430	UGRD	1214	Enroll	Pending	DETAIL
2	RS10	Jennifer Hirsch	0430	UGRD	1214	Enroll	Pending	DETAIL
3	RS11	Donnelly,Tim	0430	UGRD	1214	Enroll	Pending	DETAIL
4	RS12	Beetlestone,Wendy	0430	UGRD	1214	Enroll	Pending	DETAIL
5	RS13	Carabasi,Paul	0430	UGRD	1214	Enroll	Pending	DETAIL
6	RS14	Herndon,Bruce	0430	UGRD	1214	Enroll	Pending	DETAIL
7	RS15	Arnold,Karyn	0430	UGRD	1214	Enroll	Pending	DETAIL

Block Enroll Detail page

If the enrollment engine posting process encounters errors and cannot post the student's enrollment request, you can drill down to the enrollment request detail for any student and class combination found on the list to view the errors. Change the individual's enrollment request or career term record, then post the block enrollment request again.

Enrollment Request ID	The system displays the identification number for the block enrollment request. As soon as you merge the student enrollment block with the class enrollment block, the system generates an enrollment request ID that is unique to the block enrollment request. The same number is assigned to each student and class combination in the block enrollment request. View an individual student's request within a block enrollment request through this component, or use this enrollment request ID to view an individual student request through the Enrollment Request and Quick Enroll components.
Seq # (sequence number)	Indicates the sequence in which the student and class combination resides in the block enrollment request. It is for internal processing purposes only.
ID	The identification number of the student to which this detail line of the block enrollment request relates.
Name	The name of the student to which this detail line of the block enrollment request relates.
Term	The term in which this detail line of the block enrollment request relates. A block enrollment request can have student and class combinations in multiple terms for the same student.
Career	The academic career to which this detail line of the block enrollment request relates.
Class Nbr (class number)	The specific class in which this detail line of the block enrollment request relates. Each class requested for a student appears on its own detail line.
Action	The enrollment action for the student's requested class.
Status	The enrollment status for the student's requested class.

Detail

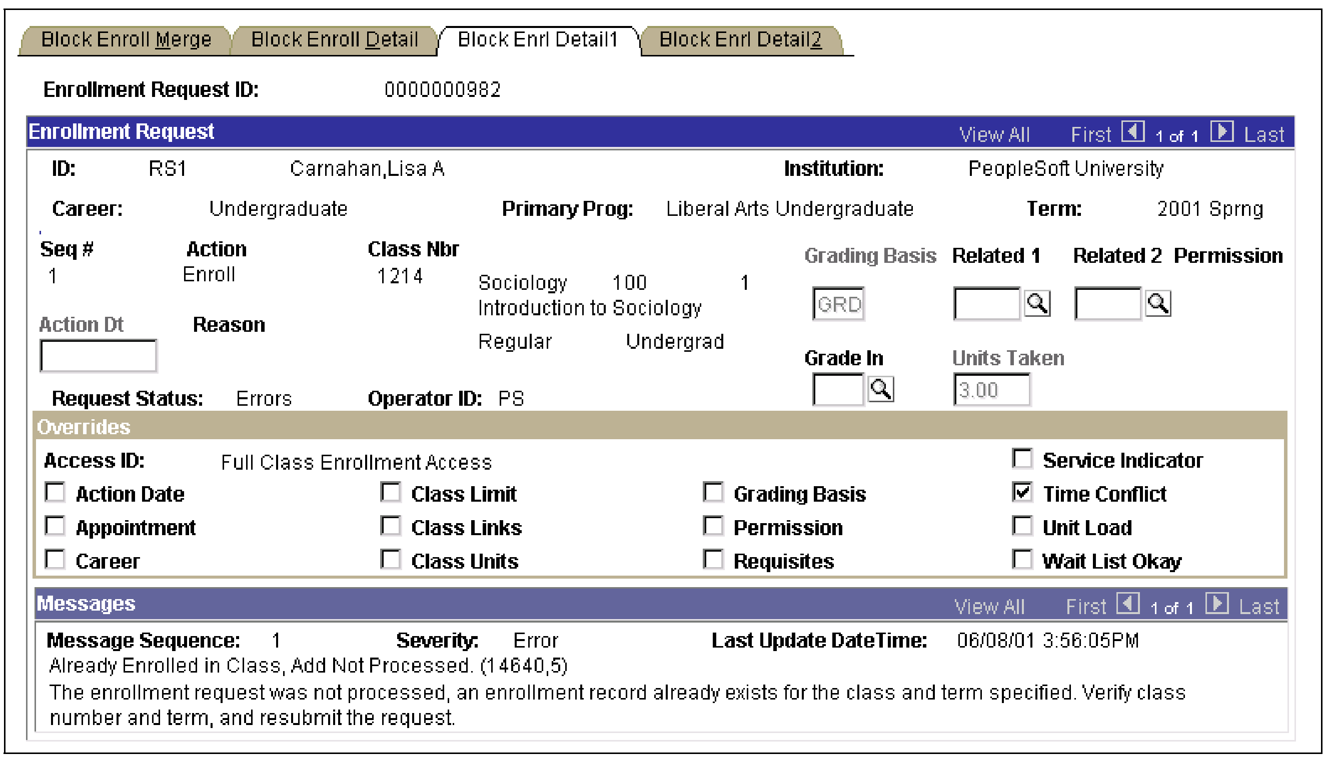
After you merge a student enrollment block with a course enrollment block, click this button for a specific student and class combination to view and edit the details of that detail line of the block enrollment request. The system populates the Block Enrl Detail1 and Block Enrl Detail2 pages, then displays the Block Enrl Detail1 page for you to view the information.

After you post the block enrollment request, you can click this button for a specific student and class combination to review the detail results of the enrollment posting process. If the detail line of the block enrollment request successfully posted to the student's record, you can view the details on the Block Enrl Detail1 and Block Enrl Detail2 pages (they are unavailable for edit). If the enrollment posting process encounters errors for any of the detail lines of the block enrollment request, you can view the message text about the errors, change the affected student's enrollment request or career term record as necessary, and then go to the Block Enroll Merge page and post the block enrollment request again.

Note. If you encounter errors for multiple students in the block enrollment request and you want to override these errors, you must save the overrides for each student and class combination before proceeding to the next error.

Maintaining Detail for a Student's Block Enrollment Request

Access the Block Enrl Detail1 page.

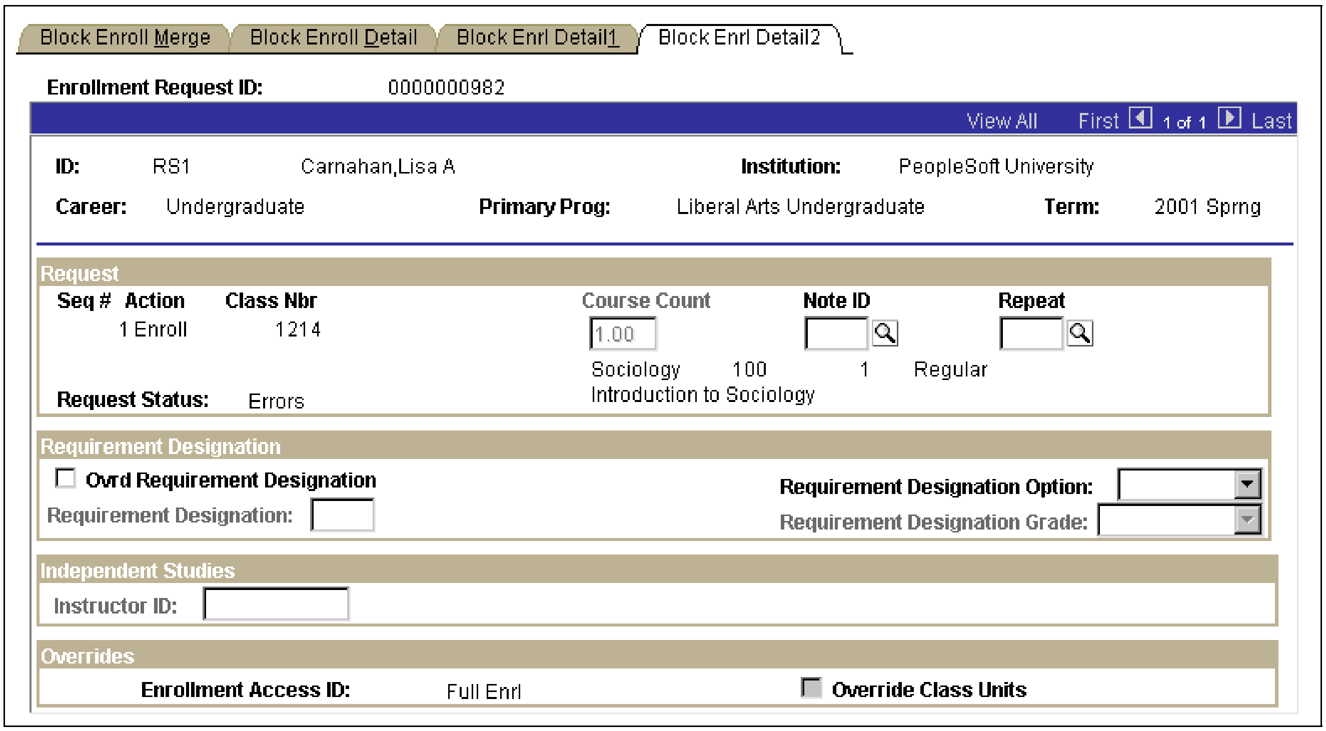


Block Enrl Detail1 page

Important! After you merge the student and class enrollment blocks but before you post the block enrollment request, you can use this page to edit each individual student's enrollment request. However, you *must* save your changes for *each* student and class combination of the block enrollment request prior to posting to have the changes included in the posting process.

Maintaining Additional Detail for a Student's Block Enrollment Request

Access the Block Enrl Detail2 page.



Block Enrl Detail2 page

Processing Enrollment Transactions Through the Enrollment Request Component

The Enrollment Request component has the exact same functionality as the Quick Enroll component. Transactions that you process through the Enrollment Request component can also be accessed through the Quick Enroll component and vice versa. You'll use the Enrollment Request component most often to enter enrollment information on a student-by-student basis either through an Interactive Voice Response (IVR) interface or through the pages themselves. You generate enrollment requests, which you can post in the page or in a background process. The enrollment engine posting process validates the requests against all of the rules that you have created, such as rules for requisites and requirements. Depending on how you set up your enrollment security, you might be permitted to override just certain aspects of your enrollment rules, such as class limits or prerequisites.

Enrollment security plays an important role in defining who has access to add class enrollments to a student's enrollment record. Use the Update/Display mode to post unsuccessful enrollment requests or to view the enrollment request data.

This section discusses how to add or update student enrollment request transactions.

See Also

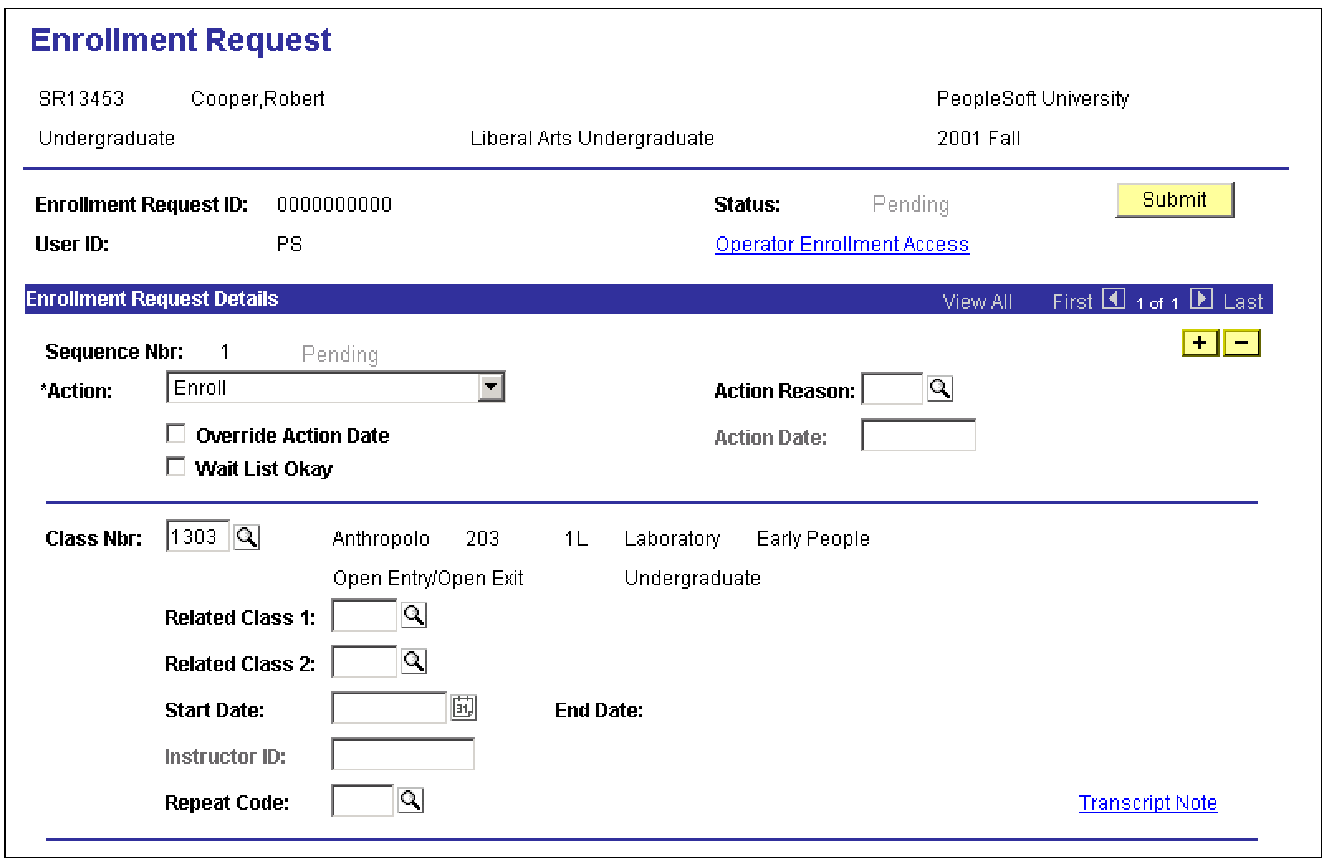
PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Student Records"

Page Used to Process Enrollment Transactions Through the Enrollment Request Component

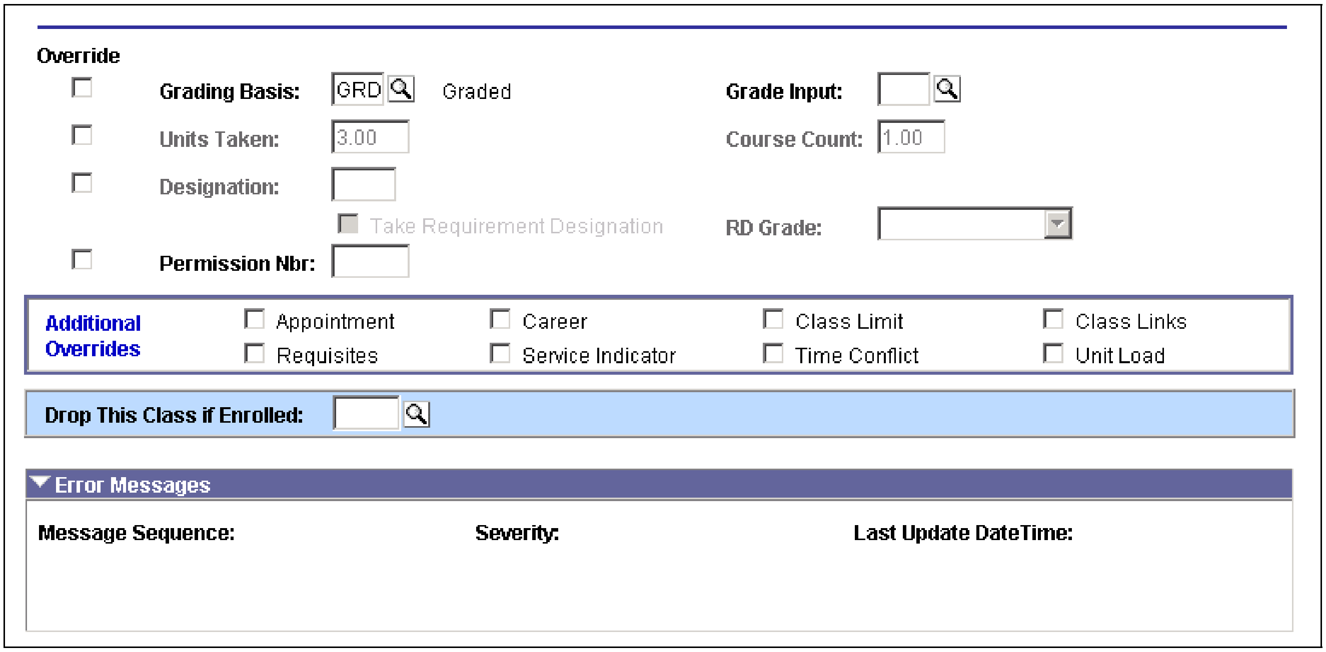
Page Name	Object Name	Navigation	Usage
Enrollment Request	ENRL_REQUEST	Manage Student Records, Manage Academic Records, Use, Enrollment Request	Add or update enrollment request transactions for students.

Adding or Updating Student Enrollment Request Transactions

Access the Enrollment Request page.



Enrollment Request page (1 of 2)



Enrollment Request page (2 of 2)

User ID — The system displays the identification code of the user who created the enrollment request, providing you with a visible audit trail of the changes made to enrollment requests.

Sequence Nbr (sequence number) — The system sets the sequence number to *1* and increases it by one for each class section added to the enrollment request. The number specifies the order in which the enrollment engine processes rows within the request.

Message Sequence — The posting process displays a sequence number for each message that it writes to the message log for the corresponding request.

Severity — The posting process displays the severity of each message that it writes to the message log for the corresponding request. For example, if the posting process is unable to post a request due to errors, it displays a severity value of *Error.*

Last Update Date Time — The posting process displays the last date and time that it updated the message log for the corresponding request.

Message Text (unlabeled) — The posting process displays the message text and a detailed explanation of each message that it writes to the message log for the corresponding request. You can view and update messages in the Message Catalog within the appropriate message set.

Important! The remaining page elements are described in context of the Quick Enrollment page.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 511

Chapter 24, "Processing Class Enrollment Transactions," Viewing Security Access to Enrollment Functions, page 554

Chapter 26, "Using Enrollment Related Processes," Managing Wait Lists, page 580

Chapter 23, "Managing Enrollment Appointments," Assigning and Maintaining Enrollment Appointments for Individual Students, page 502

Chapter 27, "Viewing Class Enrollment Data," Viewing Student Study Lists, page 600

Chapter 27, "Viewing Class Enrollment Data," Viewing Term Statistics for Multiple Terms, page 600

Processing Self-Service Enrollment Transactions

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section discusses how to:

- Select terms for enrollment requests.
- View class schedules for a term.
- View class details.
- View class deadlines.
- View class meeting details.
- Request enrollment into additional classes.
- Complete class enrollment requests.
- View enrollment engine messages related to enrollment requests.
- Perform enrollment actions.
- Request class swaps.
- View class schedules for a week, as of a specific date.

Understanding Self-Service Enrollment Transaction Processing

Students can use the Enroll in a Class self-service pages to add classes, drop classes, or swap classes for a term. While students perform their enrollment transaction, they can search the schedule of classes for the class they want, seeing beforehand whether the class is open for enrollment. After students submit their enrollment request, the system lets them know whether they have successfully completed the transaction. If so, students can view their revised class schedule. If not, students can view the reason for the enrollment error. For example, perhaps the student is trying to add a class and has not yet taken the course prerequisites.

When you access the Enrollment - Select Enrollment Term page, the system displays the terms in which students are active, provided that you have selected to show the term in self-service. Select to show a term in self-service on the Term Table page of the Term/Session Table component. Students select the term within the academic career and institution for which they want to submit an enrollment request. The system displays the Enrollment - View My Class Schedule page, which shows the class schedule for the selection and provides links to enrollment processing functionality. In addition, students can use the Weekly Schedule page to review their schedule for a particular week within a term, as of a date they specify.

Pages Used to Process Enrollment Transactions Through Self-Service

Page Name	Object Name	Navigation	Usage
Enrollment - Select Enrollment Term	SS_ENRL_REQ_TERMS	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to select the term for which they want to submit an enrollment request or view enrollment appointments.
View My Class Schedule or Student Study List	SS_ES_STUDY_LIST	• SA Self Service, Learner Services, Academics, Enroll in a Class • SA Self Service, Learner Services, Academics, View My Class Schedule • SA Self Service, Learning Management, New/Drop-In Advisees	Students can use this page (shown as View My Class Schedule) to view their class schedules for a term. If the student accesses the page through the Enroll in a Class menu item, the student can select to add, drop, swap, or change classes enrollments. Advisors can use this page (shown as Student Study List) to view an advisee's class schedule for a term.
Class Details	SS_CLASS_NTLR	Click the Class Details button on the Enrollment - View My Class Schedule page in PeopleSoft Learner Services. Or, click the Class Details button on the Student Study List page of PeopleSoft Student Records. Or, click the Class Details button on the Student Study List page in PeopleSoft Learning Management.	View details about a class on one's class schedule, including notes about the class.

Page Name	Object Name	Navigation	Usage
View My Schedule - Academic Calendar	ACAD_CAL_DATES	Click the Academic Calendar button on the Enrollment - View My Class schedule page in PeopleSoft Learner Services collaborative application. Or, click the Academic Calendar button on the Student Study List page of PeopleSoft Student Records. Or, click the Academic Calendar button on the Student Study List page in PeopleSoft Learning Management collaborative application.	View drop, cancel, and withdrawal deadlines for a class on one's class schedule, and the definition of each deadline.
Class Meeting Details	SS_CLASS_MTG_DTL	Click the Meeting Info link on the Enrollment - View My Class schedule page in PeopleSoft Learner Services collaborative application. Or, click the Meeting Info link on the Student Study List page of PeopleSoft Student Records. Or, click the Meeting Info link on the Student Study List page in PeopleSoft Learning Management collaborative application.	View details about a class meeting on one's class schedule.
Enrollment - Add Classes	SS_ENRL_REQ_ADD	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to request enrollment into additional classes for a term.
Class Enrollment Options	SS_ENRL_REQ_ADDDTL	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to complete the information for their class enrollment requests.
Enrollment - Enrollment Request Messages	ENRLREQ_MSGLOG_SBP	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to view enrollment engine messages related to their enrollment request.
Enrollment - Drop/Update Classes	SS_ENRL_REQ_UPD	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to perform an enrollment action of update, drop, or drop to wait list for their class enrollments in a term.
Enrollment - Swap Classes	SS_ENRL_REQ_SWAP	SA Self Service, Learner Services, Academics, Enroll in a Class	Students can use this page to request to swap an existing class enrollment within a term for a different class enrollment.

Page Name	Object Name	Navigation	Usage
Weekly Schedule	SS_WEEKLY_SCHEDULE	• SA Self Service, Learner Services, Academics, View My Weekly Schedule, Weekly Schedule • SA Self Service, Learner Services, Home, Learner Services, Academics, View My Weekly Schedule, Weekly Schedule	View the student weekly schedule. **Note.** Before you can view the student weekly schedule, you must define time periods. See Chapter 17, "Managing the Schedule of Classes," Setting Up Weekly Schedule Time Periods, page 406.

Posting Mass Enrollment Requests

This section discusses how to post enrollment requests in mass.

Page Used to Post Mass Enrollment Requests

Page Name	Object Name	Navigation	Usage
Mass Enrollment	RUNCTL_SRPCEMSS	Manage Student Records, Manage Academic Records, Process, Mass Enrollment	Post a group of enrollment requests. Although enrollment processing is designed for you to generate and post requests online, PeopleSoft also provides this batch posting process as a means to speed data entry for registration officials who want to post large groups of enrollments at once rather than having to wait for the enrollment engine to post each request at the time it is made.

Posting Enrollment Requests in Mass

Access the Mass Enrollment page.

You can also use the Mass Enrollment page to post block enrollment requests, especially larger requests that might be subject to a remote call time-out error if you were to click the Post button on the Block Enroll Merge page. Because the mass enrollment process uses PeopleSoft Process Scheduler to post enrollment requests, you avoid possible remote call time-out errors.

Run the Mass Enrollment COBOL/SQL process (SRPCEMSS) as needed. All the rules checking (requisites, permissions, repeat checking, and so on) still occur.

Note. PeopleSoft strongly recommends that the you use the Mass Enrollment page and its corresponding process for converting historical enrollment records.

From Enrollment Request ID and **To Enrollment Request ID**

Enter the start enrollment request ID in the From Enrollment Request ID field, and enter the last enrollment request ID to post in the To Enrollment Request ID field. Enrollment request ID values are generated by the system when you enter student enrollment requests. If you are entering only one enrollment request ID, such as for posting a single block enrollment request, enter the value in the From Enrollment Request ID field.

Adding Transcript Notes to Enrollment Requests

This section discusses how to add and update transcript notes to enrollment requests.

Page Used to Add Transcript Notes to Enrollment Requests

Page Name	Object Name	Navigation	Usage
Transcript Note	ENRL_REQ_NOTE	Click the Transcript Note link on the Enrollment Request page or the Create Transcript Note link on the Quick Enrollment page.	Add and update transcript notes on an enrollment request.

Adding and Updating Enrollment Request Transcript Notes

Access the Transcript Note page.

Transcript Note ID

Select a standard transcript note for the class, if applicable.

Transcript Note

Enter additional free-form text about the specified transcript note. The system prints the text you enter onto the student's transcript.

Tscrpt Note Nbr (transcript note number)

Enter the sequence number of the transcript note. The sequence number indicates the printing order of the transcript notes that you specify.

Viewing Security Access to Enrollment Functions

This section discusses how to view your security access to enrollment functions.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Securing Student Records"

Page Used to View Security Access to Enrollment Functions

Page Name	Object Name	Navigation	Usage
Access to Enrollment Functions	ENRL_REQ_ACCESS	Click the Operator Enrollment Access link on the Enrollment Request page or the View Enrollment Access link on the Quick Enrollment page.	View your security access to enrollment functions.

Viewing Enrollment Request Messages

This section discusses how to view the enrollment request message log.

Page Used to View Enrollment Request Messages

Page Name	Object Name	Navigation	Usage
Enrollment Message Log	ENRLREQ_MSGLOG_SBP	Click the Errors link or Messages link in the Status field on the Quick Enrollment page.	View error message text for a specific row in the enrollment request.

Inquiring on Enrollment Request Messages

Access the Enrollment Message Log page.

Message Severity The posting process displays the severity of each message that it writes to the message log for the corresponding request. For example, if the posting process is unable to post a request due to errors, it displays a severity value of *Error.*

Message Text The posting process displays the message text and a detailed explanation of each message that it writes to the message log for the corresponding request. You can view and update messages in the Message Catalog within the appropriate message set.

CHAPTER 25

Working With Enrollment Request Messages

This chapter discusses how to act upon enrollment request messages.

Understanding Enrollment Request Messages

This section lists the most frequent messages that the enrollment engine displays when you process an enrollment request, as well as the actions you take to resolve these messages. You can access the message catalog by navigating to PeopleTools, Utilities, Use, Message Catalog. In the English language select message set number 14640.

Number	Severity	Message Text	Explanation	Action
3	Error	Not Enrolled in Class, Drop Not Processed.	The requested drop transaction was not processed. No enrollment records for the specified class for this term were found. Verify the class number and term, and resubmit the request.	Check the student's class schedule.
4	Error	Already In Drop Status.	The requested drop transaction was not processed. The class is already in drop status for the term specified. Verify the term and class number, and resubmit the request.	Check student's enrollment status in the class.

Number	Severity	Message Text	Explanation	Action
5	Error	Already Enrolled in Class, Add Not Processed.	The enrollment request was not processed; an enrollment record already exists for the class and term specified. Verify class number and term, and resubmit the request.	Check student's enrollment status in the class.
6	Error	Class %1 Not Enrolled, Class And Wait List Are Full.	The requested enrollment add was not processed. The enrollment limit for the class has been reached, and there is no room on the wait list.	The class enrollment and wait list capacities have been reached. Verify these limits on the Schedule of Classes - Enrollment Control page.
7	Error	Not Enrolled, Class %1 Full.	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached. To attempt to wait list, resubmit the request with the Wait List option selected.	The class enrollment capacity has been reached. Verify the enrollment limit on the Schedule of Classes - Enrollment Control page. The system also displays this message if the available space in the class is subject to reserve capacity requirements.
11	Error	Class Table In Use, Not Available For Drop Request.	The class table is being used by another system resource and is not available for the specified class. The drop request was not processed. Resubmit the request.	Another user is maintaining the class being dropped.

Number	Severity	Message Text	Explanation	Action
12	Error	Enrollment Record In Use, Not Available For Drop Request.	The Enrollment record is in use by another system resource and is not available to process the drop request. Try again later.	Another user or process is accessing the student's enrollment record.
13	Error	Unable to Drop class, will drop below required minimum units for enrollment.	The requested drop transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
14	Error	Unable to Drop class, Corequisites exist.	The requested drop transaction was not processed. Enrollment exists in a corequisite class. Classes must be dropped together.	The class being dropped is a corequisite to another class in the student's class schedule. Check the requisites for the other classes in the student's class schedule. Override requisites if necessary.
17	Error	Time Scheduling Conflict for class %1 and %2, not enrolled.	A scheduling conflict exists with a currently enrolled class. Select another class, or override the time conflict.	
18	Error	Requisites not met for Class, not enrolled.	Requirements have not been met to enroll in the specified class. The enrollment transaction was not processed.	

Number	Severity	Message Text	Explanation	Action
19	Error	Corequisites Not Met For Class, Not Enrolled.	Corequirements necessary to enroll in the class have not be met. The enrollment request was unsuccessful.	The class requires concurrent enrollment in another class. Check the requisites for this class. Override requisites if necessary.
20	Error	Class taken previously, Repeat not allowed.	None.	Review the repeat-for-credit rules for the class on the Course Catalog - Basic Data page.
29	Error	Class %1 Not Waitlisted, Waitlist is Full.	The Drop-To-Waitlist transaction was not processed.	Check the wait list capacity for the class.
30	Error	Maximum term Unit Load exceeded.	Add transaction not processed. The maximum term unit load would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
31	Error	Record Not Changed, Not on Waitlist	The Change-Waitlist-Position transaction was not processed.	The student is not wait-listed for this class.
32	Error	Enrollment is not allowed for this class: It is outside the Career of Study.	The Add transaction was not processed. Enrollment in this class is not allowed for this academic career.	The student's career has a career pointer rule, or the student's program references a career pointer exception rule, which prevents enrollment in this academic career.

Number	Severity	Message Text	Explanation	Action
36	Error	Error With Grade and Grade Basis For Penalty Drop Reason.	There is a setup error for drops with penalty. The grade is not compatible with the grade basis. Correct the setup. Drop not processed.	Check the drop-with-penalty setup on the Session Calendar 2 page or the Academic Program - Dynamic Date page for the student's primary academic program.
38	Error	%1 to Enroll in Class, Add Not Processed.	Consent is needed to enroll in the class. The add transaction was not processed.	The student must have a permission number to enroll in this class. A permission number can be generated, or a student-specific permission can be granted on the Class Permission page.
39	Message	Permission Number Entered Is Not Valid.	The permission number used is invalid. The transaction was processed without the permission number.	Check the Class Permissions page.
45	Message	Enrollment Drop Date is Past Drop With Penalty Date.	The enrollment drop date is past the pre-established drop with penalty date. Drop was processed as within drop with penalty date.	The class is being dropped after the drop-with-penalty or drop-with-greater-penalty deadline. The enrollment engine still processes the drop and uses the rule from last penalty date defined on the Session Calendar 2 page.

Number	Severity	Message Text	Explanation	Action
48	Error	Auto Enroll Not Processed, Section Not Associated with the Enrollment Section.	The class specified for the auto enrollment function is not associated with the enrollment section of the add transaction. Auto enrollment was not performed.	Check the set up on the Schedule of Classes component. All enrollment sections within the same class association must use the same component.
50	Error	Class Number %1 Not in Active Status. Cannot Enroll.	The add transaction was not processed. The class to be added is not in *ACTIVE* status for enrollment.	Verify the class status on the Schedule of Classes -Enrollment Control page.
53	Error	Related Class Enrollment Not Completed, Section Not Associated with Enrollment Section.	The related class enrollment function was not processed. The *related to* class is not associated with the enrollment section of the add transaction.	Check the setup on the Schedule of Classes component. All enrollment sections within the same class association must use the same component.
59	Message	Invalid Access to Override Class Limit.	User does not have access to override class limits. The transaction was processed without the override.	A user's enrollment access ID determines override access. The enrollment engine typically gives this message when an enrollment access group controls enrollment security. The enrollment access ID attached to the user's enrollment access group does not permit this override, or the user does not have time period access to the enrollment function. Check the setup on the Enrollment Group Access page.

Number	Severity	Message Text	Explanation	Action
60	Message	Invalid Access to Override Grade Basis.	User does not have access to override grade basis. The transaction was processed without the override.	See 59.
61	Message	Invalid Access to Override Class Units.	User does not have access to override class units. The transaction was processed without the override.	See 59.
62	Message	Invalid Access to Override Unit Load.	User does not have access to override unit load. The transaction was processed without the override.	See 59.
63	Message	Invalid Access to Override Class Links.	User does not have access to override class links. The transaction was processed without the override.	See 59.
64	Message	Invalid Access to Override Class Permission.	User does not have access to override class permission. The transaction was processed without the override.	See 59.
65	Message	Invalid Access to Override Requisites.	User does not have access to override requisites. The transaction was processed without the override.	See 59.
66	Message	Invalid Access to Override Time Conflict.	User does not have access override time conflicts. The transaction was processed without the override.	See 59.

Number	Severity	Message Text	Explanation	Action
67	Message	Invalid Access to Override Career.	User does not have access to override career. The transaction was processed without the override.	See 59.
68	Message	Invalid Access to Wait List Function.	User does not have access to the wait list functionality. The transaction was processed without the override.	See 59.
69	Error	Invalid Access to Enrollment Transaction.	User does not have access to enrollment transaction. The transaction was not processed.	The enrollment access ID does not permit access to this function. Check the time period security for the access ID on the Enrollment Security Table page and the session time period deadline on the Session Time Period Table page.
70	Error	Invalid Access to Enrollment With Permission Transaction.	User does not have access to the Enrollment With Permission transaction. The transaction was not processed.	See 69.
71	Error	Invalid Access to Drop Transaction.	User does not have access to the drop transaction. The transaction was not processed.	See 69.
73	Error	Invalid Access to Update Grade Basis.	User does not have access to update grade basis. The transaction was not processed.	See 69.

Number	Severity	Message Text	Explanation	Action
74	Error	Invalid Access to Update Units.	User does not have access to update units. The transaction was not processed.	See 69.
75	Error	Invalid Access the Change Wait List Transaction.	User does not have access to the change wait list transaction. The transaction was not processed.	See 69.
76	Error	Invalid Access to the Add Grade Transaction.	User does not have access to the add grade transaction. The transaction was not processed.	See 69.
77	Error	Invalid Access to Change Grade.	User does not have access to the change grade transaction. The transaction was not processed.	See 69.
78	Error	Class Table in Use, Not Available for Add Request.	The Class Table is being used by another process and is unavailable for updating. Retry request.	Another user or process is maintaining the class number used for the enrollment transaction.
79	Error	No Valid Appointment Found And Open Enrollment Period Has Not Begun.	The open enrollment period has not begun and no valid enrollment appointment was found. The enrollment request was not processed.	Use the Student Enrollment Appointment page to verify if the student has a valid appointment.
80	Error	Wait List Period Has Ended.	The wait list request was not processed.	The last date for wait list defined on the Session Table page has passed.

Number	Severity	Message Text	Explanation	Action
83	Error	Invalid Drop Date; Drop Date is Prior To Add Date.	The drop date entered is prior to the add date of the class being dropped. Re-enter the transaction with the correct date.	Verify the add date for the class. This error condition can occur when attempting to process a retroactive drop.
84	Error	Unit Limit Exceeded For Appointment Period.	The class add transaction was not processed. Adding the class would exceed the unit limit allowed for the appointment period.	Check the student's appointment limits using the Student Enrollment Appointment page.
85	Message	Invalid Access to Override Enroll Action Date.	User does not have access to override enroll action date. The transaction was processed without the override.	See 60.
86	Error	Swap not processed, Hold on record.	There is a hold on this record preventing the swap transaction from being processed. The hold must be removed before the swap is processed.	Check the student's service indicators.
87	Error	Hold on record, Add not processed.	There is a hold on this record, preventing the add from being processed. The hold must be removed to process the add transaction.	Check the student's service indicators.
88	Error	A Required Related Class (component %1) must also be Selected.	There is an additional component required for enrollment that is missing.	The class requires enrollment in a related component. Related components can be selected using the Related 1 and Related 2 fields.

Number	Severity	Message Text	Explanation	Action
89	Message	Invalid Access To Override Service Indicator	The user does not have access to override service indicator. The transaction was processed without the override.	See 60.
90	Message	Invalid Access to Override Appointment Times.	The user does not have access to override appointment times. The transaction was processed without the override.	See 60.
91	Error	Maximum Session Unit Load Exceeded.	The maximum session unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session limits using the Student Enrollment Appointment page.
92	Error	Maximum Term Course Load Exceeded.	The maximum term course load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
93	Error	Maximum Session Course Load Exceeded.	The maximum session course load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's course limit on the Student Enrollment Appointment page.
94	Error	Unable To Process Drop, Session Calendar Record Missing.	There is no Academic Session Calendar Record defined for the session of the drop transaction. A session must be defined to process the drop.	A session calendar row must be present to drop a regularly scheduled class. Check the academic calendar setup for the session on the Academic Calendar component.

Number	Severity	Message Text	Explanation	Action
97	Error	Maximum Session NoGPA Units Exceeded.	The maximum session NoGPA unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
98	Error	Maximum Session Audit Units Exceeded.	The maximum session audit unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
99	Error	Maximum Session Wait Units Exceeded	The maximum session wait unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
100	Error	Maximum Term NoGPA Units Exceeded.	The maximum term NoGPA unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
101	Error	Maximum Term Audit Units Exceeded.	The maximum term audit unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
102	Error	Maximum Term Wait Units Exceeded.	The maximum term wait unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.

Number	Severity	Message Text	Explanation	Action
116	Message	Invalid Access to Override Requirement Designation.	The user does not have access to override requirement designation. The transaction was processed without the override.	See 60.
120	Error	Appointment Audit Unit Limit Exceeded, Class Not Added.	Add transaction not processed. Adding this class would exceed the appointment audit unit limit.	Check the student's unit limits on the Student Enrollment Appointment page.
121	Error	Appointment No GPA Unit Limit Exceeded, Class Not Added.	Add transaction not processed. Adding class would exceed the appointment No GPA unit limit.	Check the student's unit limits on the Student Enrollment Appointment page.
123	Error	Maximum Term Load Exceeded, Units Not Changed.	Units not changed. The maximum term unit limit would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
124	Error	Maximum Session Load Exceeded, Units Not Changed.	Units not changed. The maximum session unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.
125	Error	Maximum Appointment Unit Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
126	Error	Maximum No GPA Session Load Exceeded, Units Not Changed.	Units not changed. The maximum No GPA session unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.

Number	Severity	Message Text	Explanation	Action
127	Error	Maximum Term No GPA Load Exceeded, Units Not Changed.	Units not changed. The maximum term No GPA load would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
128	Error	Maximum Session Audit Load Exceeded, Units Not Changed.	Units not changed. The maximum session audit unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.
129	Error	Maximum Audit Term Units Exceeded, Units Not Changed.	Units not changed. The maximum audit term units would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
130	Error	Maximum Appointment No GPA Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment No GPA unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
131	Error	Maximum Appointment Audit Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment audit unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
133	Message	Permission to enroll in this class is required.	The class falls outside of the career of study.	The career pointer rules for the student's career or a career pointer exception rule for the student's primary academic program requires that the student have permission to take this class. Assign a permission number on the Class Permission page.

Number	Severity	Message Text	Explanation	Action
137	Error	Withdrawn from Term - Changes are not allowed	The transaction was not processed.	The student has been withdrawn for this term. Verify the student's status in this term on the Term History component.
138	Error	Warning - Enrollment status is Withdrawn.	Although enrollment status is *Withdrawn,* changes would be applied.	The enrollment engine gives this message when a grade change is made for a student who has been withdrawn from the term.
139	Error	Enrollment status is Cancelled for Term - No Enrollment Activity Allowed	Transaction not processed.	The student enrollment has been cancelled for this term. Verify the student's status in this term on the Term History component.
141	Message	The Requirement Designation Options was set to 'YES' by the enrollment process.	None.	This message is given when a student is enrolled in a class with an optional requirement designation and the Yes option was selected. The enrollment engine gives the same message where the requirement designation is required and is therefore set to *yes* for all students enrolling in the class.

Number	Severity	Message Text	Explanation	Action
142	Message	Only those with Academic Plan %1 are allowed to take Requirement Designation %2.	The enrollment process set the designation option to *NO*.	The enrollment engine gives this message when a student is enrolled in a class with an optional requirement designation and the Yes option is selected, but the student failed to meet the requirements for the requirement designation. The same message would be given for a non-optional requirement designation where the student does not meet the requirements.
143	Message	Class %1 is Full, Resectioned to Class %2	The selected class for enrollment is full; the request was processed with the resectioned class.	The enrollment engine gives this message when the Resection option is used in class enrollment control. The system enrolls the student in the resectioned section if the original choice is closed.

Number	Severity	Message Text	Explanation	Action
144	Message	A Grade of %1 has been assigned for this Drop Request.	The drop transaction assigned a grade to the student, leaving the student in *drop enrolled* status.	The class has been dropped during the drop-with-penalty or drop-with-greater-penalty period defined on the Session Calendar 2 page or the dates calculated by the Dynamic Class Dates process. For dynamically dated classes, use the Dynamic Class Dates page to view or maintain the dates. For OEE classes, use the Student OEE Enroll Data page.
146	Error	Multiple Enrollment not allowed for course, add not processed.	Multiple enrollment for this course is not allowed. The transaction was not processed.	A student can enroll in a the same course only once per term, unless the course permits multiple enrollments in a term (this option is set on the Course Catalog - Catalog Data page). The system also gives this message when a swap between different sections of the same course would result in a penalty grade on the swap from class.
160	Error	Requested change will put units below minimum Term Load. Not processed.	None.	As a result of a drop or swap transaction, the student will drop below the minimum units required by his or her academic program.

Number	Severity	Message Text	Explanation	Action
165	Warning	Auto Enroll sections used, related classes not used.	When specifying both auto enroll sections and related class sections, only the auto enroll sections are used for enrollment. The related classes were ignored.	
195	Message	First Date to Enroll has not been reached - not enrolled	The first date for enrollment has not been reached for the session or from the dynamic class data. Enrollment not allowed.	Check the Session Table page's First Date to Enroll field, or, for dynamically dated classes, the Dynamic Class Dates page.
196	Message	Last Date to Enroll has expired.	The last date for enrollment has expired for the session or from the dynamic class data. Enrollment not allowed.	Check the Session Table page's Last Date to Enroll field, or, for dynamically dated classes, the Dynamic Class Dates page.
197	Message	Student not eligible for enrollment in an OEE course	Student is attempting to enroll in an OEE course but neither the student's career nor student's primary academic program allows OEE enrollment.	The student's primary academic program does not permit enrollment into OEE classes. Verify that the Allow OEE Enrollment option is set correctly on the Academic Program Table component.
203	Message	OEE Date Calc Error: %1, %2.	The OEE date calculation routine has encountered setup or data problem. Review the type of error in the message text. Enrollment not processed.	The enrollment engine did not find an OEE dynamic date rule on the dynamic class dates table or at the course offering level. Review the course offering and dynamic class date setup for the class.

Number	Severity	Message Text	Explanation	Action
205	Message	Missing Drop Retain Reason Code	When dropping a course, the enrollment drop retain reason code was not defined from either the Academic Calendar Session, or, if dynamic dates or OEE enrollment are used, the drop retain reason code was not defined from the Academic Program Table. Drop not processed.	An enrollment action reason is required for drop/retain processing. Check the Session Calendar 2 page for regularly scheduled courses. For dynamically dated classes, including OEE classes, the drop/retain reason is entered on the Academic Program Table - Dynamic Dates page.
206	Error	Invalid access to the Requirement Designation Change Transaction	User does not have access to the change Requirement Designation transaction. The transaction was not processed.	See 69.

Number	Severity	Message Text	Explanation	Action
209	Error	Optional component class %1 is full. Resubmit without this component or waitlist all components.	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached. To attempt to waitlist, resubmit the request with the waitlist option specified. To enroll in the class without the optional component, delete the optional component class number and resubmit.	To attempt to wait list all components of the class, select the Wait List Okay check box and resubmit the request. To attempt to enroll in the class without the optional component, remove the optional component class number from the related class field and resubmit the request.
210	Error	Optional Related Class %1 add not processed. Class and Waitlist are full.	Optional related component is closed and there is no room on the waitlist. To enroll in the class without the optional component, delete the optional component class number and resubmit.	To attempt to enroll in the class without the optional component, remove the optional component class number from the related class field and resubmit the request.

CHAPTER 26

Using Enrollment Related Processes

This chapter discusses how to:

- Create historical enrollment records.
- Manage wait lists.
- Process withdrawals and cancellations.
- Purge drop enrollment records.

Creating Historical Enrollment Records

This section discusses how to:

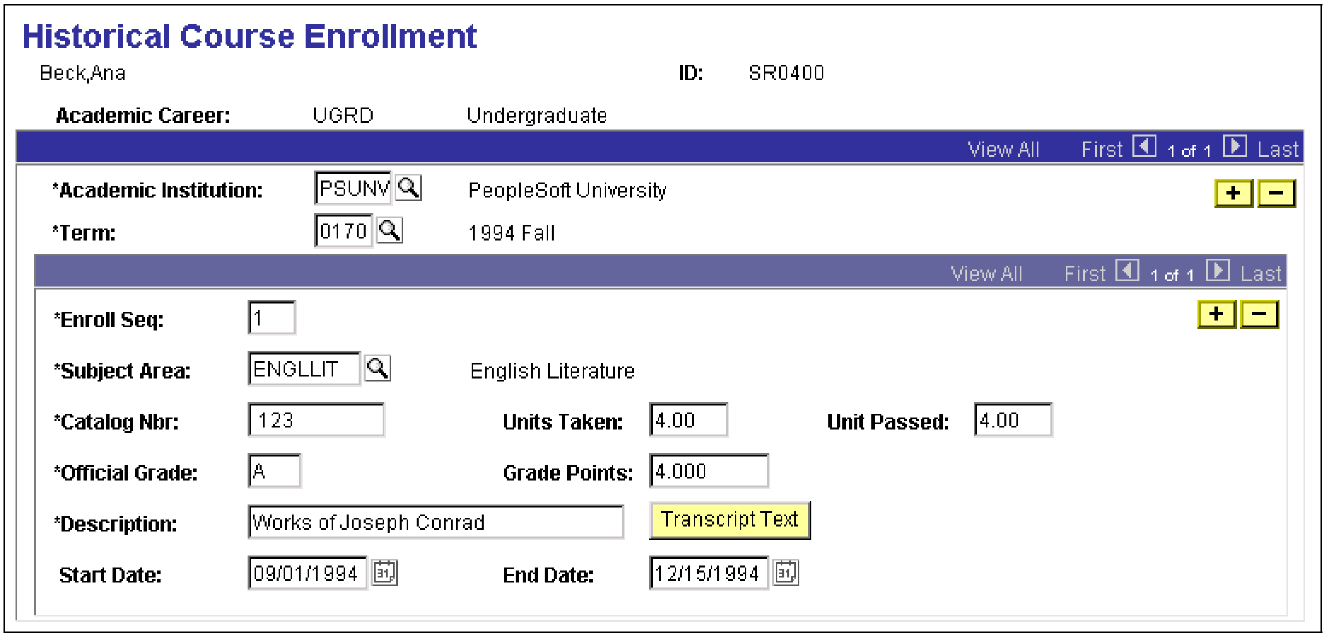
- Record historical enrollment records.
- Enter free-form transcript text.

Pages Used to Create Historical Enrollment Records

Page Name	Object Name	Navigation	Usage
Historical Enrollment	HIST_CRSE_ENROLLMT	Manage Student Records, Manage Academic Records, Use, Historical Course Enrollment	Record enrollment data when you do not have access to your PeopleSoft Student Administration system, to your historical course catalog, and to a schedule of classes. When you use this page to convert historical enrollment records to PeopleSoft, you will most likely run a Structured Query Report (SQR) or other such program to populate the application tables that supports this page. These application tables are HIST_TERM and HIST_TERM_ENRL. You can then access this page to make corrections as necessary.
Historical Course Enrollment - Transcript Text	HIST_CRSE_TRNS_TXT	Manage Student Records, Manage Academic Records, Use, Historical Course Enrollment, Transcript Text button	Enter free-form transcript text. This information, along with the historical enrollment information, appears on the student's transcript.

Recording Historical Enrollment Records

Access the Historical Enrollment page.



Historical Course Enrollment page

Academic Institution	Select the academic institution for which you want to record historical enrollment data for the student.
Term	Select the term for which you want to record historical enrollment data for the student. The term that you select must be less than or equal to the last term for historical enrollment data for the specified academic career.
Enroll Seq (enrollment sequence)	Indicates the sequence in which a student enrolled in each course within a term. The system by default displays a chronological enrollment sequence number starting with *1,* but you can override this default value for any row.
Subject Area	Select the subject area of the course for which you want to record historical enrollment data for the student.
Catalog Number	Enter the catalog number of the course for which you want to record historical enrollment data for the student. Because this page is stand-alone, it has no connection to your current course catalog.
Units Taken	Enter the number of units that the student took for the course.
Units Passed	Enter the number of units that the student passed for the course.
Official Grade	Enter the official grade that the student received for the course.
Grade Points	Enter the grade points that the student received for the course.
Description	Enter the title of the course.
Transcript Text	Click to access the Historical Course Enrollment - Transcript Text page, where you can enter free-form transcript text. This information, along with the historical enrollment information, appears on the student’s transcript.

Note. Courses entered on the Historical Course Enrollment page *do not* impact Academic Advisement's analysis processes or academic statistics. To include historical courses in advisement processes and academic statistics, you must treat them as transfer courses. Create a fictional academic institution, use the transfer credit process to create pseudo incoming courses, and then map those courses to your academic institution's course equivalencies.

See Also

Chapter 7, "Setting Up Transfer Credit Processing," Reviewing Examples of Course Equivalencies, page 176

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Preparing for Data Conversion"

Entering Free-Form Transcript Text

Access the Historical Course Enrollment - Transcript Text page.

Managing Wait Lists

This section provides an overview of wait list management and discusses how to:

- View a student's wait list position.
- Move students from wait lists to enrollment.
- Purge students from wait lists.

Understanding Wait List Management

The wait list management functionality in PeopleSoft Student Records enables you to set processing parameters that define the groups of students to move from wait lists to enrollment into classes within a specific enrollment period.

The Wait List feature is controlled by the Auto Enroll From Wait List and Wait List Capacity options (on the Enrollment Control page of the schedule of classes) and the Last Day For Wait List date (on the Session Table page for classes with traditional academic calendars and on the Dynamic Class Dates page for classes with dynamic academic calendars). In addition, students have a wait list unit limit defined by academic load for terms and sessions within their primary academic programs on the Enrollment page and Session page of the Academic Program Table component.

If you select the Auto Enroll From Wait List option for a class, you can use the wait list process to move qualified students from the class wait list to enrollment into that class as space becomes available. If you do not select this option, you can manually move students from the wait list to enrollment into a class by selecting Override Class Limit on the enrollment processing component. The manual process is best monitored by the instructor of the class.

As you manage your wait lists, you can use the Class Roster page to view students on the wait list for a particular class section. The system performs corequisite and prerequisite checking before placing a student on the waitlist. However, the system does *not* check for a scheduling time conflict before it places a student on a wait list. Scheduling time conflicts and all of the other enrollment edits are performed when the system attempts to move a student from the wait list to enrollment in a class. You can view an individual student's position and status on the wait list for a class through the Wait List Position link. This link appears only for applicable enrollment requests on the enrollment request processing pages.

Enabling the Wait List Process

To enable the wait list process:

1. Set the last date for wait list for sessions on the Session Table page of the Term/Session Table component.
2. Define the maximum wait list units for terms within academic programs on the Enrollment page of the Academic Program Table component.
3. Define the maximum wait list units for sessions within academic programs on the Session page of the Academic Program Table component.
4. Select the Auto Enroll From Wait List check box for classes on the Enrollment Control page of the schedule of classes.

See Also

Chapter 27, "Viewing Class Enrollment Data," Viewing Class Rosters, page 603

Pages Used to Manage Wait Lists

Page Name	Object Name	Navigation	Usage
Wait List Position	ENRL_REQ_WL	Click the Wait List Position link on the corresponding enrollment processing page.	View a student's status and position on the wait list for a class section.
Wait List Process	RUNCTL_SRWTLST	Manage Student Records, Manage Academic Records, Process, Wait List	Move groups of students from class wait lists to enrollment into classes. If you need to manually move students from the wait list to enrollment into a class, you must drop the student from the wait listed class then add the student into the class with the appropriate overrides selected.
Wait List Purge	RUNCTL_SRWTLSTPURG	Manage Student Records, Manage Academic Records, Process, Wait List Purge	Run a the Wait List Purge process to delete groups of students in waiting status based on the run parameters that you specify. The wait list purge process lets you purge the wait list for more than just one class. You can use the process to purge the wait list for all classes in an entire term, academic career, session, subject area, or campus based on the your run parameters. Run the purge process on past terms when information about a student being wait-listed is no longer pertinent.

Viewing a Student's Wait List Position

Access the Wait List Position page.

Note. Students can also view their statuses and positions on the wait list for class sections through the enrollment functionality within the PeopleSoft Learner Services collaborative application. The system displays wait list position on the View My Class Schedule page.

Moving Students From the Wait Lists to Enrollment

Access the Wait List Process page.

Institution Select the academic institution for which you want to move groups of students from class wait lists to enrollment into a class.

Term Select the term for which you want to move groups of students from class wait lists to enrollment into a class.

Session	If you want to limit wait list processing to a specific session, select a valid value.
Subject Area	If you want to limit wait list processing to a specific subject area, select a valid value. If you select a value for this field, the Course ID field and Class Nbr field become unavailable for edit.
Course ID	If you want to limit wait list processing to a specific course, select a valid value. If you select a value for this field, the Subject Area field and Class Nbr field become unavailable for edit.
Class Nbr (class number)	If you want to limit wait list processing to a specific class, select a valid value. If you select a value for this field, the Subject Area field and Course ID field become unavailable for edit.
Wait List Process Switch	The wait list process switch instructs the process how to evaluate wait list candidates. Select *Y* to process all *new* wait list candidates eligible for wait list evaluation. Select *A* to process *all* wait list candidates eligible for wait list evaluation. For example, a class has five students on the wait list and three spaces become open in the class. When you run the wait list process, it fills the three spaces, and two students remain on the wait list. At this point the class is no longer new to the wait list process. The only way it would be evaluated again is if space opened in the class and you selected *A* as the Wait List Process Switch value.

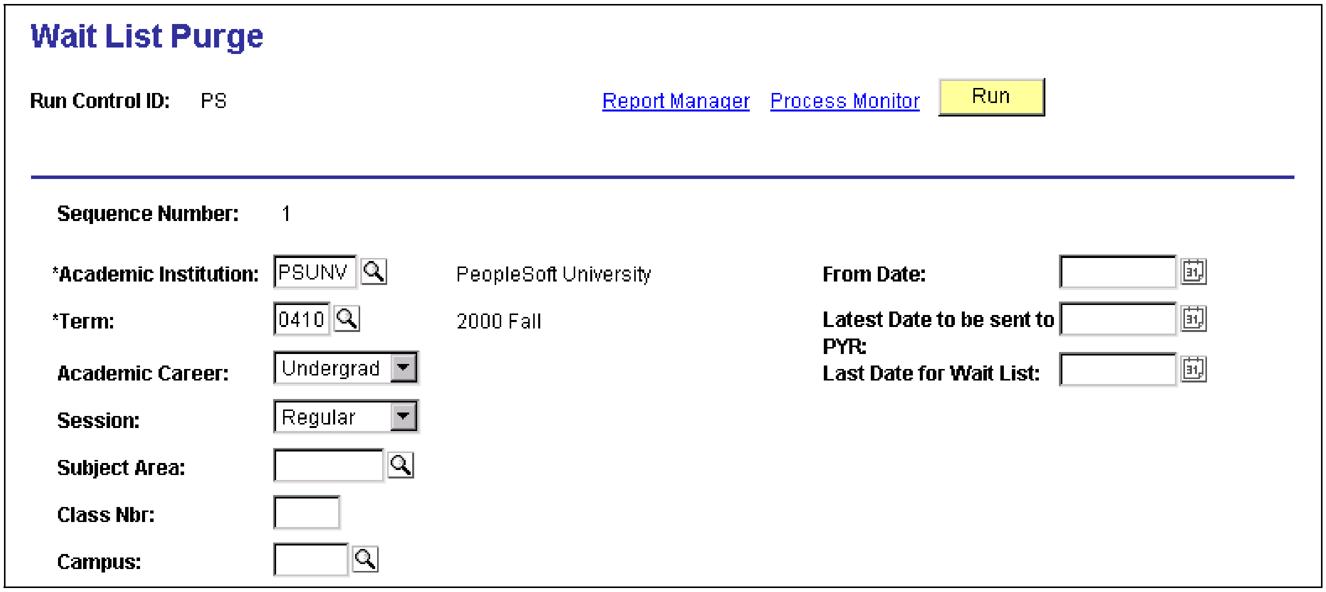
Run the Wait List COBOL/SQL process (SRPCWAIT) as needed.

The process generates a new enrollment request for the student and displays one of the following enrollment status reasons on the new request: *RCAP* (reserve slots full), *FULL* (section is full), *CREQ* (corequisite enrollment), *ALIM* (appointment limit exceeded), *TLIM* (term limit exceeded), *SLIM* (session limit exceeded), *TIME* (time conflict exists), *RCMP* (related component), *TIMR* (time conflict resolved), or *EWAT* (enrolled from wait list). You can view these enrollment requests through the Block Enroll component.

If a class has reserve capacity rules and space opens in a reserve capacity group, the process evaluates whether students on the wait list meet these reserve capacity rules. If no students meet the rules, then the process moves no one from the class wait list to enrollment into the class. If a class has multiple reserve capacity groups and space opens in more than one group *and* a student matches the criteria of more than one reserve capacity group, the system enrolls the student into the first reserve capacity group it finds where the student meets the reserve capacity rules.

Purging Students From Wait Lists

Access the Wait List Purge page.



Wait List Purge

Run Control ID: PS

Report Manager Process Monitor Run

Sequence Number: 1

*Academic Institution: PSUNV PeopleSoft University

*Term: 0410 2000 Fall

Academic Career: Undergrad

Session: Regular

Subject Area:

Class Nbr:

Campus:

From Date:

Latest Date to be sent to PYR:

Last Date for Wait List:

Wait List Purge page

Sequence Number

The system displays a default sequence number. It is for internal processing purposes only.

Academic Institution

Select the academic institution for which you want to purge students from wait lists.

Term

Select the term for which you want to purge students from wait lists.

Academic Career

If you want to purge students from wait lists for classes within a specific academic career, select a value for this field.

Note. This field and the remaining fields on this page are optional. They provide the means of searching for wait lists by various parameters.

Session

If you want to purge students from wait lists for classes within a specific session, select a value for this field.

Subject Area

If you want to purge students from wait lists for a specific class subject area, select a value for this field.

Class Nbr (class number)

If you want to purge students from wait lists for a specific class, select a value for this field.

Campus

If you want to purge students from wait lists for classes at a specific campus, select a value for this field.

From Date

If you want to purge from wait lists the students in waiting status with an class start date greater than or equal to a certain date, enter the date in this field.

To Date

If you want to purge from wait lists the students in waiting status with a class start date less than or equal to a certain date, enter the date in this field. The system displays, by default, the value in the From Date field.

Last Date for Wait List	Enter a value in this field to have the process search for active wait lists in which the class *last date for wait list* value is less than or equal to the value that you specify here. Define last date for wait list values on the Session Table page for classes with traditional academic calendars.

Processing Withdrawals and Cancellations

This section provides an overview of withdrawal and cancellation processing and discusses how to:

- Post withdrawals and cancellations for terms.
- Post withdrawals and cancellations for sessions.
- Resubmit failed withdrawal and cancellation requests.
- View withdrawal and cancellation request status.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, "Calculating Tuition and Fees"

Understanding Withdrawal and Cancellation Processing

In PeopleSoft Student Records, you can enter and post withdrawals or cancellations for a term or session on a student-by-student basis through the Student Records Term Withdrawal COBOL/SQL process (SRPCWDPR). When you withdrawal or cancel a student from a term, the process performs a series of session withdrawals or cancellations to complete the term withdrawal or cancellation. A student cannot be cancelled from a session, and therefore a term, in which grades have been posted. The system prevents this with an error message and does so because enrollments for cancelled terms and sessions are always excluded from the transcript. Withdrawals can be processed when grades are present, however the classes with grades will be excluded from the process. A warning message appears when you select the Withdrawal code for a session or term where grades are present.

Important! If you have not calculated the landmark calendar dates for the affected class enrollments, the Student Records Term Withdrawal process fails the entire withdrawal or cancellation request.

For term and session *cancellations,* the Student Records Term Withdrawal COBOL/SQL process retrieves the applicable cancel deadline and reason as follows.

- If the impacted student enrollment record (STDNT_ENRL) is a traditional class enrollment, the process retrieves the cancel deadline and reason according to the values set on the Session Calendar 1 page.
- If the impacted student enrollment record is a dynamic date class enrollment, the process retrieves the cancel deadline calculated by the Dynamic Class Dates process and displayed on the Dynamic Class Data page and the cancel reason according to the value set on the Dynamic Date page of the Academic Program Table component. If the process fails to find a row in the Dynamic Class Dates table for the class, it will attempt to retrieve this information from the session academic calendar table. This will also occur if the Dynamic date cancellation reason has not been populated. In either case, the process searches for a row in the session calendar table and uses the field and deadline from that table if it exists.

- If the impacted student enrollment record is an open entry/exit class enrollment, the process retrieves the cancel deadline calculated upon enrollment and displayed on the Student Enroll OEE page and the cancel reason according to the value set on the Dynamic Date page of the Academic Program Table component.

If this deadline has passed, the process displays a warning message. You then have the option to cancel or continue with the request. If you continue, the process does the following.

- Generates and processes enrollment requests for each impacted student enrollment record.
- Retains the affected student enrollment records as drops with enrollment action reasons equal to the applicable cancel reason.
- Updates the withdrawal code on the affected student session records (STDNT_SESSION) to a value of cancelled.
- Updates the withdrawal code on the affected student career term record (STDNT_CAR_TERM) to a value of cancelled for term cancellations only.

For term and session *withdrawals,* the Student Records Term Withdrawal process determines the deadline by comparing the last date of attendance entered on the Term Withdrawal or Session Withdrawal page to the withdrawal deadlines that you set on the Session Calendar 1 page or to the withdrawal deadlines that the Dynamic Class Dates process calculates and displays on the Dynamic Class Data page or Student Enroll OEE page. The Student Records Term Withdrawal process then generates and processes the enrollment requests for each impacted student enrollment record (STDNT_ENRL), retaining the impacted records with student enrollment status of dropped. The process further updates the records depending on the enrollment type (traditional, dynamic date, or open entry/exit) and the withdrawal type (without penalty, with penalty, or with greater penalty).

For withdrawals from traditional class enrollments, the process updates the impacted student enrollment records as follows.

- If the last date of attendance is less than or equal to the withdraw-without-penalty deadline on the Session Calendar 1 page, the process updates the last enrollment action reason to the withdraw-without-penalty reason set on the Session Calendar 1 page.
- If the last date of attendance is less than or equal to the withdraw-with-penalty deadline, the process determines the student's grading basis for the class, then assigns to the impacted student enrollment record the penalty grade value that is set on the Grading Scheme Table page for that grading basis.

  If the penalty grade is not defined, the process assigns the penalty grade according to the grading basis and grade set on the Session Calendar 1 page. Depending on how the grade is set up, the process can reduce in progress units, which can potentially affect the student's academic load and financial aid load.
- If the last date of attendance is less than or equal to the withdraw-with-greater-penalty deadline, the process functionality parallels that of the withdraw-with-penalty functionality.

For withdrawals from dynamic date and open entry/exit class enrollments, the process updates the impacted student enrollment records as follows.

- If the last date of attendance is less than or equal to the withdraw-without-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process updates the last enrollment action reason to the corresponding reason value set on the Dynamic Date page of the Academic Program Table component for the student's primary academic program.
- If the last date of attendance is less than or equal to the withdraw-with-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process determines the class

grading basis, then assigns to the impacted student enrollment record the penalty grade value that is set on the Grading Scheme Table page for that grading basis.

If the penalty grade is not defined, the processes assigns the penalty grade according to the grading basis and grade set on the Dynamic Date page of the Academic Program Table component for the student's primary academic program. Depending on how the grade is set up, the process can reduce in progress units, which can potentially affect the student's academic load and financial aid load.

- If the last date of attendance is less than or equal to the withdraw-with-greater-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process functionality parallels that of the withdraw-with-penalty functionality.

Note. The system will use the session calendar (if it exists) when it fails to find a Dynamic Class Dates table row or the appropriate Academic Program table dynamic dates field when processing withdrawals from non-OEE dynamically dates classes.

Regardless of the enrollment and withdrawal types, the Student Records Term Withdrawal process also does the following for term and session withdrawals.

- Updates the withdraw code on the affected student session (STDNT_SESSION) records to a value of withdrew.
- Updates the withdraw code on the affected student career term (STDNT_CAR_TERM) records to a value of withdrew for term withdrawals only.

Note. The process does not update the student career term record for session withdrawals so that the student can still enroll in other sessions within the term.

Common Elements Used to Process Withdrawals and Cancellations

Errors If there are reasons preventing a successful withdrawal or cancellation, click this link to access the Term Withdrawal Run Status page, where you can check the run status and error message text for the request.

Last Date of Attendance The system by default sets the last date of attendance to the withdrawal/cancel date, but you can override the value. The Student Records Term Withdrawal process uses the last date of attendance to determine the deadlines, reasons, grading bases, and penalties for withdrawals from dynamic class date and open entry/exit enrollments. The process also uses this date for financial aid and refund calculation purposes. If you override the last date of attendance value, you must recalculate the student's tuition based on the new date you enter.

Post Session Withdrawal See definition for Post Term Withdrawal.

Post Term Withdrawal Click to post the withdrawal or cancellation to the student's record.

Before completing the posting request, the system verifies that the student has other enrollments for the term or session within the academic career. If the posting request causes the student to have no other enrollments in the term or session within the academic career, the system then identifies the student's billing careers on her or his career term record. If the student has a billing career that is the same as the academic career from which the student is withdrawing, the system stops processing the posting request and instructs you to change the student's billing career to an academic career in which the student has enrollments for the term or session. This edit prevents you from inadvertently billing a student based on an academic career in which the student has no enrollments for the term. Define a student's billing career by academic career on the Term Activation page.

For example, let's say a student is active in a term as both a graduate and undergraduate, and that the student's billing career for both academic careers within the term is her or his undergraduate career. If the student is enrolled for classes in both the graduate and undergraduate career for the term and you attempt to withdrawal the student from her or his undergraduate career for the term, the system will stop processing and issue you a warning instructing you to change the billing career for that student's graduate career term record to an academic career other than the undergraduate career.

Success Click to access the Term Withdrawal Run Status page, where you can view the message log for the request.

Withdrawal \ Cancel Select whether you want to process a withdrawal or cancellation. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Cancelled: Select to cancel all of the student's class enrollments for the specified term or session. Posting a student's term cancellation request refunds 100% of her or his fees.

Withdrew: Select to withdraw the student from all class enrollment for the specified term or session. Posting a student's term withdrawal request refunds her or his fees according to the adjustment calendar associated with the student's tuition group.

Withdrawal \ Cancel Date Enter the date that the Student Records Term Withdrawal process uses as the action date for the withdrawal or cancellation.

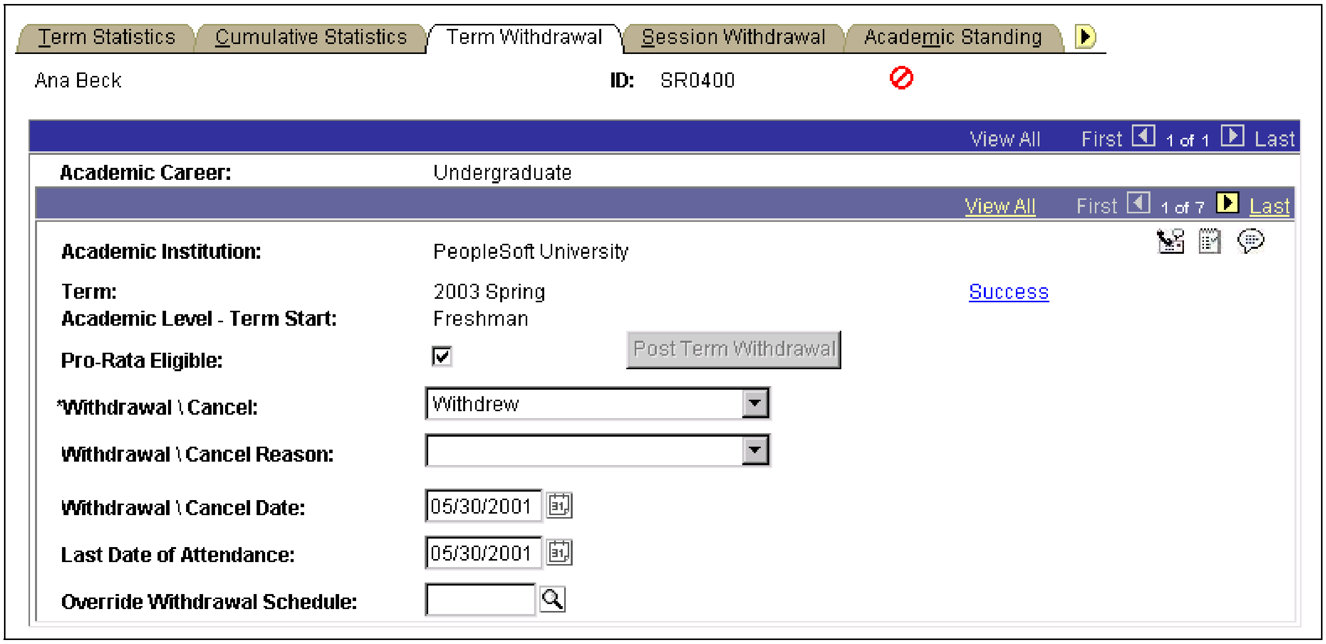
Withdrawal \ Cancel Reason Select the withdrawal/cancel reason that PeopleSoft Student Financials uses for adjustments. Modification of these translates values requires significant programming effort.

Pages Used to Process Withdrawals and Cancellations

Page Name	Object Name	Navigation	Usage
Term Withdrawal	WITHDRAWAL	Manage Student Records, Manage Academic Records, Use, Term History, Term Withdrawal	Process student withdrawals and cancellations for all sessions within an entire term.
Session Withdrawal	STDNT_SESSION_WDWL	Manage Student Records, Manage Academic Records, Use, Term History, Session Withdrawal	Process student withdrawals and cancellations for one session within a term rather than from all sessions within the entire term.
Term Withdrawal / Cancellation	RUNCTL_SRPCWDPS	Manage Student Records, Manage Academic Records, Process, Term Withdrawal/Cancellation	Resubmit failed term and session withdrawal or cancellation requests. The Withdrawal / Cancellation process is designed specifically to resubmit failed withdrawal requests. You can view the status of a request on the Term Withdrawal Run Status page. The process impacts PeopleSoft Student Financials because withdrawals and cancellations affect tuition calculation.
Term Withdrawal Run Status	TERM_WD_RUN_STATS	Manage Student Records, Manage Academic Records, Inquire, Term Withdrawal Run Status	View the status and process messages for enrollment requests generated by the withdrawal and cancellation process so that you can determine the changes that you must make to a request or a student's records To successfully post a request. You can also use this page as a record for all withdrawal and cancellation requests submitted through the Term History component.

Posting Withdrawals and Cancellations for Terms

Access the Term Withdrawal page.



Term Withdrawal page

Important! Posting a student's term cancellation request refunds 100% of their fees. Posting a student's term withdrawal request refunds her or his fees according to the adjustment calendar associated with the student's tuition group.

Academic Institution — The academic institution for which you want to process the student's withdrawal or cancellation request.

Term — The term for which you want to process the student's withdrawal or cancellation request.

Academic Level - Term Start — The student's academic level at the start of the specified term.

Pro-Rata Eligible — Select to enable pro-rata refunding—a refund to a student attending your academic institution for the first time and withdrawing on or before the 60 percent point in time. Clear this check box to not have the student considered for such a refund. Most U.S. academic institutions won't issue refunds after the 60 percent point in time.

Override Withdrawal Schedule — Select the override withdrawal schedule value. These values are specifically for refund calculations and are defined by PeopleSoft Student Financials.

See Also

Chapter 26, "Using Enrollment Related Processes," Viewing Withdrawal and Cancellation Request Status, page 592

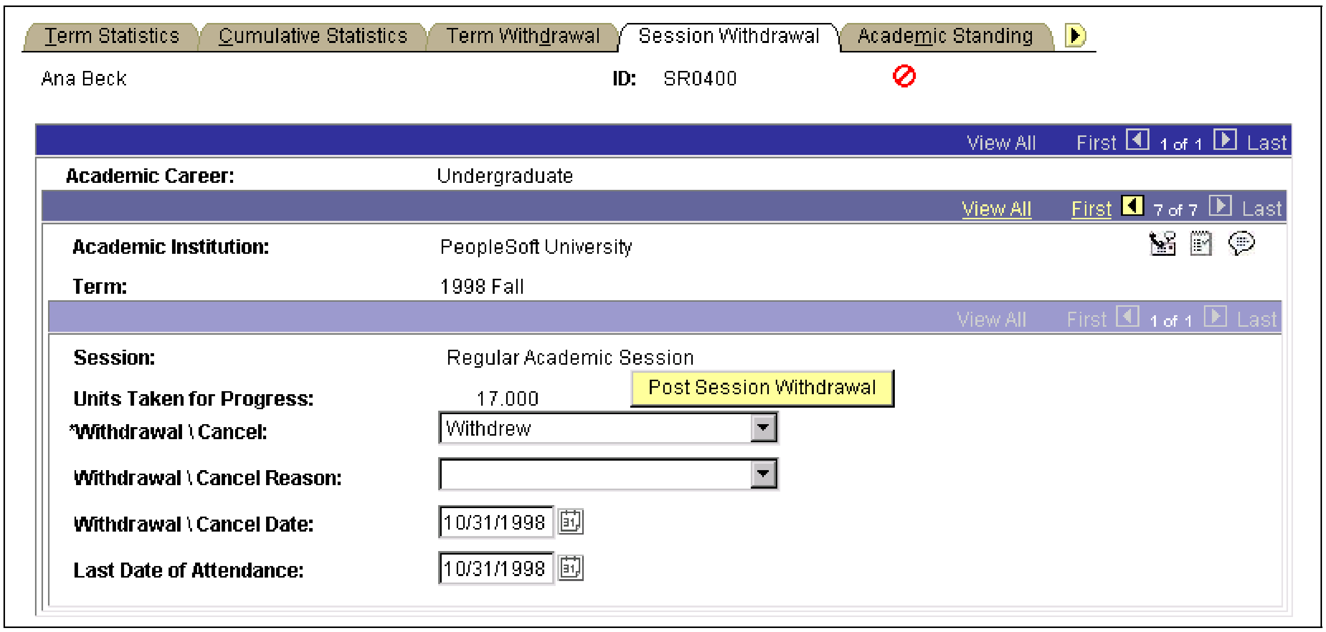
Chapter 22, "Maintaining Student Career Term Records," page 481

PeopleSoft 8 SP1 Student Financials PeopleBook, "Calculating Tuition and Fees," Recalculating Tuition and Fees after Enrollment Cancellation

PeopleSoft 8 SP1 Student Financials PeopleBook, "Setting Up Tuition Controls, Criteria, Equations, and Waivers," Setting Up Adjustment Calendars

Posting Withdrawals and Cancellations for Sessions

Access the Session Withdrawal page.



Session Withdrawal page

Session	Select the session for which you want to process the student's withdrawal or cancellation request.
Units Taken for Progress	The system displays the student's in-progress units for the specified session.

See Also

Chapter 26, "Using Enrollment Related Processes," Posting Withdrawals and Cancellations for Terms, page 589

Chapter 22, "Maintaining Student Career Term Records," page 481

Resubmitting Failed Withdrawal and Cancellation Requests

Access the Term Withdrawal / Cancellation page.

When the Term Cancellation process is run in the PeopleSoft Student Financials application, that process generates a cancellation request. To process the cancellation request, enter the request number on this page and run the Student Records Term Withdrawal process (SRPCWDPR).

From Term Withdrawal Request Enter the request number for the beginning of the range of failed term withdrawal and cancellation requests that you want to resubmit for processing.

To Term Withdrawal Request Enter the request number for the end of the range of failed term withdrawal and cancellation requests that you want to resubmit for processing.

Term Withdrawal Run Status Click to access the Term Withdrawal Run Status page, where you can view the message log for a specific term withdrawal or cancellation request.

Run the Term Withdrawal COBOL/SQL process (SRPCWDPR) as needed.

Viewing Withdrawal and Cancellation Request Status

Access the Term Withdrawal Run Status page.

See Also

Chapter 25, "Working With Enrollment Request Messages," page 557

Purging Drop Enrollment Records

Class drops are kept in the student's academic record if a student drops from a course while the *drop retain record* date is defined on the academic calendar for the session in which the student was enrolled. At some point, your institution might decide to purge the system of these retained drop enrollment records. The drop purge process affords you this functionality. Run the purge process on past terms only when information about a student's drop enrollment record is no longer pertinent.

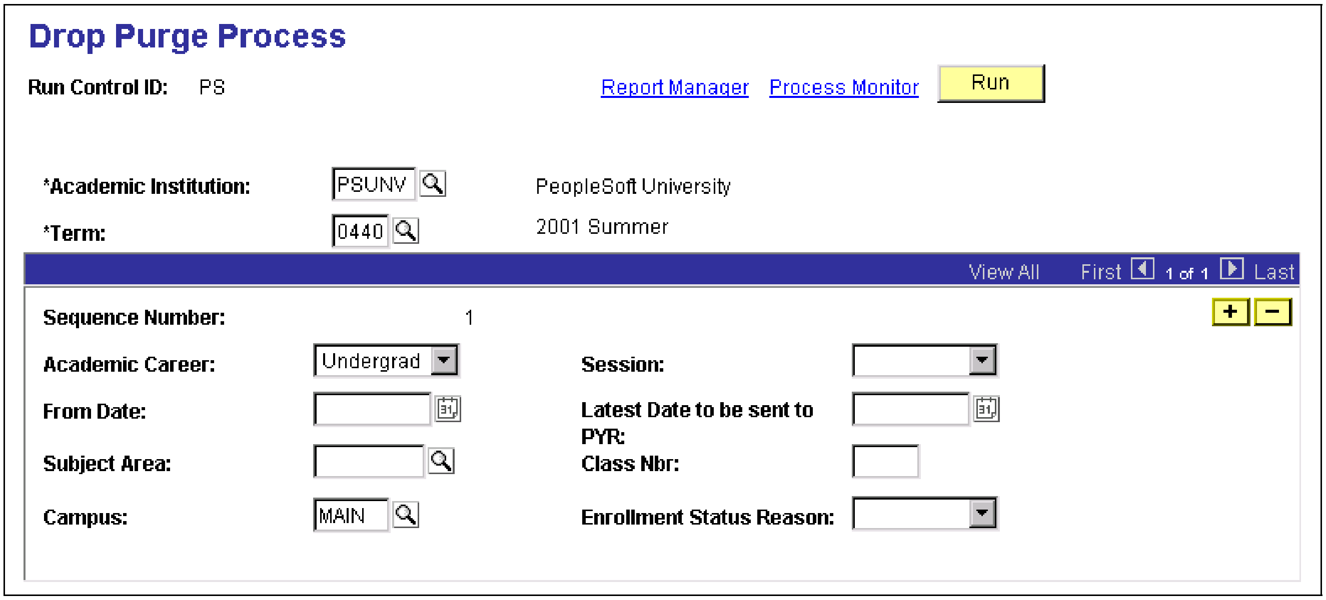
This section discusses how to delete drop enrollment records from your system.

Page Used to Delete Drop Enrollment Records

Page Name	Object Name	Navigation	Usage
Drop Purge Process	RUNCTL_SRDROPPURGE	Manage Student Records, Manage Academic Records, Process, Drop Purge	Run the Drop Purge SQR process (SRDRPURG) to delete drop enrollment records from your system based on the parameters you specify.

Deleting Drop Enrollment Records

Access the Drop Purge Process page.



Drop Purge process page

Academic Institution Select the academic institution for which you want to purge drop enrollment records.

Term Select the term for which you want to purge drop enrollment records.

Sequence Number The system displays a default sequence number. It is for internal processing purposes only.

Note. This field and the remaining fields on this page are optional. They provide the means of purging drop enrollment records by various parameters.

Academic Career If you want to purge drop enrollment records within a specific academic career, select a value.

Session If you want to purge drop enrollment records within a specific session, select a value.

From Date If you want to purge student enrollment records with a class start date (as defined on the class_tbl) greater than or equal to a specific date, enter the date.

To Date If you want to purge student enrollment records with a class start date (as defined on the class_tbl) less than or equal to a specific date, enter the date.

Subject Area If you want to purge drop enrollment records for a specific class subject area, select a value.

Class Nbr (class number) If you want to purge drop enrollment records for a specific class, select a value.

Campus If you want to purge drop enrollment records at a specific campus, select a value.

Enrollment Status Reason If you want to purge only the drop enrollment records that have a specific enrollment status reason attached to them, select the enrollment status reason. For example, you can purge drops that have an enrollment status reason of

Drop Wait and that meet your other criteria. Enrollment status reasons appear in the Status/Reason field on pages within enrollment components.

CHAPTER 27

Viewing Class Enrollment Data

This chapter lists common elements and discusses how to:

- View enrollment request history.
- View student statistics.
- View student study lists.
- Select a term in self-service.
- View student class schedules through self-service.
- View student exam schedules through self-service.
- View class rosters.
- View class rosters through self-service.
- Print class rosters.
- Produce student study lists.

Common Element Used in This Chapter

Sort Option Select how you want to sort the students on the class roster:

Last Name, First Name: Select to sort the students on the class roster by last name, then first name.

Start Date, Last, First Name: Select this option to sort students in an Open Entry/Exit (OEE) class based on the student's class start date.

Viewing Enrollment Request History

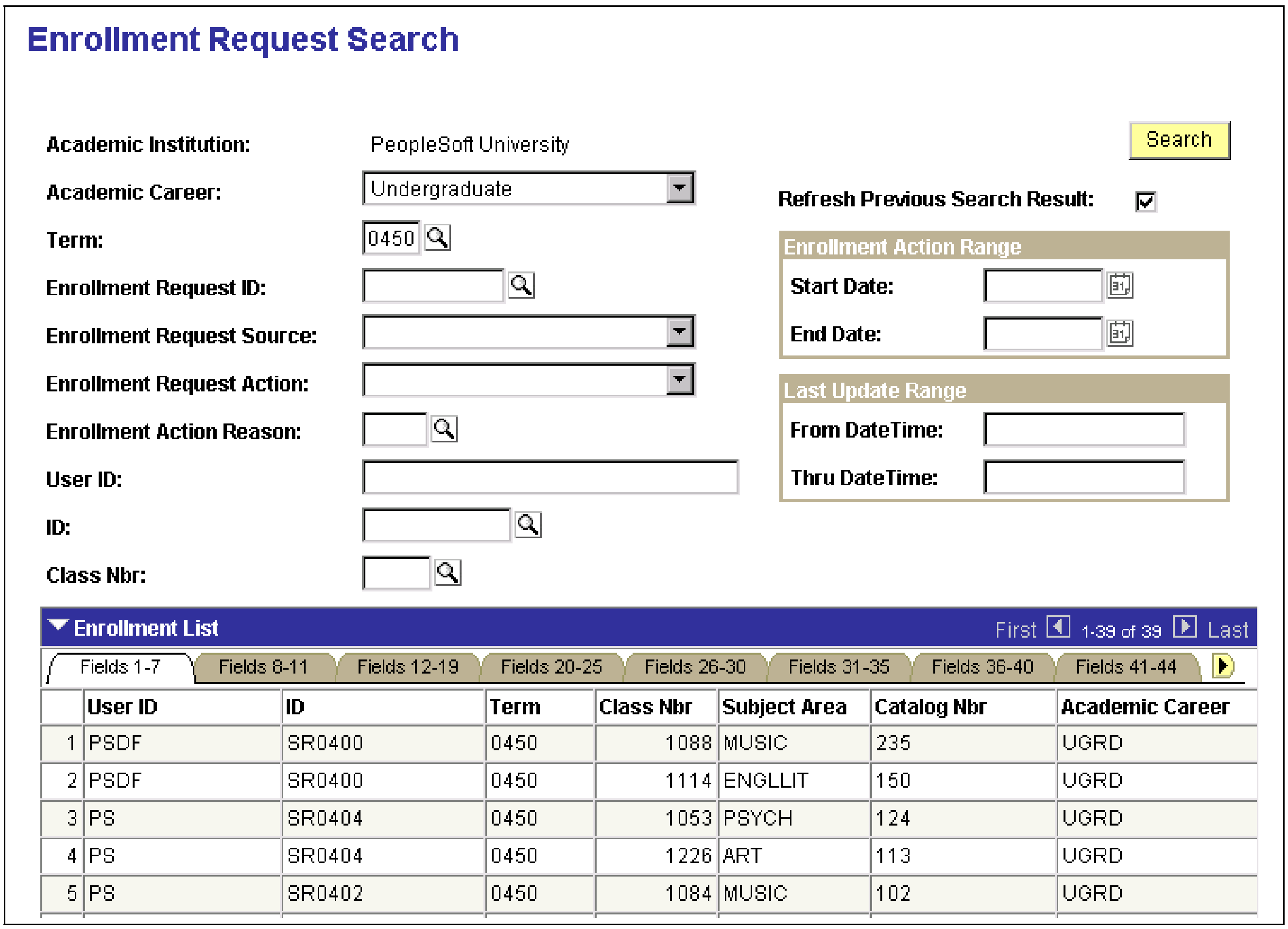
This section discusses how to search for and view enrollment request history.

Page Used to View Enrollment Request History

Page Name	Object Name	Navigation	Usage
Enrollment Request Search	ENRL_REQ1_INQUIRY	Manage Student Records, Manage Academic Records, Inquire, Enrollment Request	Search for and view enrollment request history.

Searching for and Viewing Enrollment Requests

Access the Enrollment Request Search page.



Enrollment Request Search page

The enrollment engine keeps a history of all enrollment requests that it processes successfully. The system queries against these transactions as well as any enrollment transactions posted through the Grade Roster component, displaying in a grid at the bottom of this page all of the enrollment request transactions that meet your search criteria. You must enter at least two search criteria. For example, you can search to find out how a student got dropped from a class, or you can view a list of students enrolled in class that has been cancelled.

Warning! Access to this inquiry component should be restricted to key individuals in the institution because sensitive student information, such as course grades, is visible in this component.

Academic Career	Select the academic career for which you want to search for enrollment transaction history.
Term	Select the term for which you want to search for enrollment transaction history.
Enrollment Request ID	Select the enrollment request ID for which you want to search for enrollment transaction history.
Enrollment Request Source	Select the enrollment request source for which you want to search for enrollment transaction history. The enrollment request source is the process that generated the enrollment request.
Enrollment Request Action	Select the enrollment request action for which you want to search for enrollment transaction history.
Enrollment Action Reason	Select the enrollment action reason for which you want to search for enrollment transaction history.
User ID	Enter the user ID of the person who processed the enrollment transactions that you want to view.
ID	Select the ID of the student whose enrollment transactions you want to view. The system prompts you with IDs from the personal data table (PERSONAL_DATA).
Class Nbr (class number)	Select the class for which you want to view enrollment transactions within a term. To use this field, you must also specify a term in the Term field so that the system knows which term's schedule of classes is valid.
Enrollment Action Range	Use the Start Date and End Date fields in this group box to specify the date range for the enrollment action. For example, specify that the system search for all enrollment requests where students dropped from a class through the Mass Enrollment component due to a canceled class during the fall quarter.
Last Update Range	Use the From Date Time and To Date Time fields in this group box to enter a time range where enrollment requests were last updated.
Refresh Previous Search Result	Select this check box to have the system populate the Enrollment List grid at the bottom of this page with only the latest search results, clearing previous data from the list.
Search	Click to have the system query the enrollment tables and retrieve enrollment transaction history based on your search criteria. The system displays your search results in the Enrollment List grid at the bottom of the page.
Enrollment List	The system populates the grid in the lower portion of the page with each enrollment request transaction that matches your search criteria. Each row contains 46 fields of pertinent information about the enrollment request, dispersed over eight tabs. Click the tabs to view additional fields.

Viewing Student Statistics

PeopleSoft Student Records enables you to view summary information at various points during a student's academic career, with numerous ways to access the information. This section reviews the places in the system where you can view summaries of both enrollment and term statistics.

This section discusses how to:

- View student enrollment summaries.
- View term statistics for a single term.
- View term statistics for multiple terms.
- View cumulative statistics for multiple terms.
- View student terms.

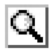
Pages Used to View Student Statistics

Page Name	Object Name	Navigation	Usage
Enrollment Summary	STDNT_ENRL_INQ	Manage Student Records, Manage Academic Records, Inquire, Enrollment Summary, Enrollment Summary	View a summary of a student's enrollment information. The student must first enroll in classes.
Term Statistics	TERM_STATISTICS2	Manage Student Records, Manage Academic Records, Inquire, Enrollment Summary, Term Statistics Manage Student Records, Manage Academic Records, Inquire, Student Grades, Term Statistics	View a student's term statistics within a specified term. The student must first enroll in classes.
Term Statistics	TERM_STATISTICS	Manage Student Records, Manage Academic Records, Use, Term History, Term Statistics	View all of a student's term statistics for each term of the student's academic career. The student must first enroll in classes.
Cumulative Statistics	CUM_STATISTICS	Manage Student Records, Manage Academic Records, Use, Term History, Cumulative Statistics	View all of a student's cumulative statistics for each term of the student's academic career. The student must first enroll in classes.
Student Term Search	STDNT_TERM_SRCH	Manage Student Records, Manage Academic Records, Inquire, Student Term Search	View all terms in which a student has been active.

Viewing Student Enrollment Summaries

Access the Enrollment Summary page.

All classes in which a student is successfully enrolled for a term appear.

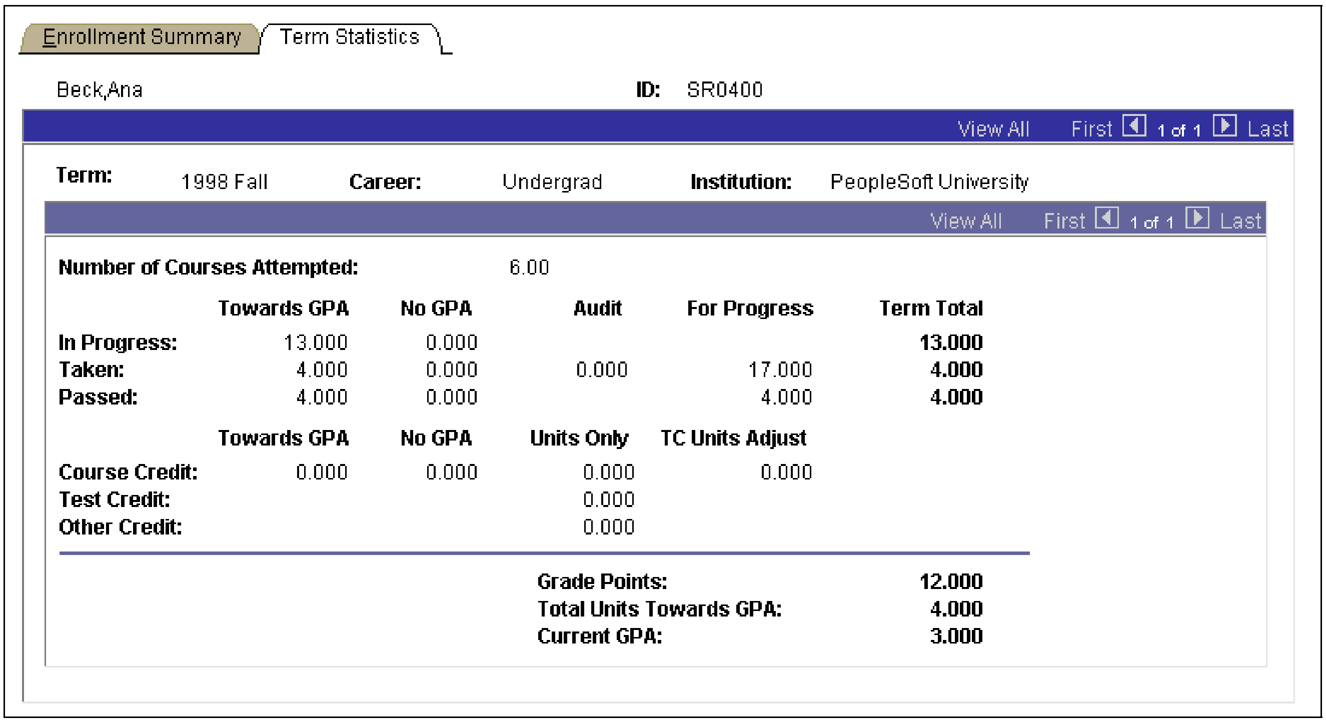
	Click the Enter Search Criteria button to access the Class Detail page, where you can view detail about the class on the enrollment summary.
Print Study List	Click to print the student's enrollment summary.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Self-Service Enrollment Transactions, page 550

Viewing Term Statistics for a Single Term

Access the Term Statistics page.


Enrollment Summary | Term Statistics

Beck,Ana ID: SR0400

View All First 1 of 1 Last

Term: 1998 Fall Career: Undergrad Institution: PeopleSoft University

View All First 1 of 1 Last

Number of Courses Attempted: 6.00

	Towards GPA	No GPA	Audit	For Progress	Term Total
In Progress:	13.000	0.000			13.000
Taken:	4.000	0.000	0.000	17.000	4.000
Passed:	4.000	0.000		4.000	4.000

	Towards GPA	No GPA	Units Only	TC Units Adjust
Course Credit:	0.000	0.000	0.000	0.000
Test Credit:			0.000	
Other Credit:			0.000	

Grade Points: 12.000
Total Units Towards GPA: 4.000
Current GPA: 3.000

Term Statistics inquiry page

The system displays units earned from the home institution in the top half of the page, while transfer credit units appear in the bottom half. In addition, the current grade point average (GPA) appears at the bottom of the page. You can verify the GPA by dividing the grade points by the total units towards GPA.

Towards GPA	Represents the units taken for a grade that accumulate in the GPA.
No GPA	Represents units taken for a grade that do not accumulate in the GPA (for example, *Pass* or *Credit*)
Audit	Represents classes taken at the home institution using the audit grading basis.
For Progress	Represents the total number of units taken *for progress* and is used in PeopleSoft Student Records to determine academic load and, once grading has occurred, academic level.
Term Total	Represents the term total units for each row.

Units Only	Represents units that are transferred from an external organization.
TC Units Adjust (transfer credit units adjustment)	Shows how many units were manually removed from the student's overall transfer credit units. This field is updated on the Terms in Residence page in the Term Activation component.

Viewing Term Statistics for Multiple Terms

Access the Term Statistics page.

See Also

Chapter 27, "Viewing Class Enrollment Data," Viewing Term Statistics for a Single Term, page 599

Viewing Cumulative Statistics for Multiple Terms

Access the Cumulative Statistics page.

Reset Cum Stats at Term Start (reset cumulative statistics at term start)	Select to reset statistics to zero at the start of the term. If you clear this check box, the system accumulates statistics from previous terms.

See Also

Chapter 27, "Viewing Class Enrollment Data," Viewing Term Statistics for a Single Term, page 599

Viewing Student Terms

Access the Student Term Search page.

Academic Career	Every academic career for which the student has been active for a term.
Term	Every term in which the student has been active.
Academic Institution	The academic institution at which the student has been term active.
Eligible To Enroll	The student's eligibility to enroll in the specified academic career and term at an academic institution, according to the value of the corresponding field on the Term Activation page.

Viewing Student Study Lists

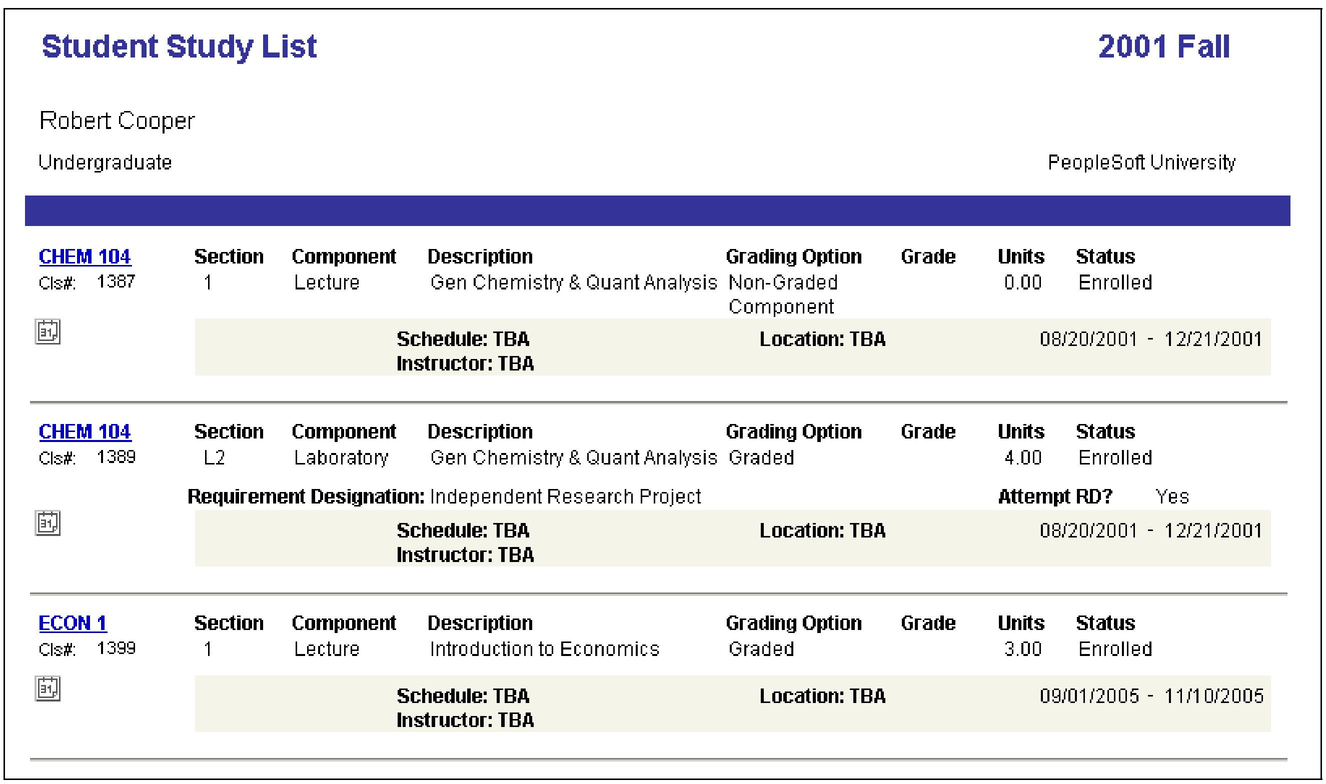
This section discusses how to view a student's class schedule for a term.

Page Used to View Student Study Lists

Page Name	Object Name	Navigation	Usage
Student Study List/View My Class Schedule	SS_ES_STUDY_LIST	• Manage Student Records, Manage Academic Records, click the Study List link from various class enrollment pages • SA Self Service, Learner Services, Academics, Enroll in a Class, Ss Es Study List • SA Self Service, Learner Services, Academics, View My Class Schedule, Class Schedule	View a student's class schedule for a term.

Viewing a Student's Class Schedule

Access the Student Study List/View My Class Schedule page.



Student Study List page

Class Description (subject/catalog number link)

Click the subject/catalog number link to access the Class Detail page, where you can view more details about a class on a student's class schedule.

Click the Academic Calendar button to access the View My Calendar - Academic Calendar page, where you can view drop, cancel, and withdrawal deadlines and definitions.

Cancel Click to return to the previous application page.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Self-Service Enrollment Transactions, page 550

Selecting a Term in Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services or PeopleSoft Learning Management applications, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section discusses how self-service users select a term to view enrollment appointments, class schedule, or grades through self-service.

Page Used to Select a Term in Self-Service

Page Name	Object Name	Navigation	Usage
Select Term	SS_TERMS_LIST	• SA Self Service, Learner Services, Academics, View Enrollment Appointment • SA Self Service, Learner Services, Academics, View My Class Schedule • SA Self Service, Learner Services, Academics, View My Grades • SA Self Service, Learning Management, New/Drop-In Advisees	Students and advisors can select the term within the academic career and institution for which they want to view one's enrollment appointments, class schedule, or grades. The system displays the terms in which a student is active.

Viewing Student Class Schedules Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

Students can use the View My Class Schedule self-service pages to view personal study lists for terms in which they are active. These pages are the following: Select Term, Enrollment - View My Class Schedule, Class Details, View My Schedule - Academic Calendar, and Class Meeting Details.

Viewing Student Exam Schedules Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section discusses how students can use the View My Exam Schedule self-service component to view the scheduled exams for classes in which they are enrolled.

Pages Used to View Student Exam Schedules Through Self-Service

Page Name	Object Name	Navigation	Usage
Exam Schedule - Select Term	SS_EXAM_SCHD_TERMS	SA Self Service, Learner Services, Academics, View My Exam Schedule	Students can select the term for which they want to view the scheduled exams for the classes in which they are enrolled. The system displays the terms in which students are active and enrolled in classes.
Exam Schedule - View Details	SS_EXAM_SCHED	SA Self Service, Learner Services, Academics, View My Exam Schedule	Students can view their schedule of exams for all of their classes in the selected term.

Viewing Class Rosters

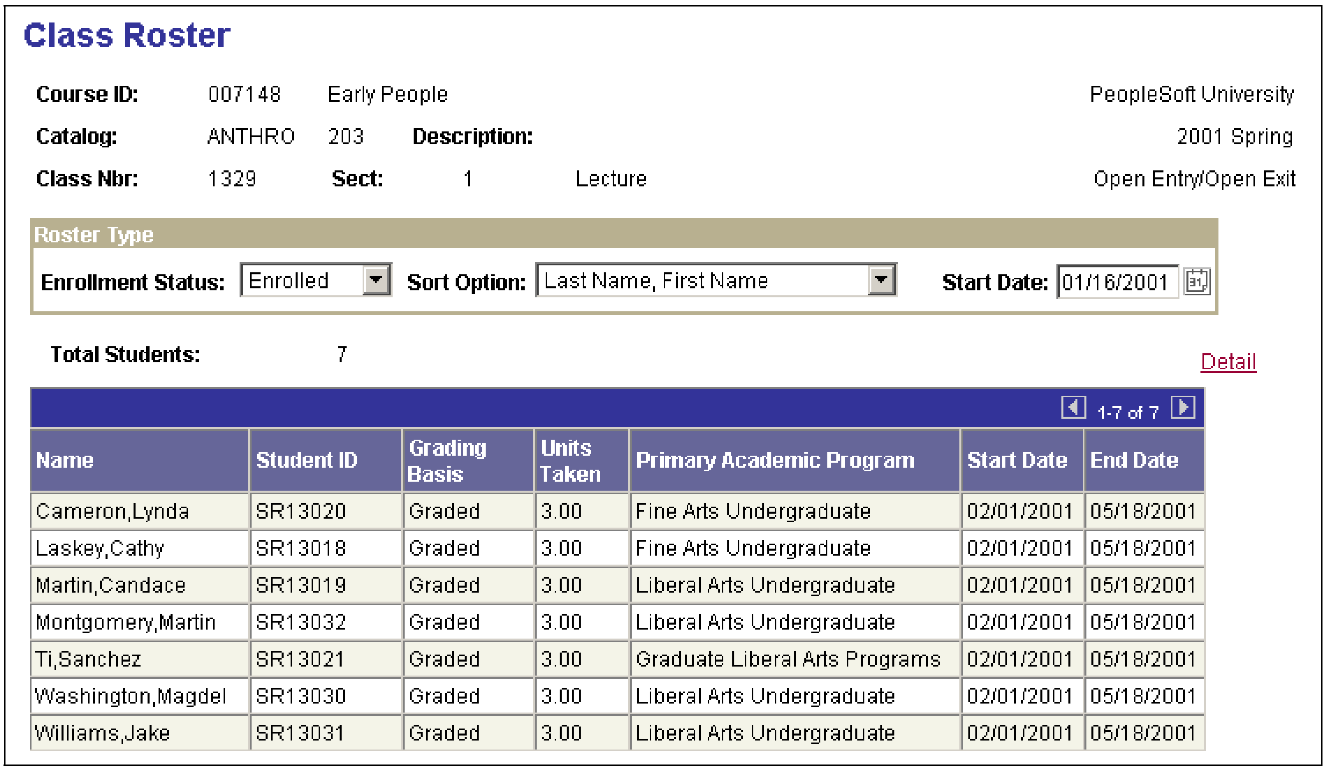
This section discusses how to view class rosters.

Page Used to View Class Rosters

Page Name	Object Name	Navigation	Usage
Class Roster	CLASS_ROSTER	Manage Student Records, Establish Courses, Inquire, Class Roster, Class Roster	View the students that are enrolled in a class, have dropped a class, or are on the wait list for a class.

Viewing Class Rosters

Access the Class Roster inquiry page.



Class Roster

Course ID: 007148 Early People — PeopleSoft University

Catalog: ANTHRO 203 Description: — 2001 Spring

Class Nbr: 1329 Sect: 1 Lecture — Open Entry/Open Exit

Roster Type

Enrollment Status: Enrolled Sort Option: Last Name, First Name Start Date: 01/16/2001

Total Students: 7 Detail

1-7 of 7

Name	Student ID	Grading Basis	Units Taken	Primary Academic Program	Start Date	End Date
Cameron,Lynda	SR13020	Graded	3.00	Fine Arts Undergraduate	02/01/2001	05/18/2001
Laskey,Cathy	SR13018	Graded	3.00	Fine Arts Undergraduate	02/01/2001	05/18/2001
Martin,Candace	SR13019	Graded	3.00	Liberal Arts Undergraduate	02/01/2001	05/18/2001
Montgomery,Martin	SR13032	Graded	3.00	Liberal Arts Undergraduate	02/01/2001	05/18/2001
Ti,Sanchez	SR13021	Graded	3.00	Graduate Liberal Arts Programs	02/01/2001	05/18/2001
Washington,Magdel	SR13030	Graded	3.00	Liberal Arts Undergraduate	02/01/2001	05/18/2001
Williams,Jake	SR13031	Graded	3.00	Liberal Arts Undergraduate	02/01/2001	05/18/2001

Class Roster inquiry page

Enrollment Status Select a particular student enrollment status that you want to view for the class. The enrollment status defines the Class Roster Type that the system displays for you. Your choices for enrollment status are *Enrolled, Dropped,* or *Waiting.*

Start Date Enter a date in this field to filter the list of students on the class roster of an OEE class so that the only remaining students are those whose class start date is on a specific date.

Total Students The total number of students who appear on the class roster.

Detail Click to view the Class Detail page, where you can view detail about the class for which you are viewing the class roster.

Name The name of the student who is either enrolled in, has dropped from, or is on the wait list for the class.

Student ID The ID of the student who is either enrolled in, has dropped from, or is on the wait list for the class.

Grading Basis The grading basis of the student who is either enrolled in, has dropped from, or is on the wait list for the class.

Units Taken The number of units that the student took for the class.

Primary Academic Program The primary academic program of the student who is either enrolled in, has dropped from, or is on the wait list for the class.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Self-Service Enrollment Transactions, page 550

Viewing Class Rosters Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learning Management application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section discusses how faculty can view class section rosters through self-service.

Pages Used to View Class Rosters Through Self-Service

Page Name	Object Name	Navigation	Usage
Access Class Rosters	SS_FAC_TERMS1	SA Self Service, Learning Management, Management, Access Class Rosters, Ss Fac Terms1	Select the term for which you want to view class rosters.
Select Class Roster	SS_FAC_TERMS	SA Self Service, Learning Management, Management, Access Class Rosters, Ss Fac Terms	Select a class section within a term for which you want to view the class roster.
Class Roster	SS_FAC_CLASS_ROST	SA Self Service, Learning Management, Management, Access Class Rosters, Ss Fac Class Rost	View the students who are enrolled in a class, have dropped a class, or are on the wait list for a class.

See Also

Chapter 27, "Viewing Class Enrollment Data," Viewing Class Rosters, page 603

Printing Class Rosters

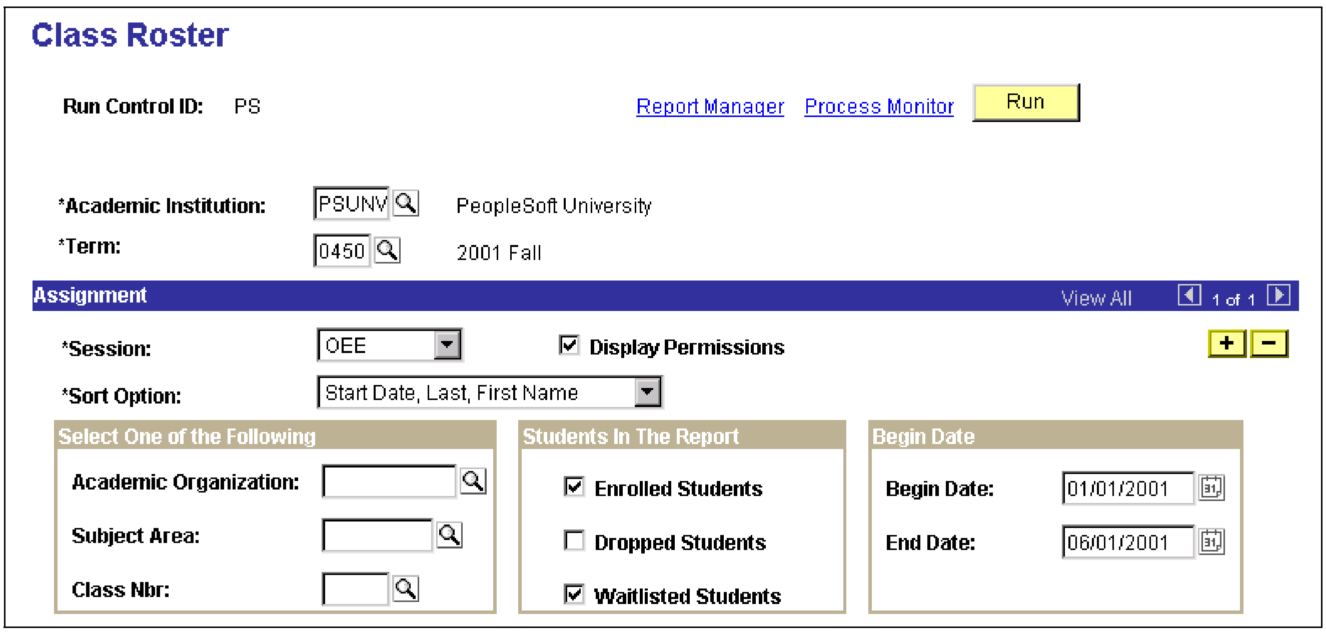
This section discusses how to print class rosters.

Page Used to Print Class Rosters

Page Name	Object Name	Navigation	Usage
Class Roster	RUNCTL_SRCLASSRSTR	Manage Student Records, Establish Courses, Report, Class Roster	Print class rosters.

Printing Class Rosters

Access the Class Roster report page.



Class Roster report page

Academic Institution Select the academic institution for which you want to print class rosters.

Term Select the term for which you want to print class rosters.

Session Select the session that contains the class rosters that you want to print. Values for this field are delivered with your system as translate values. You can modify these values.

Display Permissions Select to display permissions on the printed class roster. If the class section has permissions, the Class Roster report displays the name of the student assigned the permission, date that the student used the permission, and expire date of the permission.

Academic Organization In the Select One of the Following group box, if you want to print class rosters for a specific academic organization, then select a value in this field and leave blank the Subject Area and Class Nbr fields.

Subject Area	In the Select One of the Following group box, if you want to print class rosters for a specific subject area, then select a value in this field and leave blank the Academic Organization and Class Nbr fields.
Class Nbr (class number)	In the Select One of the Following group box, if you want to print class rosters for a specific class, then select a value in this field and leave blank the Subject Area and Class Nbr fields. You are prompted by the schedule of classes for the specified term.
Enrolled Students	Select this check box to include in the class roster the students who are enrolled in the class.
Dropped Students	Select to include in the class roster the students who have dropped the class.
Wait-Listed Students	Select to include in the class roster the students who are on the wait list for enrollment into the class.
Begin Date	Enter a date to filter the list of students on a class roster of an OEE class so that the only remaining students are those whose class start date is on or after the specified date.
End Date	Enter a date in this field to filter the list of students on a class roster of an OEE class so that the only remaining students are those whose class start date is on or before the specified date.

Run the Class Roster Structured Query Report (SQR) process as needed.

Producing Student Study Lists

A student study list is a list of classes in which a student is enrolled for a term.

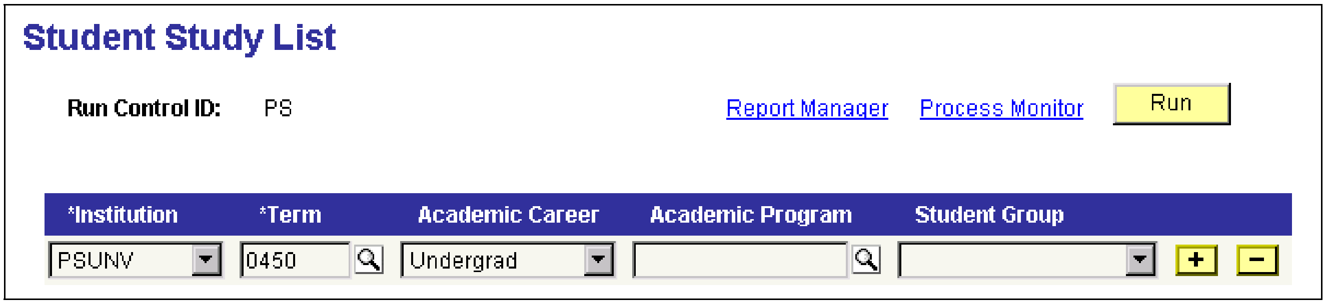
This section discusses how to generate student study lists.

Page Used to Produce Student Study Lists

Page Name	Object Name	Navigation	Usage
Student Study List	RUNCTL_SRSTDYLST	Manage Student Records, Manage Academic Records, Report, Student Study List	Generate student study lists.

Generating Student Study Lists

Access the Student Study List page.



Student Study List page

Institution Select the academic institution for which you want to produce student study lists.

Term Select the term for which you want to produce student study lists.

Academic Career If you want to narrow the production of student study lists to a specific academic career, select a value.

Academic Program If you want to narrow the production of student study lists to a specific academic program, select a value. The Student Group field becomes unavailable for edit.

Student Group If you want to narrow the production of student study lists to a specific student group, select a value. The Academic Program field becomes unavailable for edit.

First run the Student Class Schedule Report SQR process (SRSTDLST), then the Study List Crystal report. Run the PSJob only if you are running the process on a server.

CHAPTER 28

Managing Enrollment Verifications

This chapter discusses how to:

- Produce enrollment verification reports.
- Request enrollment verification through self-service.

Producing Enrollment Verification Reports

The Enrollment Verification feature enables you to produce enrollment verification reports for students. You can produce these reports for individual students on-demand or through a batch process using PeopleSoft Process Scheduler. This feature also enables you track the production of enrollment verifications for individual students, enter enrollment verification requests for future dates, and prevent production of enrollment verifications for students with specific service indicators.

This section discusses how to:

- Restrict service indicators from enrollment verification.
- Enter enrollment verification requests.
- Enter recipient address for enrollment verifications.
- Add notes to enrollment verifications.
- Process enrollment verifications in batch.

Pages Used to Produce Enrollment Verification Reports

Page Name	Object Name	Navigation	Usage
Enrollment Verification Req (enrollment verification request)	ENRL_VER_REQUEST	Manage Student Records, Manage Academic Records, Inquire, Enrollment Verification Req, Enrollment Verification Req	Enter the content of a student's enrollment verification request. Also view the history of a student's enrollment verification requests.
Address	ENRL_VER_REQUEST_2	Manage Student Records, Manage Academic Records, Inquire, Enrollment Verification Req, Address	Enter the destination address of the enrollment verification and the number of copies to be sent. Direct each request to multiple recipients and addresses. For each recipient, either enter a free-form address or select existing address information already stored in the system.
Notes	ENRL_VER_REQUEST_3	Manage Student Records, Manage Academic Records, Inquire, Enrollment Verification Req, Notes	Add an optional free-form message to be included on the student's printed enrollment verification report. The message can be unique to each recipient of the report.
Enrollment Verification Print	RUNCTL_ENRL_VER	Manage Student Records, Manage Academic Records, Process, Enrollment Verification Print	Process and print enrollment verification reports for students in batch based on the academic institution, request date, and whether the report has been previously printed.

Restricting Service Indicators From Enrollment Verification

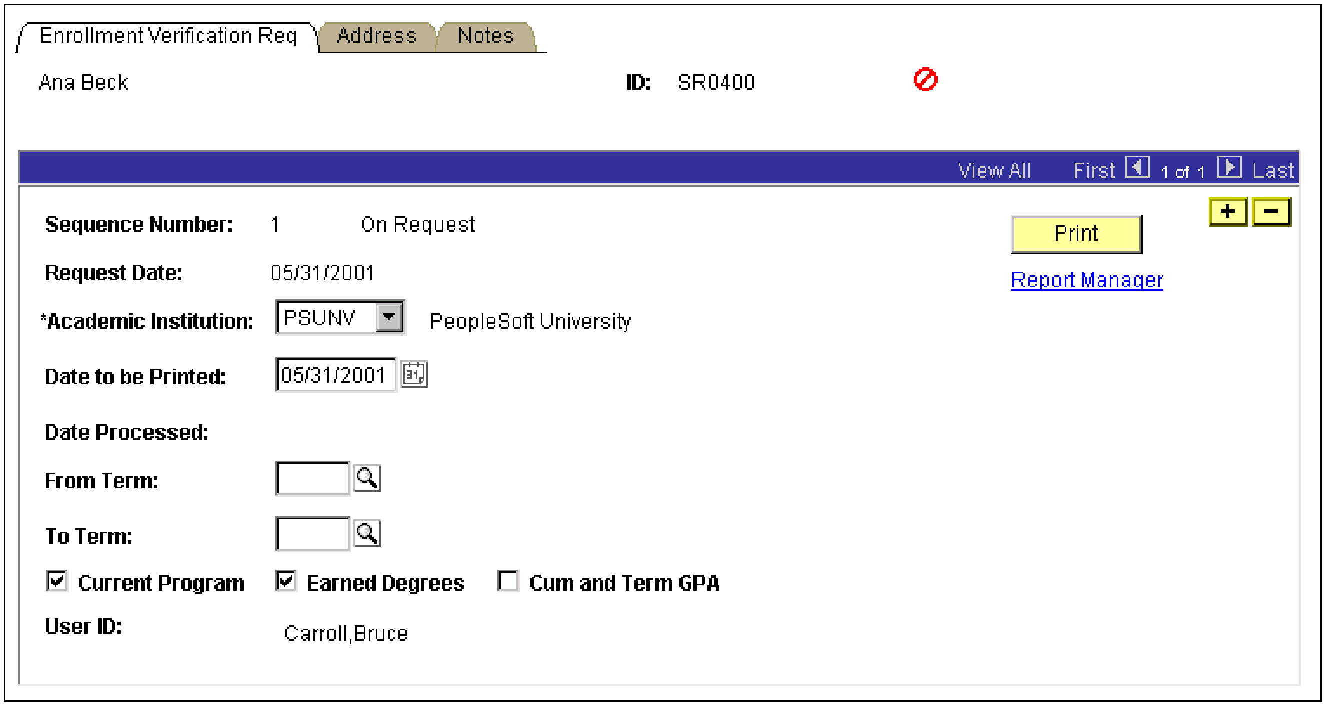
Similar to academic transcripts, you can set up the system to hold the processing of enrollment verification requests when students have certain negative service indicators. In order for the enrollment verification processes to hold these students' requests, you must first associate the delivered service impact ENVER with a service indicator.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Services Data"

Entering Enrollment Verification Requests

Access the Enrollment Verification Req page.



Enrollment Verification Req (request) page

For each request, you can process and print it immediately, process and print it in batch with other requests for a range of days, or hold it for batch processing and printing on a future date. The page displays the student's requests in descending order according to the sequence number of each request, the most recent request appearing on top.

Sequence Number	The number assigned to each request that has been entered for the student.
Request Date	The date on which the request was entered into the system. If you are entering a new request, the system defaults this date to today's date.
Academic Institution	Select the academic institution for which you want to print the request. The system defaults to the academic institution defined for you on the User Defaults component.
Date to be Printed	The system defaults to today's date the date this request is to be printed. If you want to print the request on a future date through the batch enrollment verification process (COBOL program SRPCENVB), select a new date. The enrollment verification process won't print the request until the system date matches this date and the date range of your batch request includes this date.
Date Processed	If the request has already been processed, the system displays the date the processing occurred.
From Term	To report all terms for which the student has enrollment history, leave this field blank. To print an enrollment verification report for a single term, select the term. To print an enrollment verification report for a range of terms, select the beginning term in the range. The system defaults the value you select to the To Term field.

To Term This field value defaults from the From Term field value. If you want to print an enrollment verification report for a range of terms, select the latest term in the range.

Current Program Select to include the student's current academic career, academic program, academic plan, and academic sub-plan in the printed report. The system selects this option for you by default.

Note. To print the student's current program, academic plan, and academic sub-plan, the Transcript Level field on the Academic Program 2 page, Academic Plan Table page, and Academic Sub-Plan Table page (respectively) must be set to a value other than *Not Print.*

Earned Degrees Select to include the student's earned degrees in the printed report. The enrollment verification process prints degrees in degree sequence number order and their associated degree plans in plan sequence number order. If you select this option and the student has no earned degrees, the process excludes this section of information from the printed report.

Cum and Term GPA (cumulative and term grade point average) Select to include the student's GPA by term and cumulative GPA by academic career on the printed report.

Note. To print the student's cumulative GPA by academic career on the request, you must *also* select the Current Program option.

User ID If the request has already been processed, then for tracking purposes, the system displays the user ID of the person who entered the request.

Status (not labeled) The current status of the request, either *On Request* or *Completed.*

Print Click this button to process the request immediately and send the report directly to your default printer. All of the student's academic careers appear on the same report, listed separately by term. The COBOL program SRPCENVR extracts the student data from the STDNT_CAR_TERM table for all academic careers and applicable terms. Once complete, the process updates the request Status field to *Completed.*

Also click this button to reprint a request. The system keeps no record of reprinted enrollment verifications. If the student has no enrollment history based on the request parameters, the system prints a report with the enrollment history header and the message *Enrollment History Unavailable.*

If the student has a service indicator with an attached service impact of ENVER, the system displays the Service Indicator page, indicating that enrollment verification has been prevented due to negative service indicators.

Technical Information

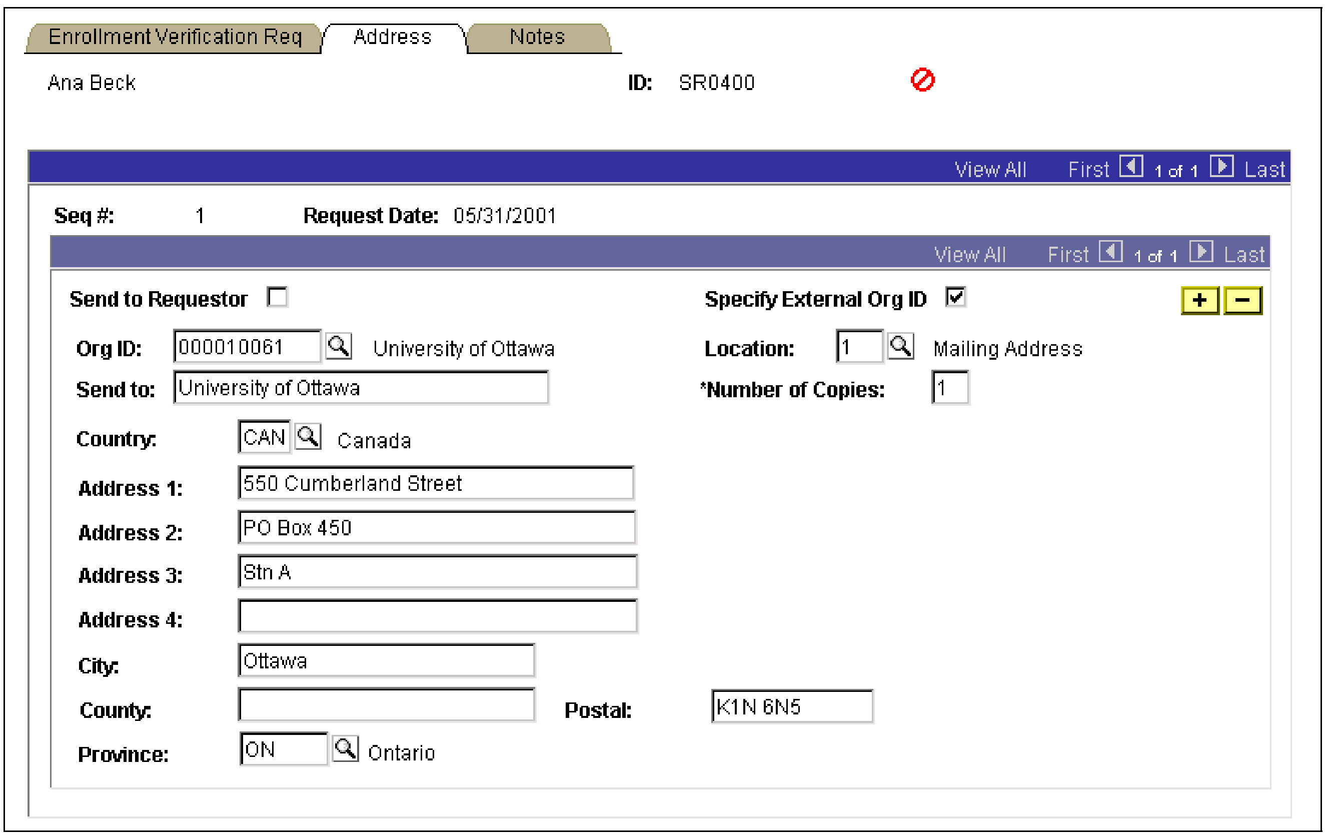
The COBOL program SRPCENVR writes data to two tables, and this data gets printed by Crystal on report SR802---.rpt. One table holds the header data and another table holds the detail data. The COBOL process first outputs the header records—one for each request detail and copy requested. For example, if three copies are requested for address A, three header records are produced with address A. The COBOL process then produces the detail records one time for the whole request. The two tables are joined using the query tool and Crystal, producing the right number of copies for each requested address. You can alter the enrollment verification headers by modifying the SRCCENVR Program ID on the Strings Table page (PeopleTools, Utilities, Use Strings Table).

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Defining Programs, Plans, and Subplans”

Entering Recipient Addresses for Enrollment Verifications

Access the Address page.



Address inquiry page

Send to Requestor Select to automatically populate the Send To field with the requestor’s name and the address fields with the requestor’s home address.

Specify External Org ID Select to be able to choose an existing external organization. The system makes available the Org ID and Location fields for this purpose.

Org ID (organization ID)	This field becomes available when you select the Specify External Org ID check box. Select the organization to which you are sending the enrollment verification request. The field prompts against the Organization Table record. Define external organizations on the Organization Table page. When you tab out of the field, the system automatically populates the Send To field with the organization's name.
Location	This field becomes available when you select the Specify External Org ID option. Select the location code of the organization to which you are sending the enrollment verification request. When you tab out of the field, the system automatically populates the address fields with the location address.
Send to	Enter the name of the recipient to whom you are sending the enrollment verification report. If you select either the Send to Requestor check box or the Specify External Org ID check box, then this value populates automatically according to your selection; however, you can overwrite it. You can also enter multiple recipients.
Number of Copies	Enter the number of enrollment verification reports that you want to produce and send to this recipient and address.
Country	Select the country of the recipient's address. When you tab out of this field, the system displays the address format associated with that country. Enter all of the necessary address information in the address fields that appear. If you select either the Send to Requestor check box or the Specify External Org ID check box, then these fields populate automatically according to your selection. When you process and print the report, either through the Print button on the Enrollment Verification Req page or through the batch process, the address prints so that it appears properly through the window of a #10 envelope.

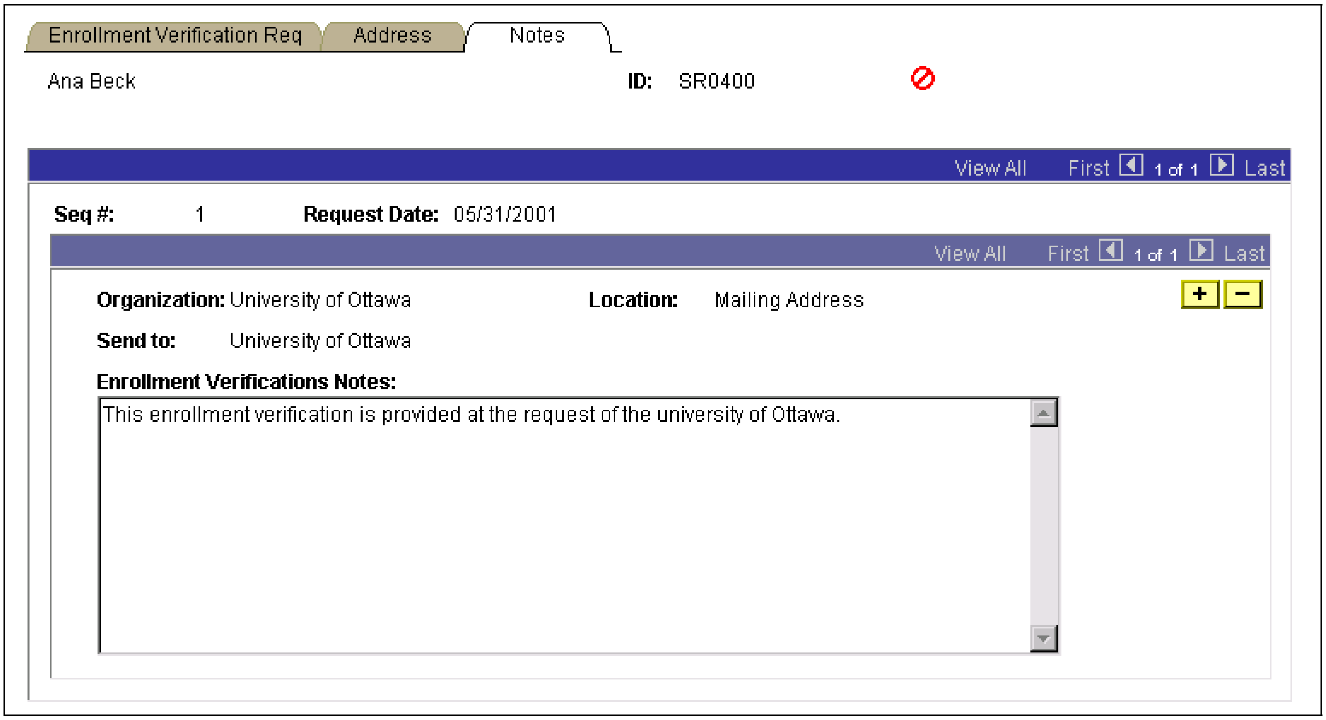
See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Adding Organizations to Your Database"

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Organization Data," Entering Organization Location Data

Adding Notes to Enrollment Verifications

Access the Notes page.



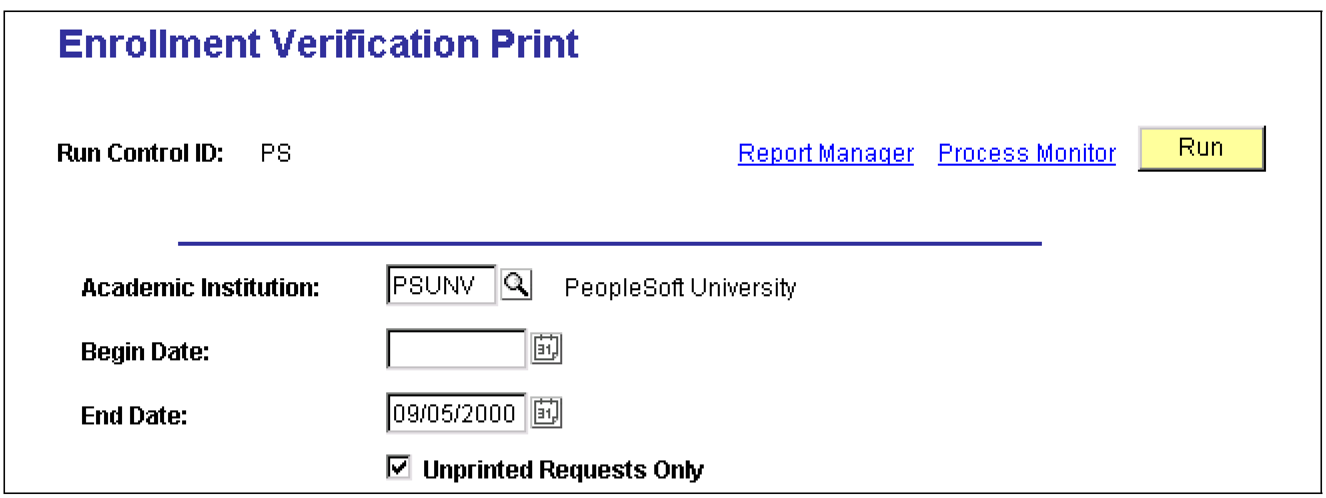
Notes page

Send To and **Organization** The system displays the name of the recipient in these fields.

Enrollment Verification Notes If you want to include a message on the enrollment verification report, enter it in this text box.

Processing Enrollment Verifications in Batch

Access the Enrollment Verification Print page.



Enrollment Verification Print page

Academic Institution Select the academic institution for which you want to print enrollment verification reports.

Unprinted Requests Only — Select if you want the process to print only the request records that have a status of *On Request,* as displayed on the Request process page in the Enrollment Verification Req component. The process excludes all previously printed enrollment verification reports. The system selects this check box by default.

Note. If you clear this check box, the process reprints any request with a status of *Completed.* The new report contains all information as of the run date.

Begin Date and **End Date** — In the Request Date group box, select a range of dates to process only the request records entered into the system on or within these dates. By default, the system populates the End Date field with today's date. If you want to print the academic institution's request records for all dates, leave these fields blank.

Note. The process won't print request records where the date to be printed value is set to a future date. It prints these records once the date to be printed is on or before the system date and falls within the date range your request for the batch process.

First run the COBOL process SRPCENVB to populate the results tables. PeopleSoft Process Scheduler runs the process at user-defined intervals. Then run the Crystal report SR803---.rpt to generate the enrollment verification reports from the results tables. Each report prints in alphabetical order by the student's name (last name, first name) and displays data according to the criteria selected on the Enrollment Verification Req component. The process extracts the student data from the STDNT_CAR_TERM table for all academic careers and applicable terms. Once complete, the process updates the request status to *Completed.* Run the PSJob only if you are running the process on a server.

If you have set up negative service indicators with a service impact of ENVER and students have one of these service indicators, the SRCENVB process creates error records for these students. If you want to see the list of students who the process excluded due to negative service indicators, then run the Crystal report SR804---.rpt. The report includes the student's name, ID, request number, and the service indicator that has the service impact ENVER.

Technical Information

The COBOL program SRPCENVB writes data to two tables, and Crystal prints this data. One table holds the header data and another table holds the detail data. The COBOL process first outputs the header records, one for each request detail and copy requested. For example, if three copies are requested for address A, three header records are produced with address A. The COBOL process then produces the detail records one time for the whole request. The two tables are joined using the query tool and Crystal, producing the right number of copies for each requested address.

Requesting Enrollment Verifications Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

This section discusses how students can request and view enrollment verifications through self-service.

Pages Used to Request Enrollment Verifications Through Self-Service

Page Name	Object Name	Navigation	Usage
Request Enrollment Verification	SS_ENRL_VER_REQ	SA Self Service, Learner Services, Academics, Request Enrollment Verification	Request personal enrollment verification.
Request Enrollment Verification	SS_ENRL_VER_RESULT	SA Self Service, Learner Services, Academics, Request Enrollment Verification	View the results of a self-service enrollment verification request.

CHAPTER 29

Processing Transfer Credit

This chapter provides an overview of transfer credit processing and discusses how to:

- Record external course and test information.
- Create student-specific agreements.
- Process course transfer credit.
- Process test transfer credit.
- Process other transfer credit.
- Process transfer credit in batch.
- View and print transfer credit information.
- View transfer credit reports through self-service.
- Evaluate transfer credit through self-service.

Understanding Transfer Credit Processing

This section lists common elements and discusses transfer credit processing.

Common Elements Used in This Chapter

Academic Plan In the Target Information group box, select the academic plan where the transfer credit in this row of the transfer model will articulate. (Optional)

Academic Program In the Target Information group box, select the academic program where the transfer credit in this row of the model will articulate.

Add Comments Click to access the Model Comments page, where you can enter comments about this row of the transfer credit model.

Articulation Term Select the term for which you want to process the individual's transfer credit for this row of the model. Note that it is possible to articulate credits across multiple terms. You would do this, for example, if a student has continually taken credit outside your academic institution and you have posted credit at each point in time.

Calculate When you articulate course and test credit, click this button to calculate the individual's transfer credit statistics according to the accepted transfer credit on the corresponding row of the model. You must save your calculations before you can post the transfer credit.

Comment

Click to access the Model Comments page, where you can enter comments about this row of the transfer credit model.

Credit Source Type

In the Source Information group box, select the type of source from which you will be modeling transfer credit on this row. Your selection instructs the system from which table you will be selecting your Source Institution.

External: The system prompts you with the source IDs of external organizations in your system. The External Org ID (external organization ID) and Data Source fields appear and are available.

Internal: The system prompts you with source IDs of academic institutions in your system. You would select this option, for example, when a student is transferring from one academic career to another within your academic institution. The Source Career and Source Institution fields appear and are available.

Manual: If you intend to create transfer credit models manually, do not use this component. If you select this option, the system displays a message instructing you to use the corresponding manual component.

Data Source

For an external credit source type, select the data source from which the individuals external transfer credit have been entered into the system. The data source that you specify must match the data source on the individual's external education record. Values for this field are delivered with your system as translate values. You can modify these values.

Equivalent Subject / Catlg Nbr (equivalent subject and catalog number)

After you run the Transfer Credit process for a model, the system displays the subject and catalog number of the internal course that is equivalent to the transfer credit that it evaluated. The process determines these values for course transfer credit according to the internal equivalent course specified for the applicable course transfer equivalency rule on the Subject Area Elements page of the Transfer Subject Area component; and for test transfer credit according to the internal equivalent course specified for the applicable test transfer equivalency rule on the Test Credit Rule/Component page.

When processing transfer credit manually, after you enter the equivalent subject and catalog number on the Equivalent Course Information page for this row of the model, the process displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

External Org ID (external organization ID)

For an external credit source type, select the external organization from which the individual is transferring credit. Define external organizations on the External Organization page, but you are prompted here from the education record of the transfer prospect, applicant, or student as defined on the Education component.

Group

The Transfer Credit process automatically groups incoming transfer credit and its internal equivalent courses together on separate rows within the grid at the bottom of the page. The number in this field identifies the group as unique amongst other groups on this row of the transfer credit model. You have the option, once the Transfer Credit process completes the evaluation, to move internal equivalent courses from group to group as needed to alter the articulation model before you post the transfer credit to the individual's record. You can move internal equivalent course from group to group by using the Move To Group button on the grid row of the course to move.

Lock Select to lock the corresponding group row of the transfer credit model. You might select this check box, for example, if you intend to post or unpost transfer credit for that row at a later date. The groups for which you select this check box are excluded from a rerun of the Transfer Credit process. If you rerun the Transfer Credit process and something about the incoming transfer credit has changed (such as grades or units), then the process displays a red letter *Y* in front of that group. The *Y* alerts you that something about that incoming transfer credit changed after the group was locked. You might therefore want to investigate the change before you post or unpost the corresponding transfer credit.

Model Nbr (model number) The system, by default, sets the first row of the transfer credit model to model number *1.* The system uses this number to store multiple, unique transfer credit models.

Model Status The system displays the status of the model on the first page and subsequent page of the component.

Submitted: Indicates that you have run the transfer credit articulation process for this model.

Posted: Indicates that you clicked the Post button on the second page of the component and the system has successfully transferred the articulated transfer credit to the student's career term record (STDNT_CAR_TERM table) for this model.

Completed: Indicates that you have modeled and articulated the student's transfer credit, but that the model could not be posted to the student's career term record because the student is not currently active in either the academic program or articulation term that you have selected for the model.

Once the student is activated into the academic program and articulation term that you have selected, click the Copy TC Units button on the Terms in Residence page. This will automatically update the model status to Posted and write the data to the STDNT_CAR_TERM table.

Post Click to post an individual's transfer credit for the corresponding model. Posting automatically saves the page. Once you post transfer credit, the system displays the posted transfer credit statistics according to the individual's calculated transfer credit statistics on the page. Posting a transfer credit model also updates the status of the model from *Submitted* to *Posted* or *Completed.* When you post your transfer credit model, the fields in the Target Information group box on the first page of the component become unavailable. To update target information, you must first unpost your model.

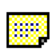
Seq # (sequence number)	For transfer credit in which you manually define equivalencies, the system automatically assigns a sequential number to each incoming row of transfer credit to identify unique rows in the table. These sequence numbers have no programming significance.
Source Career	For an internal credit source type, select the academic career from which the student is transferring credit.
Source Institution	For an internal credit source type, select the internal academic institution from which the student is transferring credit.
Status	After you run the Transfer Credit process for this row of the model, the process displays the transfer status of each transfer credit that it evaluated. Possible statuses are *Accepted, Rejected, No Rule,* and *Contingent.*
Study Agreements	Click to access the Student Agreements page, where you can view the details of this student's study agreement.
Total Units - Articulation Term	When you articulate test and other credits, the system calculates the individual's total transfer credit units according to the articulation term and incoming transfer credit on the corresponding of the model.
Total Units - Posted Model	When you articulate test and other credits, use this field to view a summary of the credits that have been transferred to the student's record through this model. You can view changes in this field only after you have posted or unposted the model and saved the transaction. The system displays values for this field in relation to the corresponding value in the Total Units - Articulation Term field that you have calculated for the model.
Transcript Level	Select a transcript level to determine the types of transcripts on which the system will include the transfer credit that articulates through this row of the model, provided that the is posted to the individual's record. Your choices in are*: Not Print, Official, Unofficial, Stdnt Life* (student life), *Degr Prog* (degree progress).
Transfer Status	After you run the Transfer Credit process for this row of the model, the process displays the transfer status of each transfer credit that it evaluated. Possible statuses are *Accepted, Rejected, No Rule,* and *Contingent.*
Unpost	Click to completely remove the transfer credit posted through this model from the student's career term record. View the results for the student on the Term Statistics page.
	Click the Transfer Status Detail button to access the Transfer Rule Applied page or the Reject Reason page, where you can either view the transfer equivalency rule that the Transfer Credit process applied to the corresponding external course, or, if the transfer credit is rejected, view the reject reason. This field applies only to transfer credit processing with predefined course and test equivalency rules.
	Click the Edit Equivalent Course button to access the Equivalent Course Information page, where you can edit equivalent course information prior to posting transfer credit.

Click the Reject External Course button to reject incoming courses before you post transfer credit. Only the incoming course on the corresponding row will be rejected. For example, if incoming Math 100 and Math 200 are equivalent to internal Math 104, and you click the reject button on the Math 100 line, the resulting rule will be that Math 200 is equivalent to Math 104.

Click the Add Internal Equivalent button to access the Equivalent Course Information page, where you can add internal equivalent course information.

Click the Delete Internal Equivalent button to delete internal equivalent courses for the corresponding group row. This button appears only if there are multiple internal equivalent courses for that row.

Click the Move to Group button to open a field on the page for another group number. Use this field to move transfer credit from one group into another group. For example, let's say that a group has a transfer status of *Rejected.* You can use this feature to move the transfer credit to another group that has a transfer status of *Accepted* to ensure that the transfer credit gets posted.



Click the Comment/Override Reason button to access the Course Credit Comments, Test Credit Comments, or Other Credit Comments pages, where you can add an override reason and comment about any adjustments you made to a group row of a transfer credit model.

See Also

Chapter 29, "Processing Transfer Credit," Viewing Student Study Agreements, page 639

Chapter 13, "Setting Up Transcripts," Defining Transcript Types, page 264

Transfer Credit Processing

Once you have set up your predefined transfer rules for courses and tests, you are ready to start processing transfer credit. The Transfer Credit process includes retrieving all external transfer credit information; evaluating these external courses, tests, and other credit; then posting the transfer credit. PeopleSoft provides features to enable transfer credit processing by the following methods:

- Using predefined rules.
- Using student-specific agreements.
- Creating manual rules to assign course, test, and other credit.

Our processing design is based on modeling, so you can give individuals options for articulation that are dependent on the academic program or academic plan selected for them.

You can command the system to evaluate transfer credit by using the predefined transfer equivalency rules that you have created and then attached to academic programs and plans. Or you can process transfer credit by creating models manually as you go through processing. For course transfer credit, you can also use student-specific study agreements in conjunction with these predefined course transfer equivalency rules. Whether you are using predefined or manual rules or processing transfer credit manually, the functionality is the same. However, to maximize the use of your time, use only the manual Transfer Credit process to transfer credit for schools from which you rarely receive students.

There are some general concepts to understand before you begin processing transfer credit, regardless of which type of transfer credit and method you use. The Transfer Credit process enables you to model as many articulation scenarios for a prospect, applicant, or student as you want. You select the rule for your model (either predefined or manual), command the system to evaluate the scenario on the basis of that rule, revise the results if you want, and save the model or post the credits.

Once you have posted credits, the system updates the individual's record. The same is true when you unpost an articulation model—once you have unposted credits, the system updates the individual's academic record. The system removes all the credits that were posted.

Another concept is the grouping of transfer credit. Incoming transfer credit and its internal equivalents are grouped together. PeopleSoft refers to these as *groups.* You have the option, once the Transfer Credit process completes the evaluation, to move internal equivalent courses from group to group as needed to alter the articulation before you post the transfer credit to the individual's record. Other features include many buttons that enable you to accept, reject, add, and discard courses from the group. You can also revise details, such as units and grade.

Note. A person does not have to be active in an academic program or academic plan to *create* model-transfer-credit scenarios. However, the student must be active to *post* transfer credit.

See Also

Chapter 7, "Setting Up Transfer Credit Processing," page 157

Recording External Course and Test Information

The first step in processing transfer credit for courses and tests is receiving external course and test information. You enter external course information for individuals in the Education component and external test information in the Test Results component.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Tracking External Education Information"

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants

Creating Student Specific Agreements

Student-specific agreements are generally made prior to the student enrolling at your academic institution. There are times, however, when your course transfer equivalency rules do not satisfy a specific student's situation, or an advisor wants to make a unique transfer agreement with a student.

This section discusses how to:

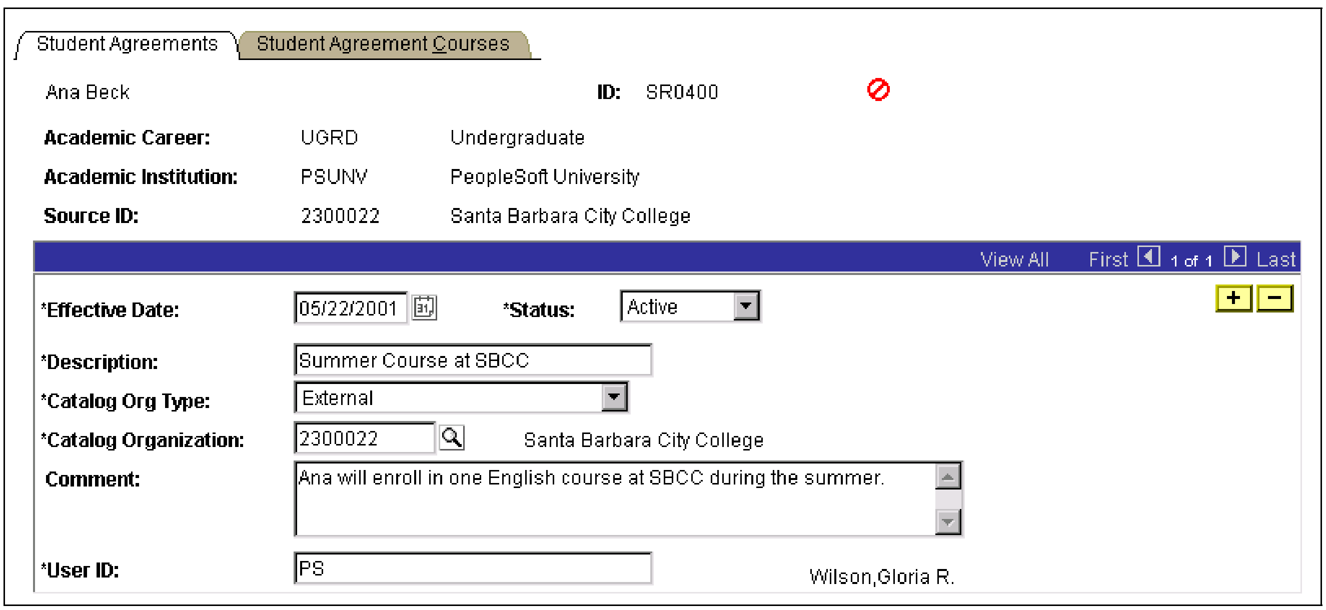
- Describe student agreements.
- Enter student agreement details.

Pages Used to Create Student Specific Agreements

Page Name	Object Name	Navigation	Usage
Student Agreements	STDNT_AGRMNT	Manage Student Records, Process Transfer Credit, Use, Student Agreements, Student Agreements	Describe specific student agreements, and enter the catalog organization and comments.
Student Agreement Courses	STDNT_AGRMNT_CRSE	Manage Student Records, Process Transfer Credit, Use, Student Agreements, Student Agreement Courses	Enter the external courses and equivalent internal courses of specific study agreements. These study agreement equivalency rules are separate from the course transfer equivalency rules that you might have created and attached to academic programs and plans.

Describing Student Agreements

Access the Student Agreements page.



Student Agreements page

Catalog Org Type (catalog organization type)

The information in this field designates the table from which you will select a catalog organization for the external courses of the study agreement.

External: The system will prompt you with external organizations in your system.

Internal: The system will prompt you with academic institutions in your system.

Catalog Organization

Select the catalog organization for the external courses of this study agreement. The system prompts you with values based on your selection in the Catalog Org Type field. When defining course equivalencies for this study agreement on the Study Agreement Courses page, the system will prompt you with courses based on the catalog organization that you select here.

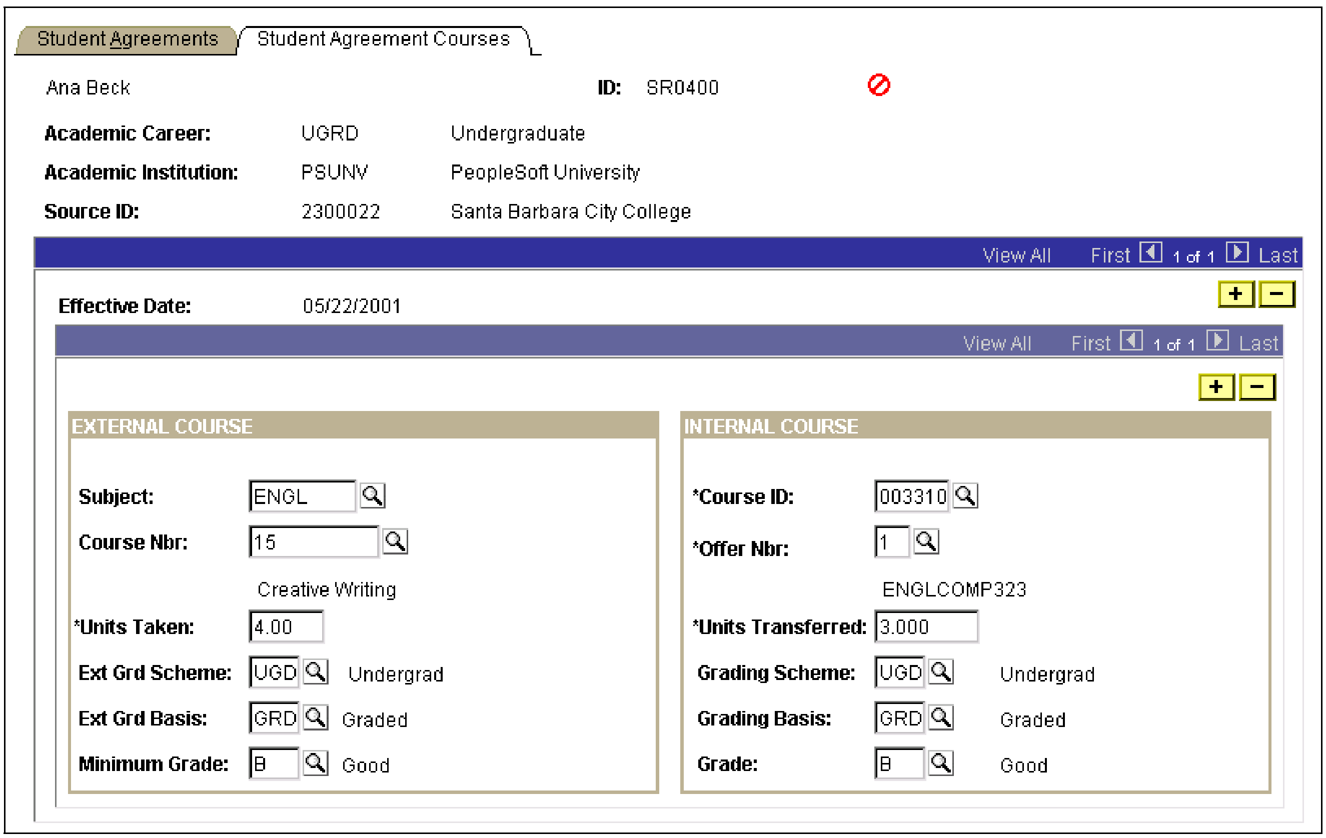
You can use any external organization or internal academic institution as the catalog organization to define external courses for this study agreement. However, once you define an external course on the Study Agreement Courses page, the Catalog Org Type and Catalog Organization fields become unavailable.

Comment Enter any comments relevant to this study agreement.

User ID The system displays the user identification code of the person who entered the study agreement into the system.

Entering the Student Agreement Details

Access the Student Agreement Courses page.



Student Agreement Courses page

EXTERNAL COURSE

Enter the external course information for the study agreement in the EXTERNAL COURSE group box.

Subject Select the subject of the course.

Course Nbr (course number) Select the course number for the external course. If you are using an external organization for the catalog organization (as defined on the

Study Agreements page), the system prompts you with courses that you have associated with the external organization on the School Course Classification page. If you are using an internal academic institution for the catalog organization, the system prompts you with courses defined for that academic institution in the Course Catalog component.

Units Taken By default, the system displays the units of the external course according to the course definition. You can override this default value.

Ext Grd Scheme (external grading scheme) Select the grading scheme from which you can select a valid grading basis for this external course.

Ext Grd Basis (external grading basis) Select a grading basis to define all of the valid grades from which you can select a minimum grade for this external course.

Minimum Grade Select a minimum grade that the student must receive in this external course for the course to fulfill the study agreement.

Note. On this page, the minimum grade needed is a letter grade, whereas in the Course Credit Transfer Rule component the minimum grade is entered as specific grade points. This is a feature, intending that advisors who create student-specific agreements might not always be aware of the grading point scheme.

INTERNAL COURSE

Enter the internal course information for the study agreement in the INTERNAL COURSE group box.

Course ID Select the internal course that is equivalent to the external course for this study agreement. The system prompts you to select a course from your academic institution's course catalog.

Offer Nbr (offering number) By default, the system displays the offering number of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value.

Units Transferred By default, the system displays the units of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value. These units represent the number of units the student will receive for the internal course if the student fulfills the study agreement.

Grading Scheme Select a grading scheme from which you can select a valid grading basis for this external course.

Grading Basis Select a grading basis to define all of the valid grades from which you can select a grade for this internal course.

Grade Select the grade that the student will receive for the internal course if the student fulfills the study agreement.

Processing Course Transfer Credit

This section provides an overview of course transfer credit processing and discusses how to:

- Process course transfer credit models with predefined rules.
- Calculate and post course transfer credit with predefined rules.
- Process course transfer credit models manually.
- Calculate and post course transfer credit manually.
- View student study agreements.
- View incoming and equivalent course information.
- View incoming and equivalent course information details.

Understanding Course Transfer Credit Processing

There are two components to evaluate course transfer credit, the Course Credits component for predefined rules, and the Course Credits - Manual component for creating manual transfer credit models.

Use the Course Credits component to use predefined course transfer equivalency rules to articulate course transfer credit. Predefined rules can be attached to academic programs, academic plans, and student-specific study agreements. You will create models of articulation based on the source of the transfer credit and the student's academic program and plan. You can create as many models as necessary.

To process course transfer credit using predefined equivalency rules:

1. Set up the source information and target information for the transfer credit model on the Transfer Course Details page.
2. Select the articulation term for the model and command the system to evaluate the courses according to the predefined rules in the Transfer Credit Term group box of the Transfer Course Details page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Transfer Summary page.
4. View summary student statistics, once you have saved a posted or unposted model, in the Course Credits Summary group box of the Transfer Summary page.

Use the Course Credits - Manual component to manually input transfer credit. This component is designed to be used for course transfer credit from schools from which you rarely receive students. This saves you from having to go through the rule-defining procedure for a few students.

To process course transfer credit manually:

1. Set up the source information and target information for the transfer credit model on the Transfer Course Entry page.
2. Select the articulation term for the model and enter the incoming course and internal equivalent course information on the Transfer Credit Term group box of the Transfer Course Entry page.

   Save the page to run the Transfer Credit process and articulate the course credit.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Course Credits By Term page.

4. View summary student statistics, once you have saved a posted or unposted model, on the Course Credits Summary group box of the Course Credits By Term page.

Pages Used to Process Course Transfer Credit

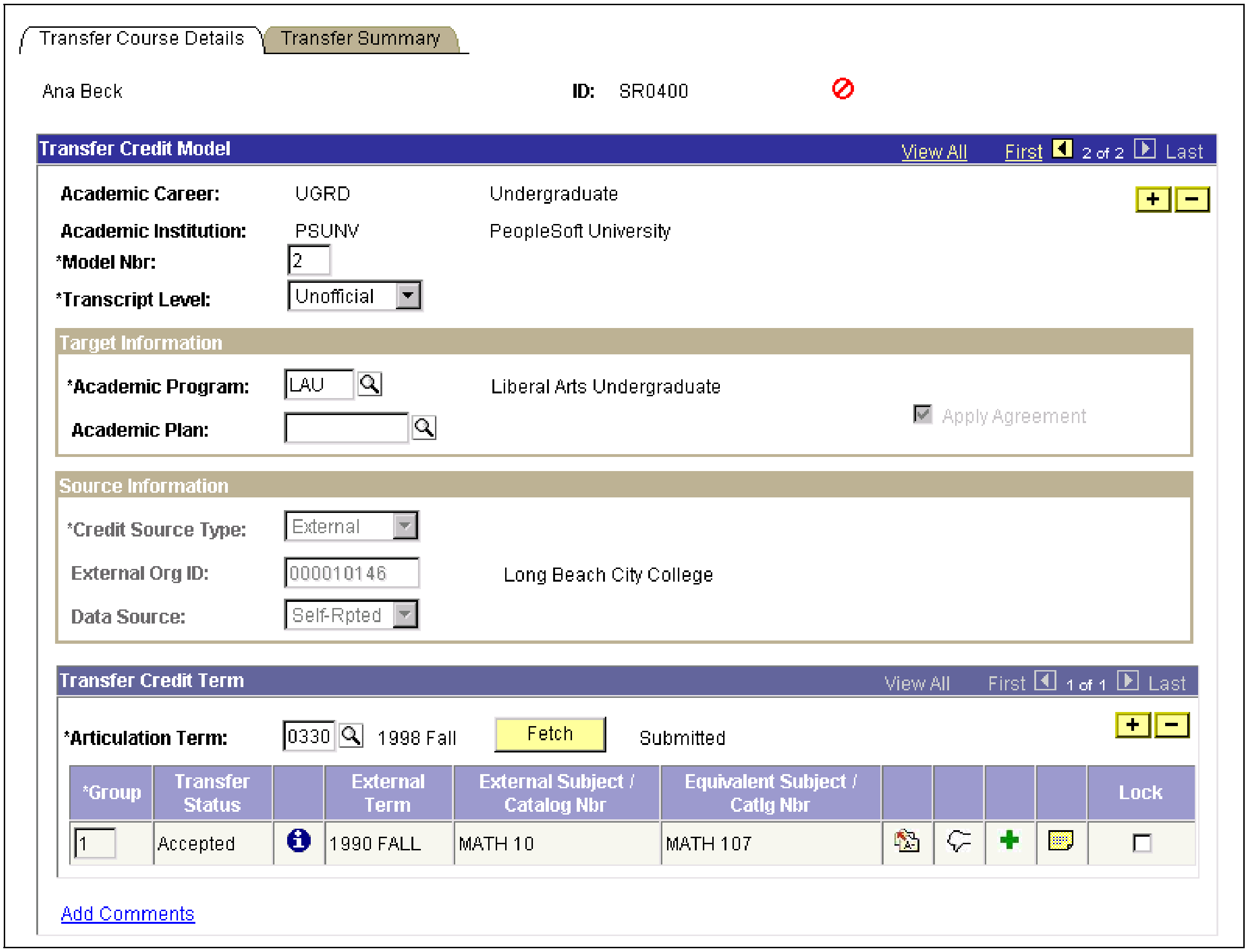
Page Name	Object Name	Navigation	Usage
Transfer Course Details	TRNS_CRSE_DTL	Manage Student Records, Process Transfer Credit, Use, Course Credits, Transfer Course Details	Create course transfer credit models and run the Transfer Credit process to evaluate the models. For each model, you specify target information, source information, and the articulation term. Then you run the Transfer Credit process to articulate course transfer credit, using predefined equivalency rules. You can revise the results as necessary.
Transfer Summary	TRNS_CRSE_TERM	• Manage Student Records, Process Transfer Credit, Use, Course Credits, Transfer Summary • Manage Student Records, Process Transfer Credit, Use, Course Credits - Manual, Course Credits by Term	Calculate an individual's transfer credit statistics, based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.
Transfer Course Entry	TRNS_CRSE_ENTRY	Manage Student Records, Process Transfer Credit, Use, Course Credits - Manual, Transfer Course Entry	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules. This page is essentially the same as the Transfer Course Details page of the Course Credits component with the few exceptions that are described in this section.

Page Name	Object Name	Navigation	Usage
Course Credits By Term	TRNS_CRSE_TERM	• Manage Student Records, Process Transfer Credit, Use, Course Credits, Transfer Summary • Manage Student Records, Process Transfer Credit, Use, Course Credits - Manual, Course Credits by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of the model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit. This is the same page as the Transfer Summary page of the course credits component.
Student Agreements	STDNT_AGR_CRSE_SEC	Click the Study Agreements link on the Transfer Course Details page or the Transfer Course Entry page.	View the details of a student's study agreement, including the external course and the internal equivalent course.
Student Agreement Header Info (student agreement header information)	STDNT_AGR_SEC	Click the Agreement Data link on the Student Agreements page.	View the description, catalog organization, comments about the agreement, and the name of the user who created the study agreement.
Transfer Rule Applied	TRNS_CRSE_RULE_SEC	Click the Transfer Status Detail button on the Transfer Course Details page.	View the course transfer equivalency rule that the Transfer Credit process applied to the corresponding external course. If the course is rejected, the it displays the reject reason. This page applies to transfer credit processing with predefined course equivalency rules.
Reject Reason	TRNS_CRSE_REJR_SEC	Click the Transfer Status Detail button on the Transfer Course Details page.	View the reason why the course transfer equivalency rule was rejected. This page applies only to transfer credit processing with predefined course equivalency rules.
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the Edit Equivalent Course button on the Transfer Course Details page to edit equivalent course information. Click the Add Internal Equivalent button on the Transfer Course Details page to enter additional equivalent courses.	View incoming course credit information for a specific row of a course transfer credit model, and view and edit equivalent course information.

Page Name	Object Name	Navigation	Usage
Equivalent Course Information	TRNS_CRSE_MNL1_SEC	Click the Edit Internal Equivalent button on the Course Transfer Entry page.	View more details about incoming course credit and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.
Course Credit Comments	TRNS_CRSE_DTL_SEC	Click the Comment/Override Reason button on the Transfer Course Details page or the Transfer Course Entry page.	Add an override reason and comment about any adjustments you have made to a group row of a transfer credit model.
Model Comments	TRNS_CRSE_SCH_SEC	Click the Add Comments link on the Transfer Course Details page or the Transfer Course Entry page.	Add comments about this row of the transfer credit model.

Processing Course Transfer Credit Models with Predefined Rules

Access the Transfer Course Details page.



Transfer Course Details page

Apply Agreement

Select to have the Transfer Credit process use the *agreement* equivalency rule selected for the specified academic program, plan, and source combination on the Rules Specification page. Clear this check box to ignore the specified agreement equivalency rule. By default, the system selects this check box.

Fetch

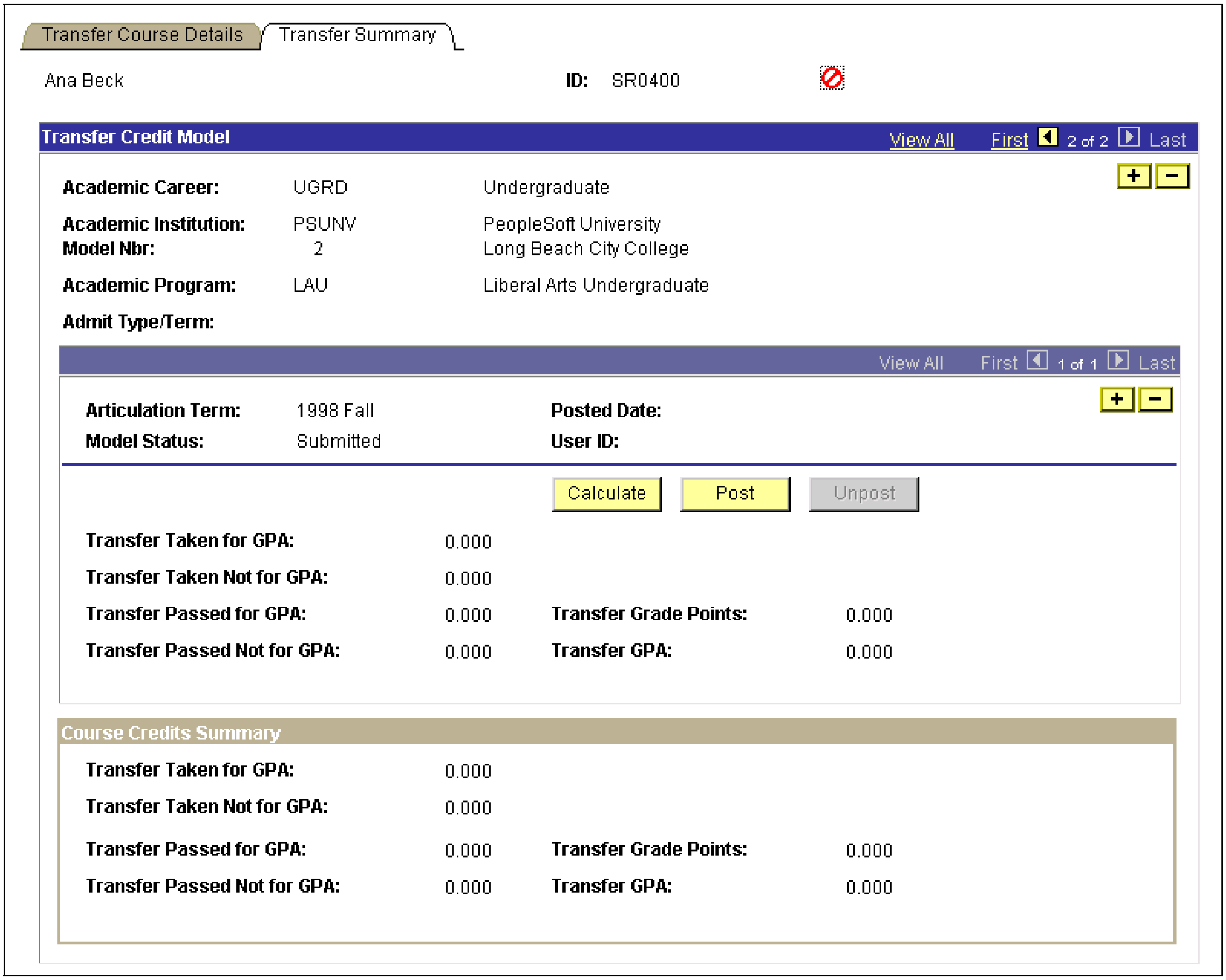
After you have selected an articulation term for this row of the course transfer credit model, click this button to run the Transfer Credit process. The Transfer Credit process COBOL program evaluates the individual's course transfer credit according to the valid course transfer equivalency rules. The process determines valid course transfer equivalency rules for the specified source based on whether the rule is active previous to the begin date of the articulation term and based on whether the rule was attached to the individual's academic program or academic plan for the specified source. The process then compares the individual's external course information to the valid rules and calculates the results. The courses that the process evaluates appear in the grid at the bottom of the page. Define course transfer equivalency rules on the Transfer Subject Area component and attach then to academic programs and academic plans for the source on the Program/Source

	Equivalency component. Enter an individual's external course information on the External Courses page of the Education component.
External Term	After you run the Transfer Credit process for this row of the model, the process displays the external term of each course that it evaluated. The process determines the external term for the transfer course according to the value entered for the course in the corresponding field on the External Courses page of the Education component.
External Subject / Catalog Nbr (external subject/catalog number)	After you run the Transfer Credit process for this row of the model, the process displays the external subject and catalog number of each course that it evaluated. The process determines the external subject and catalog number for the transfer course according to the value entered for the course in the corresponding fields on the External Courses page of the Education component.

Note. Once you post a model, the Source Information group box for that row becomes unavailable.

Calculating and Posting Course Transfer Credit with Predefined Rules

Access the Transfer Summary page.



Transfer Summary page

Calculate

After you articulate course credit, click this button to calculate the individual's transfer credit statistics according to the accepted transfer credit on the corresponding row of the model. You must save your calculations before you can post the transfer credit.

If you selected to include the accepted equivalent courses of this model in the individual's GPA *and* you have transferred grades that include grade points, the system calculates the transfer taken for GPA, the transfer passed for GPA, the transfer grade points, and the transfer GPA.

If you have selected to include the accepted equivalent courses of this model in the individual's GPA *and* you have not transferred grades that include grade points, the system calculates the transfer taken not for GPA and the transfer passed not for GPA.

If you have *not* selected to include the accepted equivalent courses of this model in the individual's GPA, the system calculates the units taken and the units transferred.

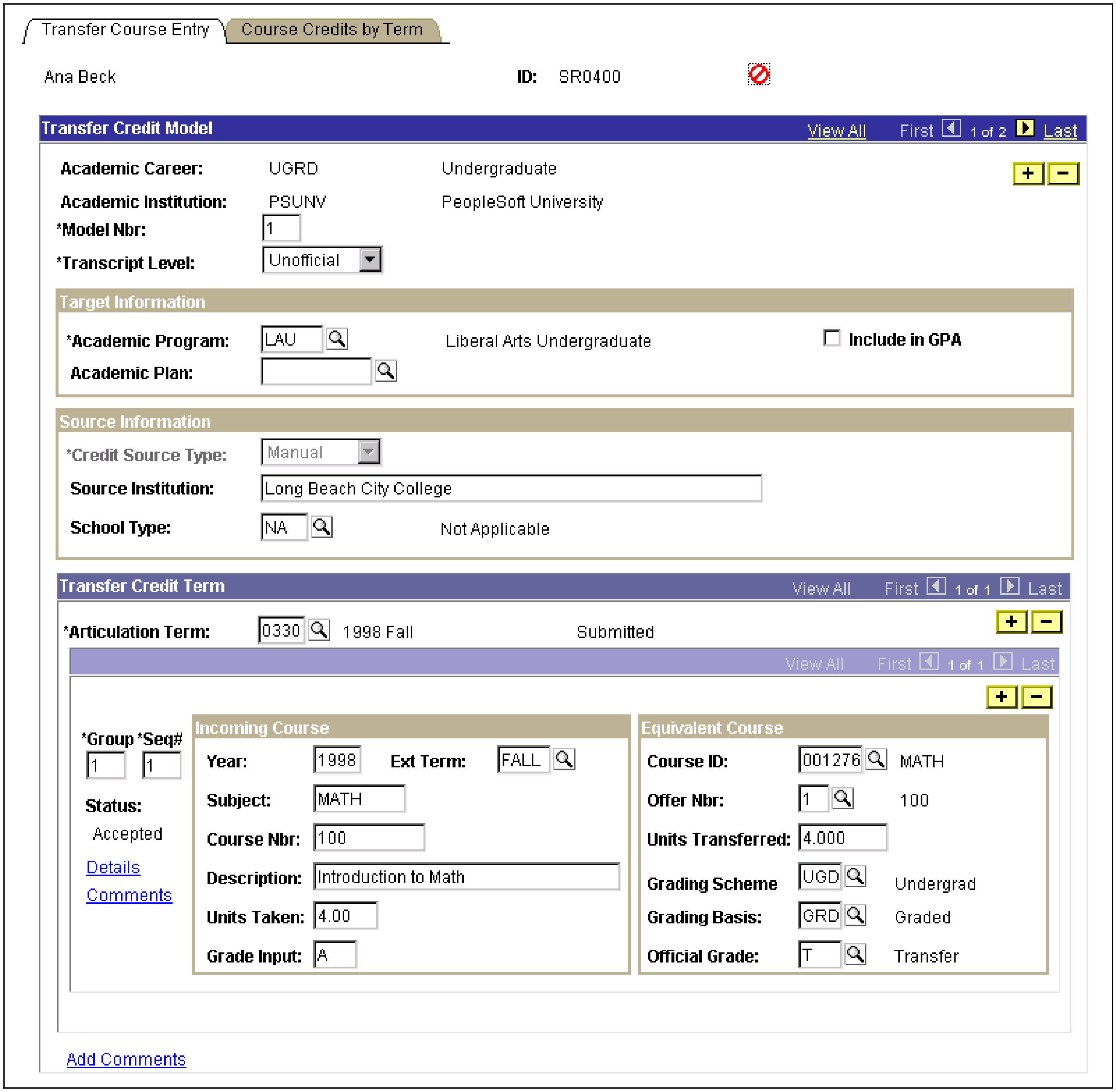
You can select to include transfer credit in the GPA for external organizations and internal academic institutions on the Organization Affiliation page.

Course Credits Summary

Use the Course Credits Summary group box to view a summary of the course credits that have been transferred to the student's record through this model. You can view changes in this group box only after you have posted or unposted the model and saved the transaction. The system displays values for the fields in this group box in relation to the corresponding values that you calculated for the model on this page.

Processing Course Transfer Credit Models Manually

Access the Transfer Course Entry page.



Transfer Course Entry page

Target Information

Include in GPA (include in grade point average)

Select to include eligible courses within this model in the student's cumulative grade point average at your academic institution.

Eligible courses are those courses with the Include in GPA check box selected on the Equivalent Course Information page. Conversely, ineligible courses are those with the Include in GPA check box cleared on the Equivalent Course Information page. The system renders the Include in GPA field on this page unavailable once the model is posted.

Note. The Include in GPA check box in the Target Information group box has no impact on the Academic Advisement engine. The Academic Advisement engine looks at the Include in GPA check box on the Equivalent Course Information page to evaluate course grade points for academic requirements and enrollment requisites.

Transfer Credit Term Scroll Area

Details Click to access the Equivalent Course Information page, where you can edit equivalent course information prior to posting transfer credit.

Comments Click to access the Course Credit Comments page, where you can add an override reason and comment about any adjustments that you have made to this row of the model.

Incoming Course

Use the Incoming Course group box to define your external course information for this row of the transfer credit model.

Year Enter the year in which the incoming course was taken.

Ext Term (external term) Select the external term for each external course you enter.

Subject Enter the subject area of the incoming course.

Course Nbr (course number) Enter the course number for the incoming course.

Description Enter the description of the incoming course.

Units Taken Enter the units taken for the incoming course.

Grade Input Enter the grade received for the incoming course.

Internal Equivalent

Use the Internal Equivalent group box to define the internal course that is equivalent to the incoming course for this row of the transfer credit model.

Course ID Select the course that is equivalent to the incoming course for this row. The system prompts you to select a course from your academic institution's course catalog.

Offer Nbr (offering number) By default, the system displays the offering number of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value.

Units Transferred By default, the system displays the units of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value to transfer a different number of units.

Grading Scheme Select the grading scheme of the specified internal equivalent course. This grading scheme defines all of the valid grading bases from which you can select an official grade for the specified internal equivalent course.

Grading Basis Select the grading basis for the specified internal equivalent course. This grading basis defines all of the valid grades from which you can select an official grade for the specified internal equivalent course.

Official Grade Select the official grade of the specified internal equivalent course. This official grade defines the grade that an individual receives for the specified internal equivalent course.

The value entered here is included in the student's cumulative GPA at your academic institution, provided that you selected the Include in GPA check box on this page and the Equivalent Course Information page.

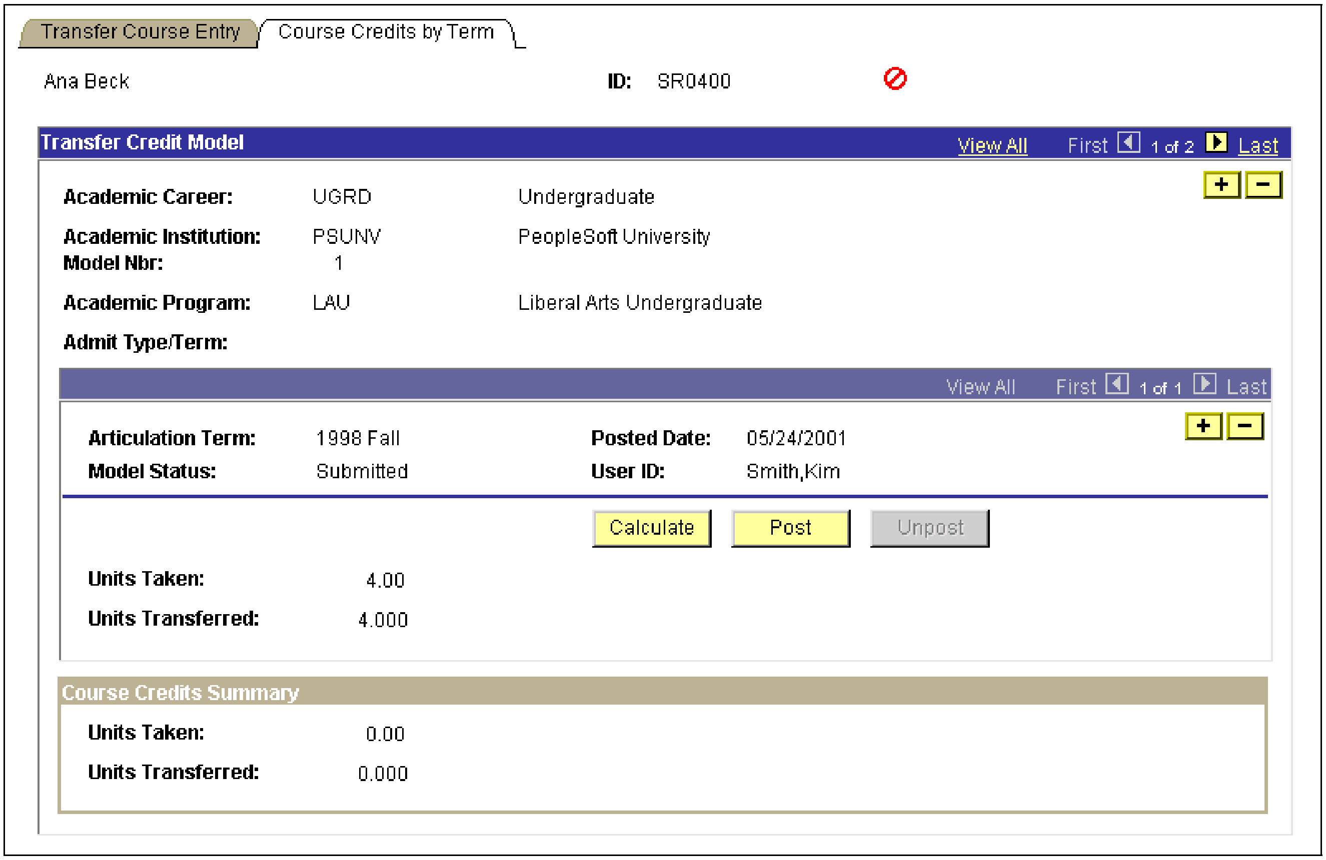
Save After you have selected an articulation term and entered the incoming course and internal equivalent course information for this row of the course transfer credit model, click Save.

See Also

Chapter 29, "Processing Transfer Credit," Viewing Incoming and Equivalent Course Information, page 639

Calculating and Posting Course Transfer Credit Manually

Access the Course Credits By Term page.



Course Credits By Term page

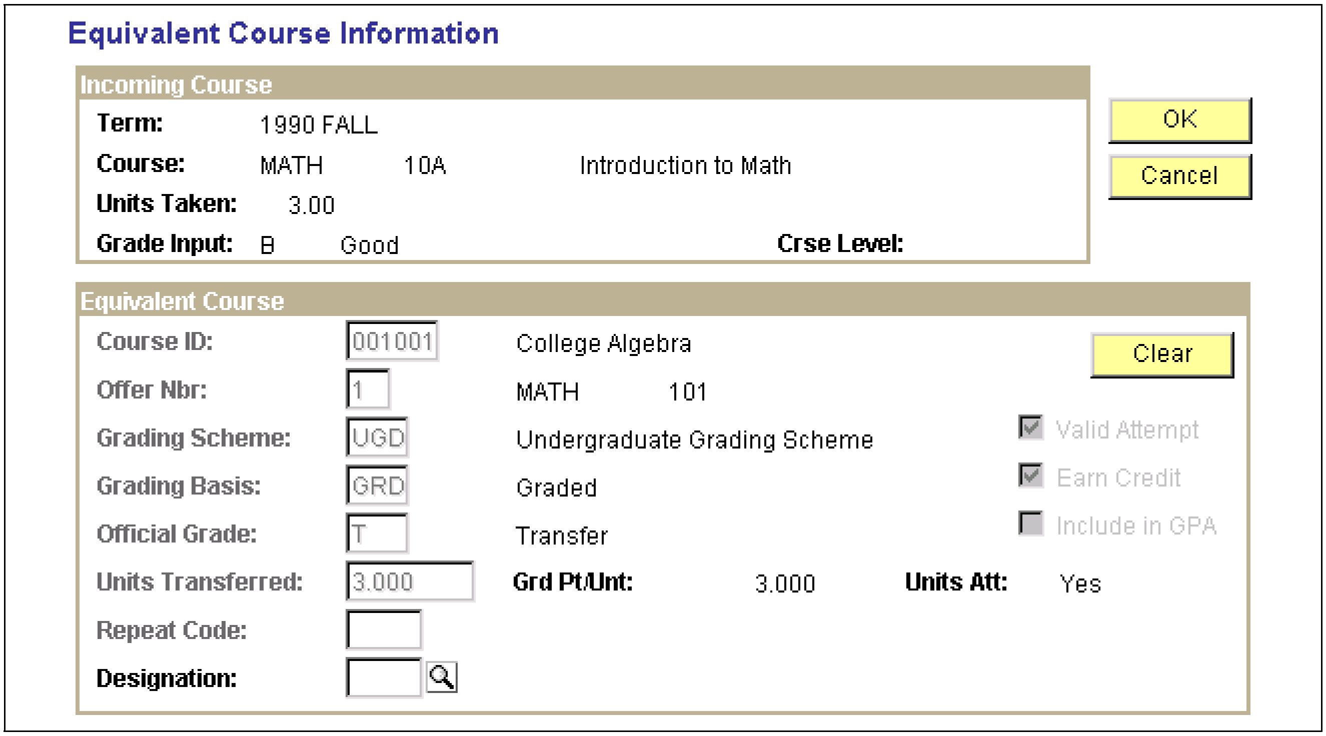
Viewing Student Study Agreements

Access the Student Agreements page.

Agreement Data Click to access the Student Agreement Header Info (student agreement header information) page, where you can view header information about the student-specific study agreement.

Viewing Incoming and Equivalent Course Information

Access the Equivalent Course Information page.



Equivalent Course Information page

Incoming Course

Use the Incoming Course group box to view details about your external course information for this row of the transfer credit model.

Year — The year in which the incoming course was taken.

Term — The external term of each course to evaluate.

Subject — The subject area of the incoming course.

Course Nbr (course number) — The course number for the incoming course.

Description — The description of the incoming course.

Units Taken — The units taken for the incoming course.

Grade Input — The grade received for the incoming course.

Crse Level (course level) — The level for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

Equivalent Course

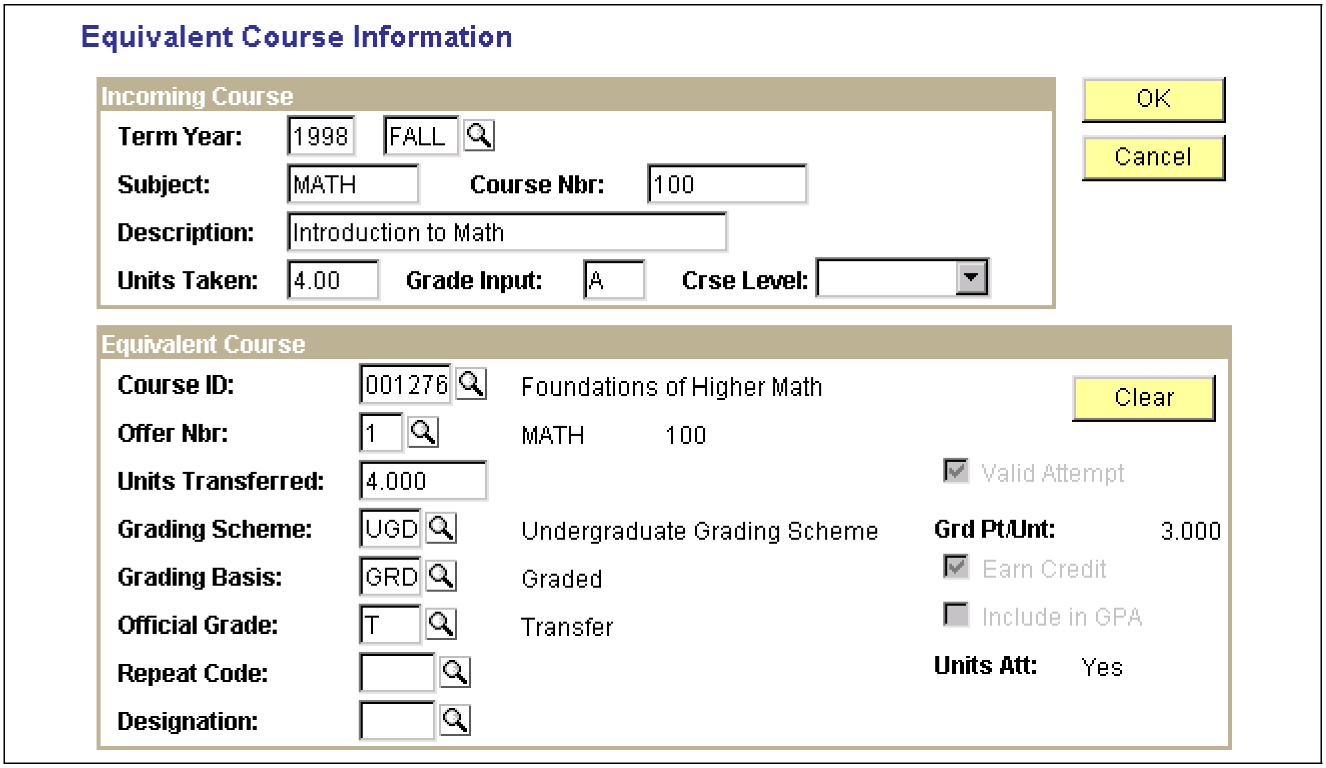
Use the Equivalent Course group box to enter internal equivalent course information.

See Also

Chapter 29, "Processing Transfer Credit," Viewing Incoming and Equivalent Course Information, page 639

Viewing Incoming and Equivalent Course Information Details

Access the Equivalent Course Information page.



Equivalent Course Information page

Incoming Course

Use the Incoming Course group box to view details about your external course information for this row of the transfer credit model and to edit this information.

Year	Enter the year in which the incoming course was taken.
Term	Select the external term of each course to evaluate.
Subject	Enter the subject area of the incoming course.
Course Nbr (course number)	Enter the course number for the incoming course.
Description	Enter the description of the incoming course.
Units Taken	Enter the units taken for the incoming course.
Grade Input	Enter the grade received for the incoming course.
Crse Level (course level)	Select the level for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Course ID	Select the course that is equivalent to the incoming test credit for this row of the transfer credit model. The system prompts you to select a course from your academic institution's course catalog.
Offer Nbr (offering number)	By default, the system displays the offering number of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value.
Grading Scheme	Select the grading scheme of the specified internal equivalent course. This grading scheme defines all of the valid grading bases from which you can select an official grade for the specified internal equivalent course.
Grading Basis	Select the grading basis for the specified internal equivalent course. This grading basis defines all of the valid grades from which you can select an official grade for the specified internal equivalent course.
Official Grade	Select the official grade of the specified internal equivalent course. This official grade defines the grade that an individual will receive for the specified internal equivalent course. The value entered here is included in the student's cumulative GPA at your academic institution provided that the Include in GPA check box on this page and the Equivalent Course Information page has been selected.
Units Transferred	By default, the system displays the units of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value to transfer a different number of units.
Grd Pt / Unt (grade points per units)	The grade points per unit for the equivalent course.
Units Att (units attempted)	The units attempted for the equivalent course.
Repeat Code	Select the appropriate repeat code to indicate that the course is a repeat for the student. The Repeat Checking process automatically runs as part of the posting process.
Designation	If the equivalent course is defined as fulfilling a requirement designation in the course catalog, the system supplies the requirement designation code. Otherwise, select the requirement designation code if the course fulfills one.
Valid Attempt	The system displays whether the grade that the student receives for the equivalent course is a valid attempt of the equivalent course. Define valid attempts on the Grading Scheme Table page.
Earn Credit	The system displays whether the grade the student receives for the equivalent course counts toward course and degree credit. Define earn credit on the Grading Scheme Table page.
Include in GPA	The system displays whether the specified grade is included in GPA calculations. Define include in GPA on the Grading Scheme Table page.

Clear	Click to delete all of the equivalent course information and return the fields to their default values. It can be used as an aid in editing and for rejecting the incoming course if this was the only equivalent course for the group.
OK	Click to save your data and return to the previous page. To update the transfer status on the previous page, you must click this button. If you press the ENTER key on your keyboard, the transfer status will not be updated.
Accept	When incoming transfer credit has a status of *Contingent* an Accept button appears on the Equivalent Course Information page. To accept the transfer credit and exit this page, click the Accept button. The system automatically updates the status of the transfer credit to *Accepted.*

Processing Test Transfer Credit

This section provides an overview of test transfer credit processing and discusses how to:

- Process test transfer credit models with predefined rules.
- Calculate and post test transfer credit with predefined rules.
- Process test transfer credit models manually.
- Calculate and post test transfer credit manually.
- View incoming test and equivalent course information.
- Add incoming test and equivalent course information manually.

Understanding Test Transfer Credit Processing

There are two components to evaluate test transfer credit, the Test Credits component for predefined rules and the Test Credits - Manual component for creating test credit models manually. After you have set up your test codes and test components, and you have read the Processing Course Transfer Credit section, the pages for processing test credit will be familiar.

Use the Test Credits component if you want to use predefined test transfer equivalency rules to articulate test transfer credit. You can attach predefined rules to academic programs and academic plans. You will create models of articulation based on the individual's academic program or academic plan. You can create as many models as necessary.

To process test transfer credit using predefined equivalency rules:

1. Set up the target information for the transfer credit model on the Test Credit Details page.
2. Select the articulation term for the model and command the system to evaluate the test credit according to the predefined rules on the Test Credit Details page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Test Credits By Term page.
4. View summary student statistics, once you have saved a posted or unposted model, in the Total Units - Posted Model field on the Test Credits By Term page.

Use the Test Credits - Manual component to input transfer credit manually with equivalencies that you enter as you go along. This component is designed for test transfer credit from sources from which you rarely receive test results. This saves you from having to go through the rule defining procedure for a few students.

To process test transfer credit manually:

1. Set up the target information for the transfer credit model on the Test Credit Entry page.
2. Select the articulation term for the model and enter the incoming test and internal equivalent course information on the Test Credit Entry page.

   Save the page to run the Transfer Credit process and articulate the test credit.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Test Credits By Term page.
4. View summary student statistics, once you have posted a model, in the Total Units - Posted Model field on the Test Credits By Term page.

Pages Used to Process Test Transfer Credit

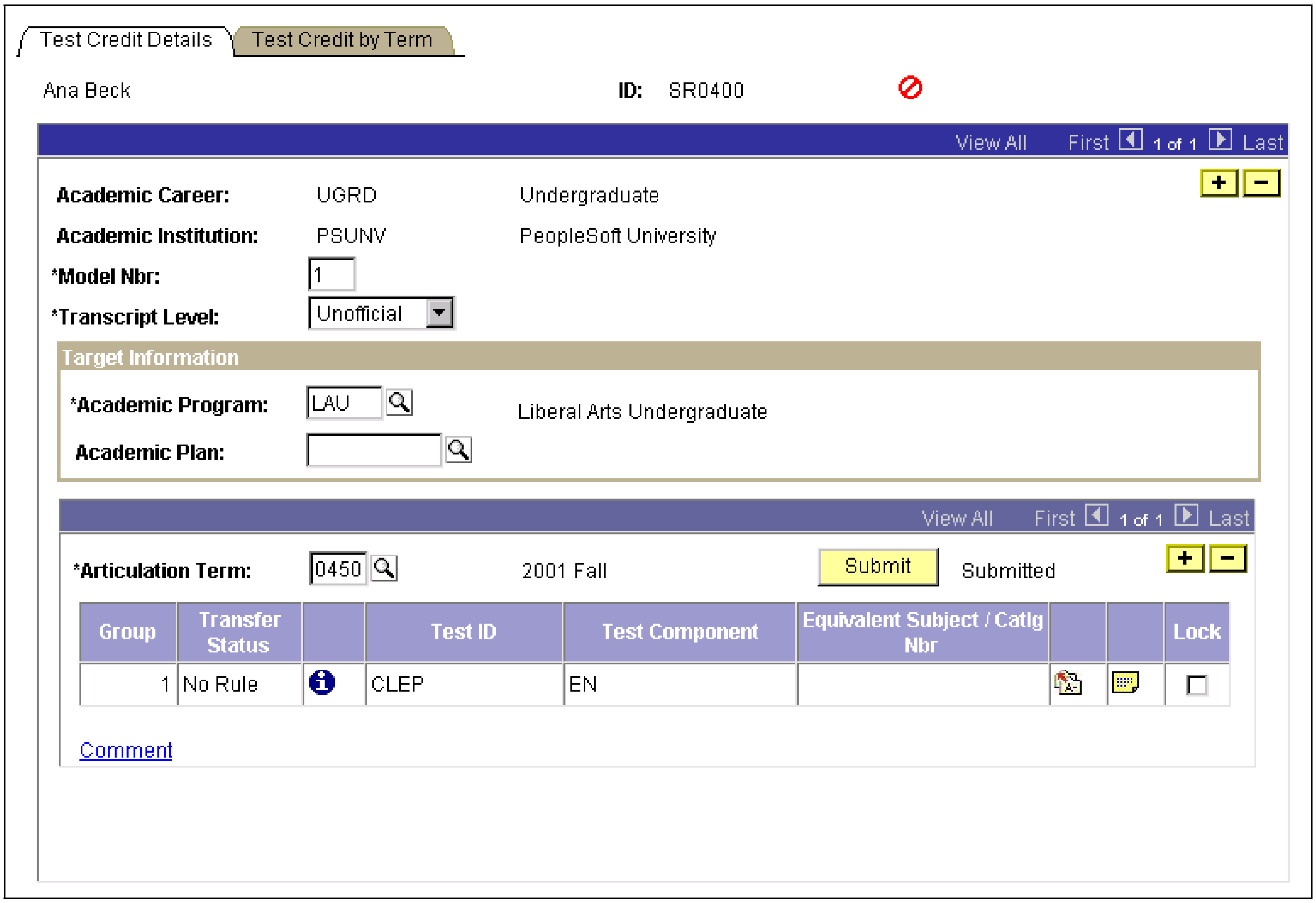
Page Name	Object Name	Navigation	Usage
Test Credit Details	TRNS_TEST_DETAIL	Manage Student Records, Process Transfer Credit, Use, Test Credits, Test Credit Details	Create test transfer credit models and run the Transfer Credit process to evaluate the models. For each model, specify a target academic program, the academic plan if applicable, and the articulation term. Then run the Transfer Credit process. You can revise the results as necessary.
Test Credit by Term	TRNS_TEST_TERM	• Manage Student Records, Process Transfer Credit, Use, Test Credits, Test Credit by Term • Manage Student Records, Process Transfer Credit, Use, Test Credits - Manual, Test Credit by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.

Page Name	Object Name	Navigation	Usage
Test Credit Entry	TRNS_TEST_ENTRY	Manage Student Records, Process Transfer Credit, Use, Test Credits - Manual, Test Credit Entry	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules. This page is essentially the same as the Test Credit Details page of the Test Credits component, with a the few exceptions that are described in this section.
Transfer Rule Applied	TRNS_TEST_RULE_SEC	Click the Transfer Status Detail button on the Test Credit Details page.	View the test transfer equivalency rule that the Transfer Credit process applied to the corresponding external course. If the test is rejected, the Reject Reason page displays the reject reason. The Transfer Rule Applied page applies only to transfer credit processing with predefined test equivalency rules.
Reject Reason	TRNS_TEST_REJR_SEC	Click the Transfer Status Detail button on the Test Credit Details page.	View the reason why the test transfer equivalency rule was rejected. This page applies only to transfer credit processing with predefined test equivalency rules.
Equivalent Course Information	TRNS_TEST_INT_SEC	Click the Edit Equivalent Course button on the Test Credit Details page to edit equivalent course information. Click the Add Internal Equivalent button on the Test Credit Details page to enter additional equivalent courses.	View incoming test credit information for a specific row of a test transfer credit model, view and edit equivalent course information, and enter additional equivalent courses and corresponding information.
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the Edit Internal Equivalent button on the Test Credit Entry page.	Add incoming test credit information and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.
Test Credit Comments	TRNS_TEST_DTL_SEC	Click the Comment/Override Reason button on the Test Credit Details page or the Test Credit Entry page.	Add an override reason and comment about any adjustments you made to a group row of a transfer credit model.

Page Name	Object Name	Navigation	Usage
Model Comments	TRNS_TEST_MOD_SEC	Click the Comment link on the Test Credit Details page or the Test Credit Entry page.	Add comments about this test transfer credit model.

Processing Test Transfer Credit Models with Predefined Rules

Access the Test Credit Details page.



Test Credit Details page

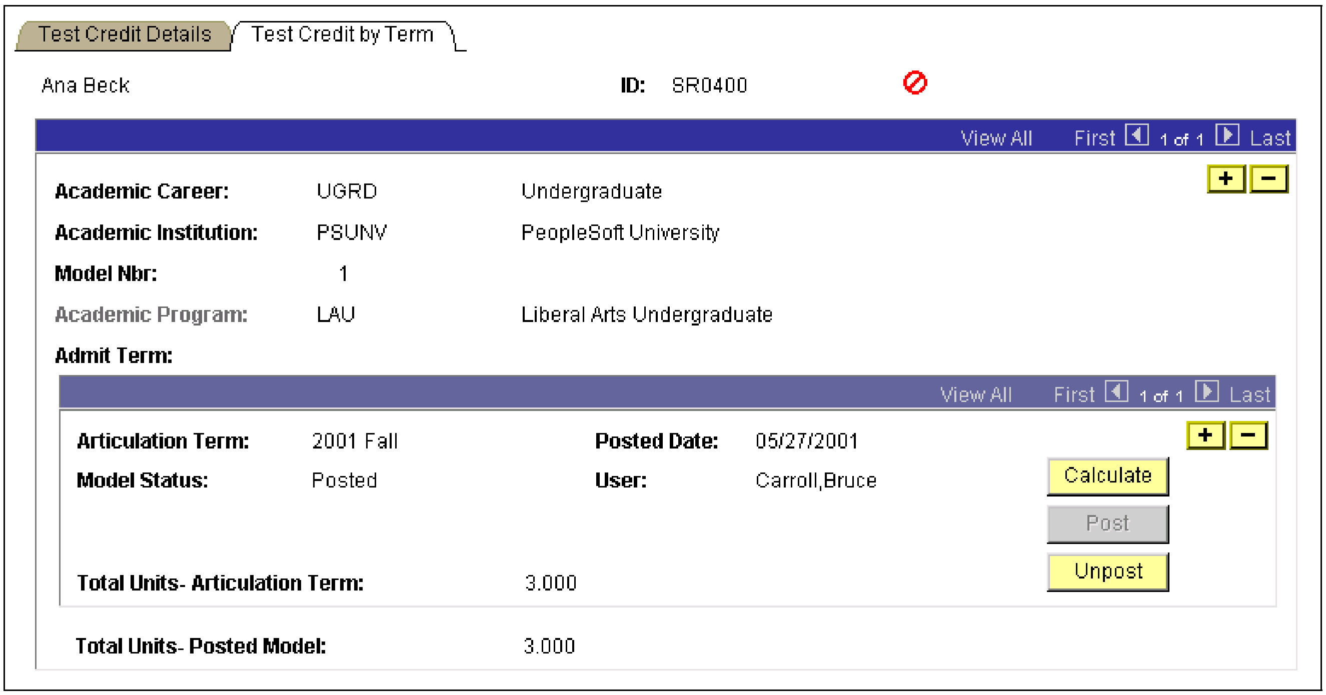
Submit After you have selected an articulation term for this row of the course transfer credit model, click this button to run the Transfer Credit process. The Transfer Credit process COBOL program evaluates the individual's test transfer credit according to the valid test transfer equivalency rules. The process determines valid course transfer equivalency rules, based on whether the rule is active previous to the begin date of the articulation term and based on whether the rule has been attached to the individual's academic program or academic plan. The process then compares the individual's external test information to the valid rules and calculates the results. The tests that the process evaluates appear in the grid at the bottom of the page. Define test transfer equivalency rules on the Test Credit Rule / Component page and attached to academic programs and academic plans for the source on the Test Credit Equivalency page. An individual's external test information is entered on the Test Results component.

Test ID After you run the Transfer Credit process for this row of the model, the process displays the identification code of each test that it evaluated. The process determines the individual's tests according to the value entered for the test in the corresponding fields on the Test Results component.

Test Component After you run the Transfer Credit process for this row of the model, the process displays the component of each test that it evaluated. The process determines the individual's test components according to the value entered for the test in the corresponding fields on the Test Results component.

Calculating and Posting Test Transfer Credit with Predefined Rules

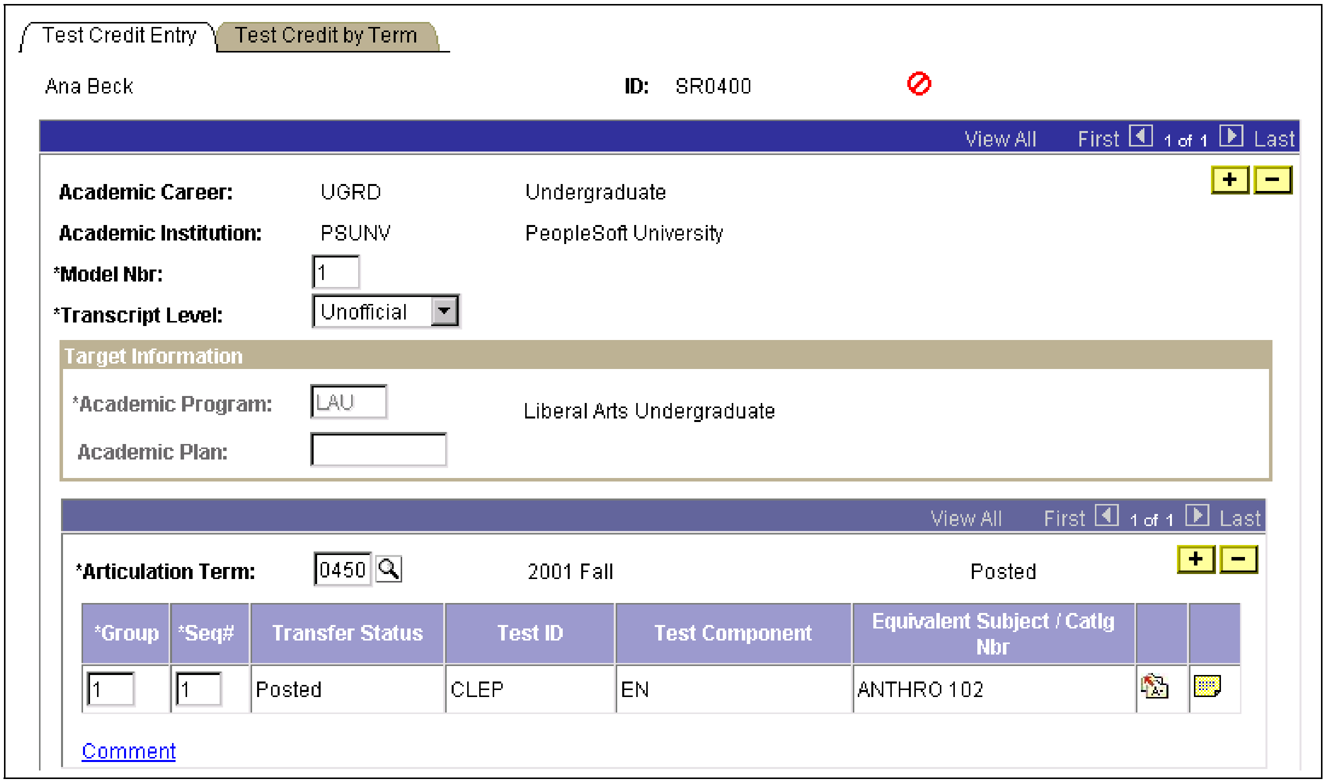
Access the Test Credit by Term page.



Test Credit by Term page

Processing Test Transfer Credit Models Manually

Access the Test Credit Entry page.



Test Credit Entry page

Test ID

After you select a test ID on the Equivalent Course Information page for this row of the model, the system displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

Test Component

After you select a test component on the Equivalent Course Information page for this row of the model, the system displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

Save

After you have selected an articulation term and entered the incoming test credit and internal equivalent course information for this row of the test transfer credit model, click Save to run the Transfer Credit process. The Transfer Credit process COBOL engine evaluates the individual's test transfer credit according to the test credit and internal equivalent information on the Incoming Course information page.

Calculating and Posting Test Transfer Credit Manually

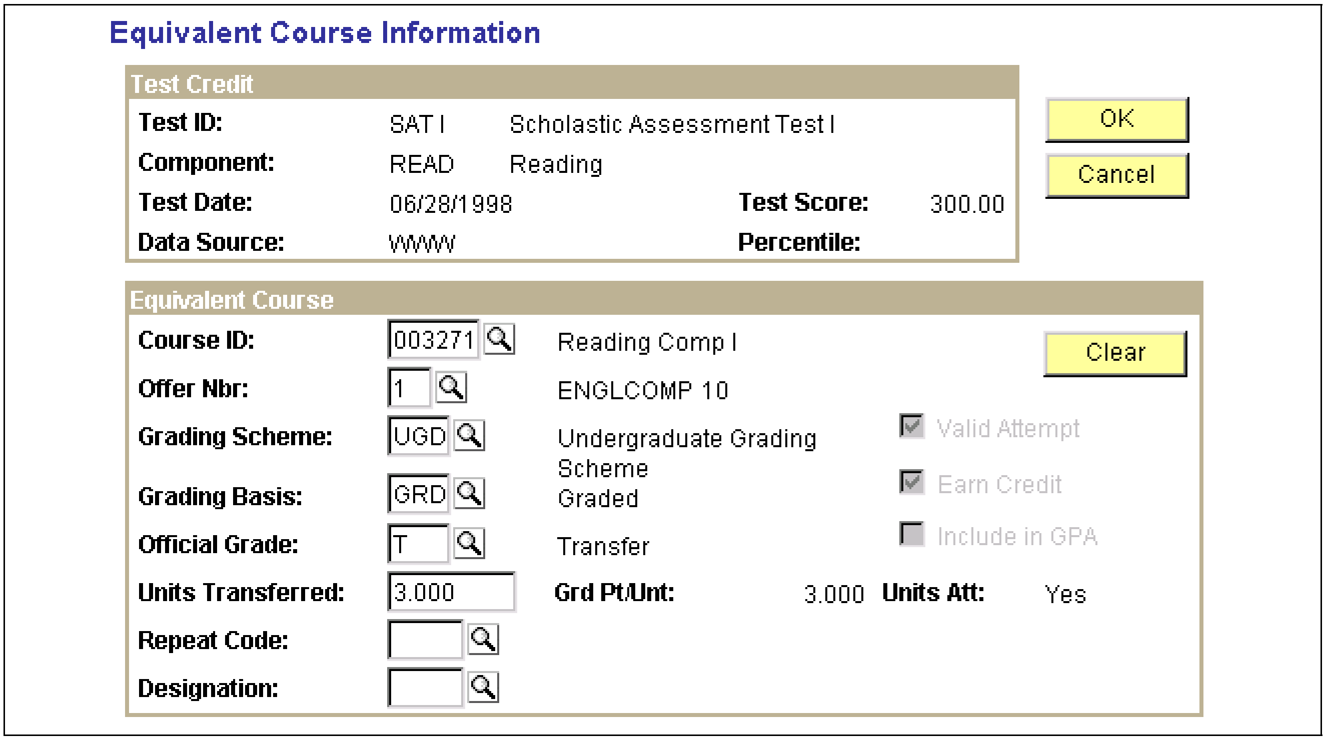
Access the Test Credit by Term page. The Test Credit By Term page in the Test Credits - Manual component is exactly the same page as the Test Credits By Term page in the Test Credits Component.

See Also

Chapter 29, "Processing Transfer Credit," Calculating and Posting Course Transfer Credit Manually, page 638

Viewing Incoming Test and Equivalent Course Information

Access the Equivalent Course Information page.



Equivalent Course Information page

Test Credit Input

Use the Test Credit Input group box to view test information.

Test ID The identification number of the test for which you are defining a course equivalency.

Component The component of the test for which you are defining a course equivalency.

Test Date The date that the test was taken.

Test Score The individual's test score.

Data Source The data source.

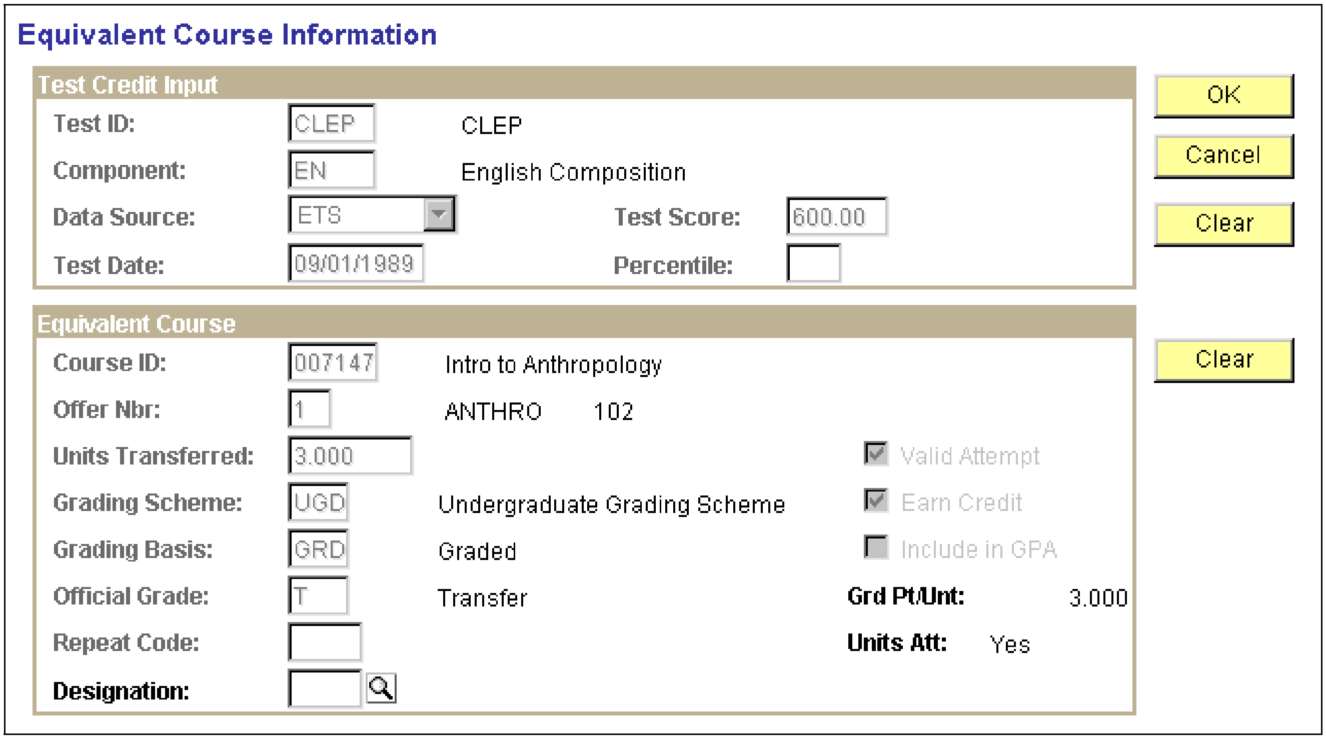
Percentile The percentile of the individual's score.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Adding Incoming Test and Equivalent Course Information Manually

Access the Equivalent Course Information page in Add mode.



Equivalent Course Information page

Test Credit Input

Use the Test Credit Input group box to enter test information.

Test ID Select the identification number of the test for which you are defining a course equivalency. If you change the test ID, the system automatically clears the data in the Component, Test Score, and Percentile fields.

Component Select the component of the test for which you are defining a course equivalency. Select the test component. The system will supply the description of the component.

Test Date Enter the date that the test was taken.

Test Score Enter the individual's test score. The score that you enter must be within the specified range for the test ID and component, as defined on the Test Tables page. You can enter a test score or a percentile, but not both.

Data Source Select the data source.

Percentile Enter the percentile of the individual's score. The value that you enter must be from 1 to 100 percent. You can enter a test score or a percentile, but not both.

Clear Click to clear data from all the fields in the Test Credit Input group box and return the fields to their default values.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Processing Other Transfer Credit

This section provides an overview of other transfer credit processing and discusses how to:

- Process other transfer credit models.
- Calculate and post other transfer credit.
- Add incoming other credit and equivalent course information.

Understanding Other Transfer Credit Processing

Processing other transfer credit, credit for prior learning, is always a manual process. The pages in the Other Credit component are very similar to the course credit and test credit components. After you have read the Processing Course Transfer Credit section, the pages for processing other credit will be familiar.

The other credit category is appropriate because it requires no external organization information. However, you must assign other credit through a course in your academic institution's course catalog. Therefore, you might set up special summary courses in the course catalog, then grant the student additional transfer credits using these special courses.

To process other transfer credit:

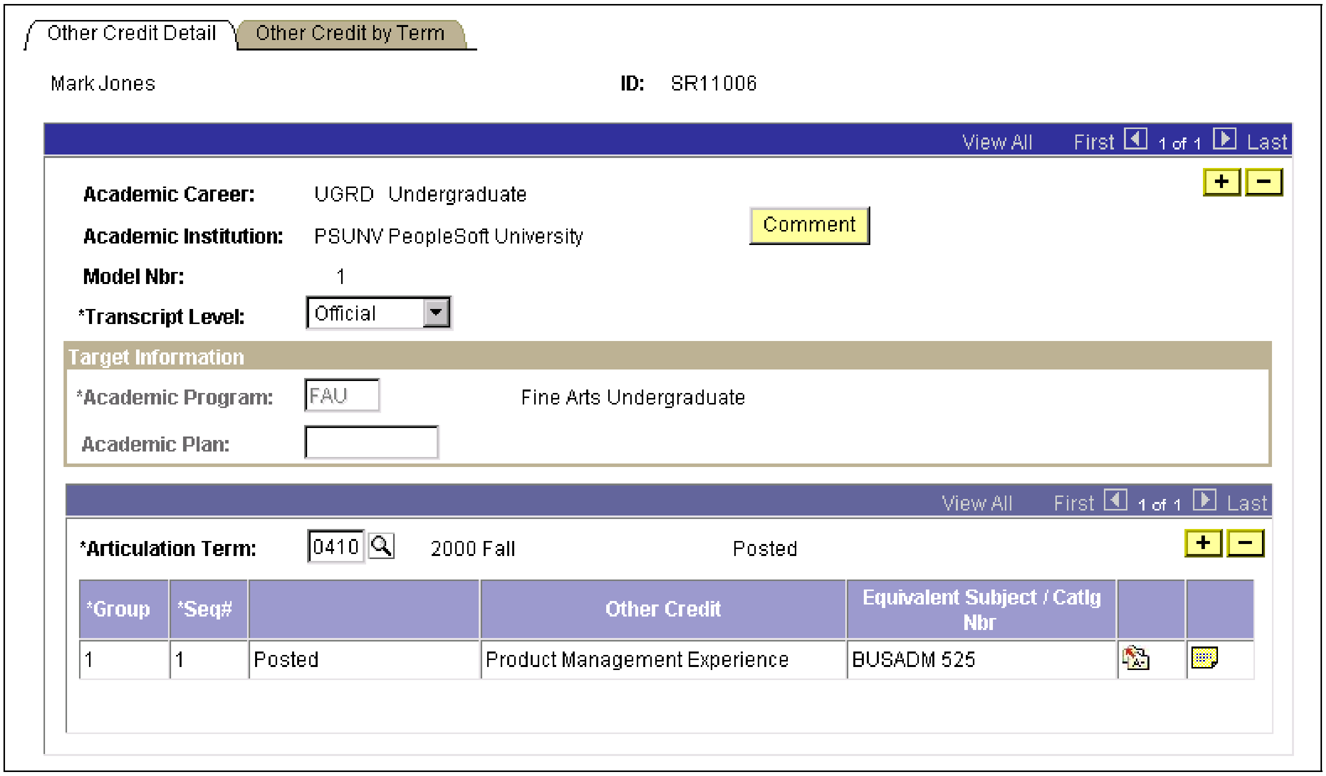
1. Set up the target information for the transfer credit model on the Other Credit Detail page.
2. Select the articulation term for the model and enter the equivalent course information on the Other Credit Detail page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Other Credit By Term page.
4. View summary student statistics, once you have posted a model, in the Total Units - Posted Model field on the Test Credits By Term page.

Pages Used to Process Other Transfer Credit

Page Name	Object Name	Navigation	Usage
Other Credit Detail	TRNS_OTHR_DETAIL	Manage Student Records, Process Transfer Credit, Use, Other Credits, Other Credit Detail	Set up other transfer credit models and articulate transfer credit. For each model, you specify target information, the articulation term, other credit information, and internal equivalent course information.
Other Credit by Term	TRNS_OTHR_TERM	Manage Student Records, Process Transfer Credit, Use, Other Credits, Other Credit by Term	Calculate transfer units statistics for a model, post and unpost transfer credit, and view a summary of transfer credit statistics.
Equivalent Course Information	TRNS_OTHR_EDIT_SEC	Click the Edit Equivalent Course button on the Other Credit Detail page.	Add incoming other credit information and internal equivalent course information for a specific model. You can also use this page to edit information that you have previously saved.
Other Credit Comments	TRNS_OTHR_DTL_SEC	Click the Comment/Override Reason button on the Other Credit Detail page.	Add an override reason and comment about any adjustments you have made to a group row of a transfer credit model.
Model Comments	TRNS_OTHR_MOD_SEC	Click the Comment button on the Other Credit Detail page.	Add comments about this row of the transfer credit model.

Processing Other Transfer Credit Models

Access the Other Credit Detail page.



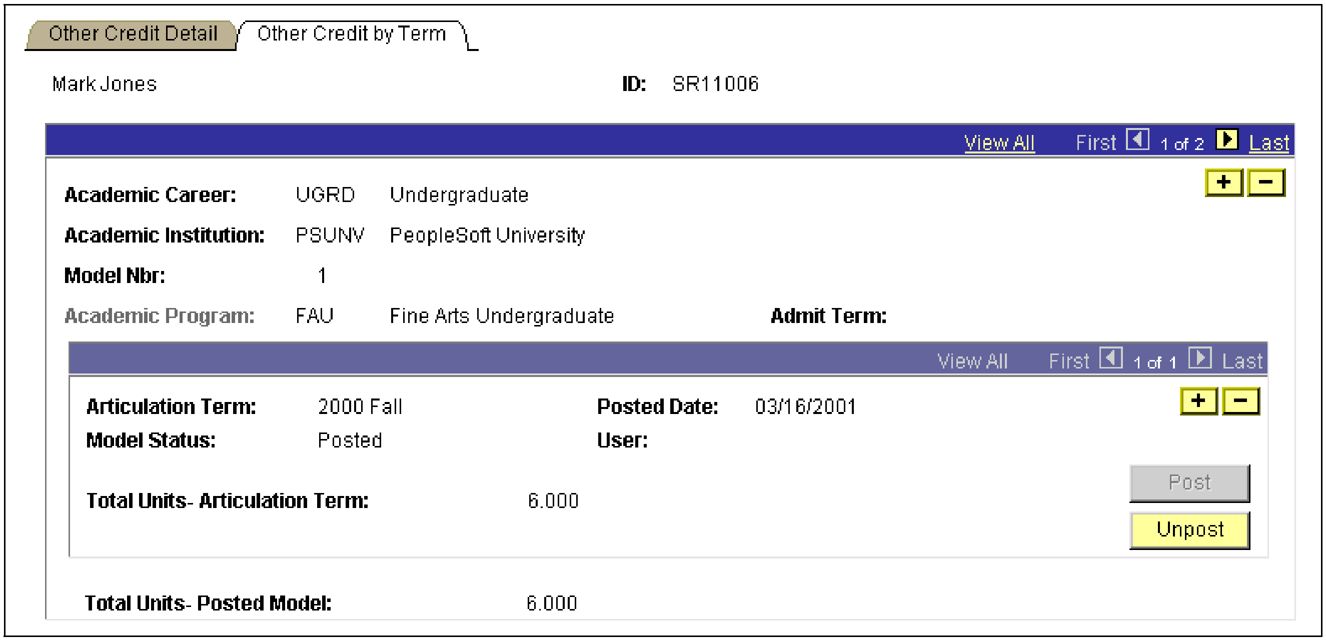
Other Credit Detail page

Other Credit After you enter other credit on the Equivalent Course Information page for this row of the model, the process displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

Save After you have selected an articulation term and entered the incoming other credit and internal equivalent course information for this row of the other transfer credit model, click Save.

Calculating and Posting Other Transfer Credit

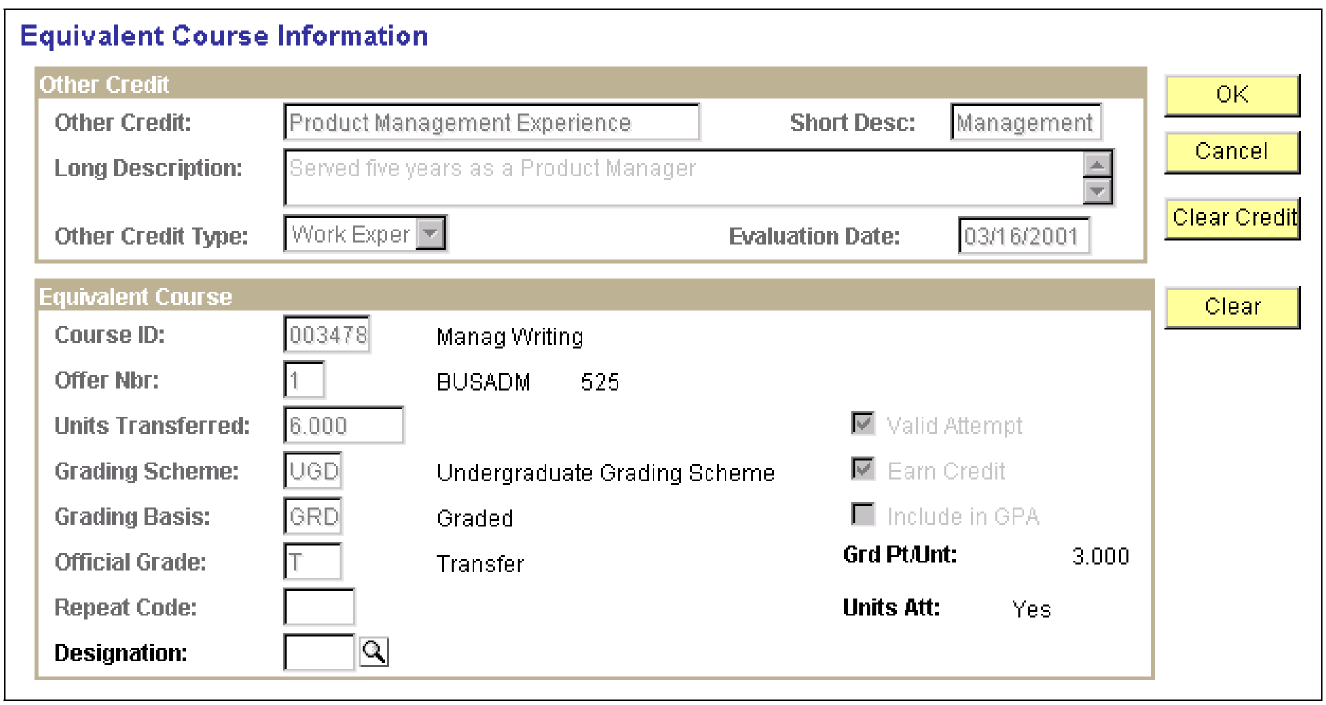
Access the Other Credit by Term page.



Other Credit by Term page

Adding Incoming Other Credit and Equivalent Course Information

Access the Equivalent Course Information page.



Equivalent Course Information page

Other Credit

Use the Other Credit group box to enter information about other credit.

Other Credit	Enter a description of the other credit.
Short Desc (short description)	Enter a short description of the other credit.
Long Description	Enter a long description of the other credit.
Other Credit Type	Select the type of other credit. Values for this field are delivered with your system as translate values. You can modify these values.
Evaluation Date	Enter the evaluation date of the other credit.
Clear Credit	Click to clear the fields in the Other Credit group box. This button works for new data that you are entering and data that you have previously saved in the fields.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Processing Transfer Credit in Batch

This section discusses how to:

- Post transfer credit in batch.
- View process results for batch posting of transfer credit.

Understanding Batch Transfer Credit Processing

Processing a student's transfer credit can be a complicated and time-consuming process. Aside from transferring credit from an external organization to your academic institution, you might want to move a student's credit from one academic career to another or from one internal academic institution to another.

To make processing transfer credit easier, use the Batch Transfer Credit feature. This feature enables you to process transfer credit by batch, simplifying your online data entry and reducing processing time. Provided that you have already entered the student's external education record and defined the transfer credit equivalency rules, you can submit a request to have transfer credit modeled for a group of students that match the parameters you specify. Once you submit your request, the system performs the model setup, transfer articulation, and posting processes for all students in the group.

To process transfer credit by batch:

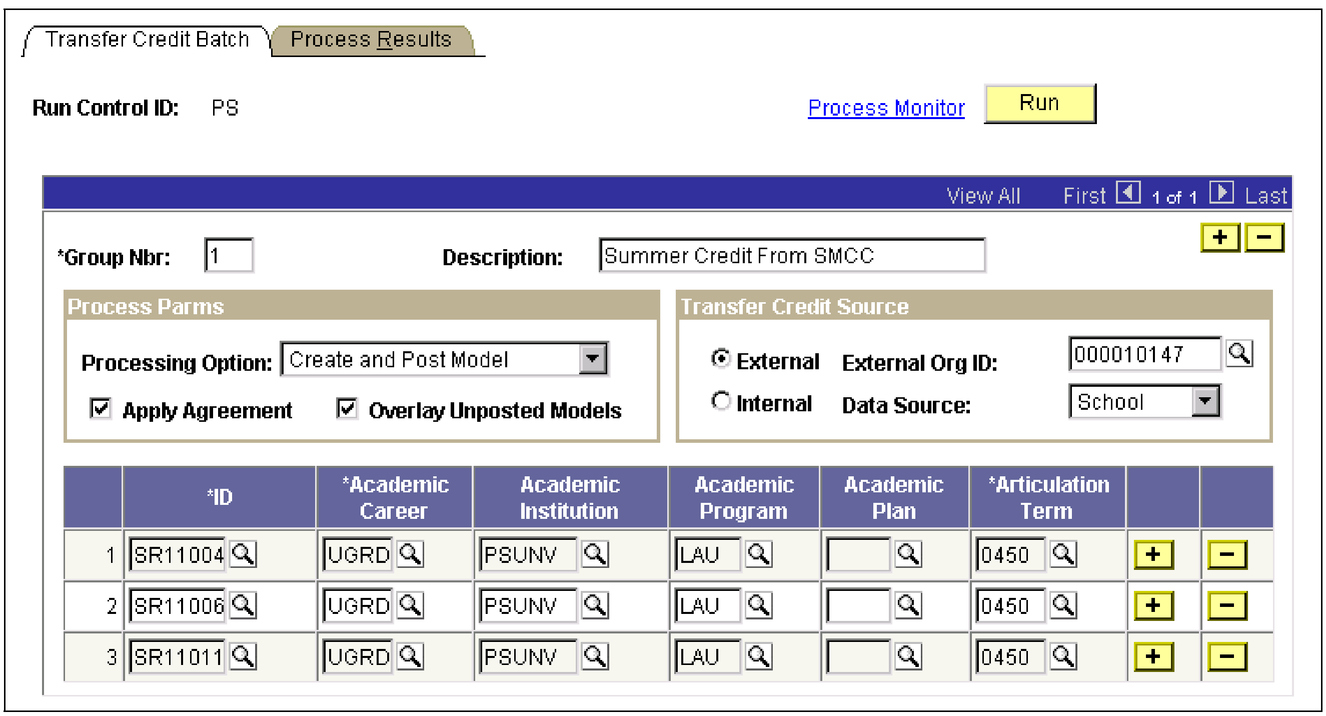
1. Define the posting process on the Process Definitions page.
2. Define the processing parameters—the group of students to process by batch—on the Transfer Credit Batch page, then run the process through PeopleSoft Process Scheduler.

Pages Used to Process Transfer Credit in Batch

Page Name	Object Name	Navigation	Usage
Transfer Credit Batch	RUNCTL_SR_TRCRBP	Manage Student Records, Process Transfer Credit, Process, Batch Posting, Transfer Credit Batch	Post transfer credit in batch. Process parameters include the student's identification code, the keys that the system will use in retrieving incoming transfer credit, plus the target academic career, academic program, academic plan (where applicable), and articulation term.
Process Results	RUNCTL_SR_TRCRBPER	Manage Student Records, Process Transfer Credit, Process, Batch Posting, Process Results	View information related to the process that you have run on the Transfer Credit Batch page. To view a student's statistics after you run the process, go to the student's individual transfer credit record on the appropriate component—either external course credit, test credit, or other credit.

Posting Transfer Credit Batch in Batch

Access the Transfer Credit Batch page.



Transfer Credit Batch page

Group Nbr (group number) — The group number is the numeric counter that distinguishes each row of the process instance apart from other rows. By default, the system displays the first group as *1* and increases the number by one as you add groups to the process instance.

Description — Enter a description of the group to uniquely identify the group.

Processing Option — Select from the following choices the processing option to use for this run of the process. Depending on the option you select, you can create models in batch, post models in batch, or do both at the same time.

Create Model: Select this option to create transfer credit models based on the student external education record for external transfers or based on the academic career record for internal transfers.

Post Model: Select this option to post models that have already been created. If the student is active in the articulation term and academic program that you select, the system posts the transfer credit to each affected student's career term record, sets the transfer model to posted, then automatically runs the Repeat Checking process. If a student is not active in the articulation term and academic program that you select, the system does not post the transfer model. Instead, the system sets the transfer model status to *Completed*. Once the student is activate for the specified academic program and articulation term, you can move the transfer statistics to the student's career term record using the transfer credit copy function on the Terms in Residence page.

Create and Post Model: Select this option to create the model and then post it in the same run of the process.

Apply Agreement — Select to have the Transfer Credit process use the *agreement* equivalency rule selected for the specified academic program, academic plan, and source combination on the Rules Specification page. Clear this check box to ignore the specified agreement equivalency rule. By default, the system selects this check box.

Overlay Unposted Models — Select if you are rerunning the batch and you want to overlay any unposted models.

Transfer Credit Source

In the Transfer Credit Source group box, select the type of source from which you will be modeling transfer credit for this group. Your selection instructs the system from which table you will be selecting your source.

External — Select to have the system prompt you with the source IDs of external organizations in your system. The External Org ID and Data Source fields appear and are available.

Internal — Select to have the system prompt you with source IDs of academic institutions in your system. You would select this option, for example, when a student is transferring from one academic career to another within your academic institution. The Source Career and Source Institution fields appear and are available.

External Org ID (external organization identification)
For an external transfer credit source, select the external organization from which you are processing transferring credit.

Data Source
For an external transfer credit source, select the data source from which the individuals external transfer credit have been entered into the system. Values for this field are delivered with your system as translate values. You can modify these values.

Source Career
For an internal transfer credit source, select the academic career from which you are processing transfer credit.

Source Institution
For an internal transfer credit source, select the internal academic institution from which you are processing transferring credit.

Transfer Credit Target

Use the grid in the lower portion of the page to enter student ID and target information within your academic institution for each student for whom you want to process transfer credit by batch within the group.

ID
Select the identification code of each student for which you want to process transfer credit in the group. The system prompts you with IDs from the personal data table (PERSONAL_DATA).

Academic Career
Select the academic career to which the specified student's transfer courses will articulate.

Academic Institution
Select the academic institution to which the specified student's transfer courses will articulate.

Academic Program
Select the academic program where this student's transfer in this row credit will articulate.

Academic Plan
Select the academic plan where the specified student's transfer credit in this row will articulate. This field is optional. However, if a academic plan is specified, the individual must be active in that academic plan before the transfer credit is posted.

Articulation Term
Select the term for which you want to process the specified student's transfer credit for this row. Note that it is possible to articulate credits across multiple terms by inserting additional rows for the student. You would do this, for example, if a student has continually taken credit outside your academic institution over time and you have posted credit at each point in time.

Run the Transfer Credit Batch Posting job (SRPCTCBJ) as needed. The job consists of two processes—the Transfer Credit Batch Posting process and the Repeat Rule Driver process (SRPCERTD). Both processes are COBOL/SQL.

Depending on the processing options that you select, the Transfer Credit Batch Posting process does one of the following: creates transfer credit models, posts transfer credit, or creates models and posts transfer credit by batch, for the defined group of students. When you initiate the process with the latter option set, the process will go through the records of each student that you have entered and validate your input parameters, create the transfer credit model, calculate transfer credit articulation, and post the credits to the student's academic career term. Students can be in multiple groups in the same run control process where there is transfer work for multiple institutions.

If you need to change the results, you can do so on a student-by-student basis by editing the transfer credit model that the background process creates. You adjust the results the same way you would adjust them if you were modeling one student at a time. First, unpost the transfer credit. Then, adjust one or more courses manually. Finally, repost the transfer credit.

The Repeat Rule Driver process launches the Repeat Checking process, checking the newly posted course credit on each affected student's career term record against existing course credit to identify repeated courses.

Note. The system uses the begin date of the articulation term as the effective date when validating which equivalency rules are valid.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing IDs"

Viewing Process Results for Batch Posting of Transfer Credit

Access the Process Results page.

Refresh Click to display the messages and description of the process instance. If you rerun the process, click this button to view the messages and descriptions from the most recent run. The system populates the page with the most recent message log information.

Viewing and Printing Transfer Credit Information

This section discusses how to:

- View academic test summaries.
- View schools by group.
- Retrieve transfer credit summaries.
- View and print transfer credit summaries.
- Print transfer credit summaries in batch.

Pages Used to View and Print Transfer Credit Information

Page Name	Object Name	Navigation	Usage
Academic Test Summary	STDNT_TEST_SUMMARY	Manage Student Records, Process Transfer Credit, Inquire, Academic Test Summary, Academic Test Summary	View a summary of academic test information for prospects and applicants, such as test score and data source.
Organization Groups Summary	ORG_GROUP_SUMM	Manage Student Records, Process Transfer Credit, Inquire, Schools By Group, Schools by Group	View schools, or any type of organization, in groups that you designate. You can display the list in the order that you choose.
Selection Criteria	SRTC_RPT_DTL	Manage Student Records, Process Transfer Credit, Inquire, Transfer Credit Summary, Selection Criteria	Define the selection criteria to search for transfer credit summaries.
Selection Result	SRTC_RPT_DTL_RSLT	Manage Student Records, Process Transfer Credit, Inquire, Transfer Credit Summary, Selection Result	View and print transfer credit summaries for individuals. The system displays transfer credit summaries based on your selection criteria on the Selection Criteria page.
Transfer Evaluation Reports	RUNCTL_SR_TRCR_RPT	Manage Student Records, Process Transfer Credit, Report, Transfer Evaluation Report, Evaluation Reports	Print transfer credit summary evaluation reports for multiple individuals at the same time.
Transfer Rules	RUNCTL_SR_TRCRRUL1	Manage Student Records, Process Transfer Credit, Report, Transfer Rules	Generate the Transfer Equivalency Rules report (SR750C-). This report lists all the transfer equivalency rules that have been defined in your PeopleSoft Student Administration system for a given academic institution, including detailed information about each rule. The data for this report can also be viewed using the Course Transfer Rules component. This report lists rules as defined on the Course Transfer Rules page.

Page Name	Object Name	Navigation	Usage
Transfer Subjects	RUNCTL_SR_TRCRRUL1	Manage Student Records, Process Transfer Credit, Report, Transfer Subjects	Generate the Transfer Rule Subject Areas report (SR750D-). This report lists all the component subject areas that have been defined in your PeopleSoft Student Administration system, including detailed information about each component subject area. This report lists component subject areas as defined on the Transfer Subject Area component.

Viewing Academic Test Summaries

Access the Academic Test Summary page.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants

Viewing Schools by Group

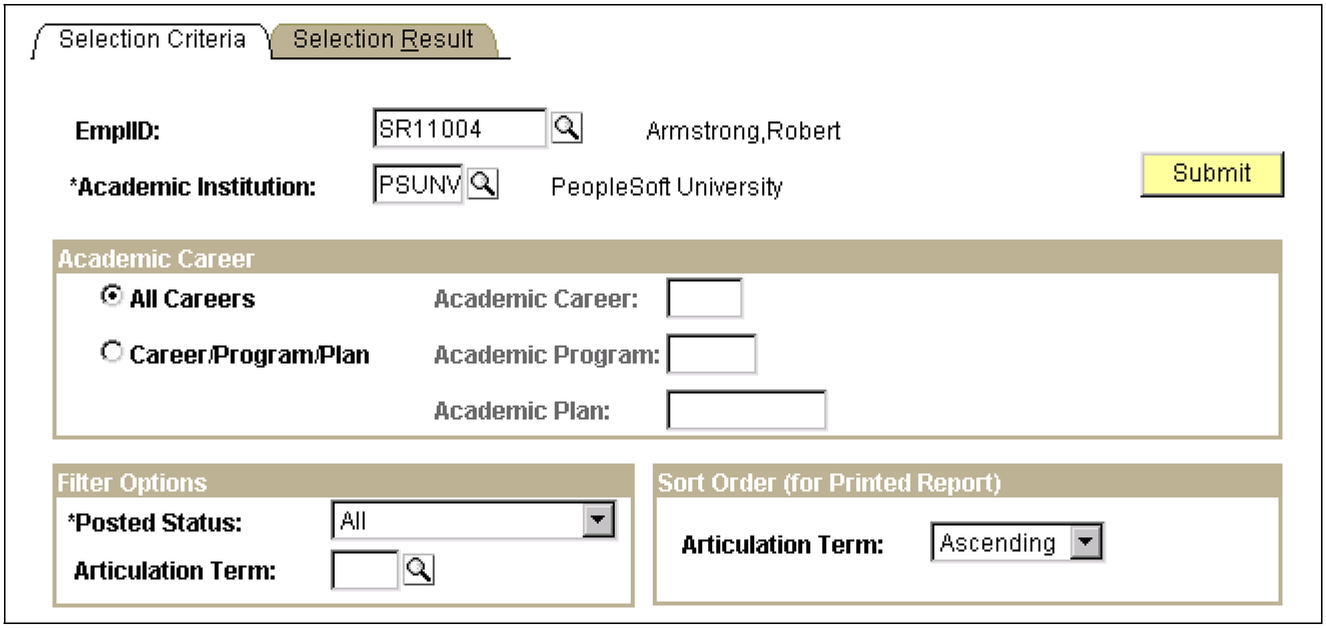
Access the Organization Groups Summary page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Organization Data," Viewing Organizations by Group Types

Retrieving Transfer Credit Summaries

Access the Selection Criteria page.



Selection Criteria inquiry page

EmplID

Select the ID of the individual whose transfer credit summary you want to view or print. The system prompts you with IDs from the personal data table (PERSONAL_DATA).

Academic Institution

Select the academic institution for which the specified individual's transfer credit was processed.

All Careers

Select to retrieve transfer credit summaries for all academic careers associated with the specified individual.

Career/Program/Plan

Select this option to retrieve the specified individual's transfer credit summaries within a specific academic career, target academic program, and target academic plan. The Academic Career, Academic Program, and Academic Planfields become available when you select this option.

Academic Career

Select a specific academic career for which you want to retrieve the specified individual's transfer credit summaries.

Academic Program

Select a specific academic program for which you want to retrieve the specified individual's transfer credit summaries.

Academic Plan

Select a specific academic plan for which you want to retrieve the specified individual's transfer credit summaries.

Posted Status

This filter option enables you to retrieve transfer credit summaries for the specified individual, based on transfer status. Select from the following choices.

All: Enables you to retrieve all transfer credit summaries regardless of transfer status.

Completed: Enables you to retrieve only transfer credit summaries in which transfer credit has been evaluated and models created but the individual does not yet have an academic program, academic plan, and term activation record for the academic program and articulation term as defined on the transfer credit model.

Modeled: Enables you to retrieve only transfer credit summaries in which models have been created.

Posted: Enables you to retrieve transfer credit summaries for transfer credit that have been posted to a student's career term records (STDNT_CAR_TERM table). This differs from the *Completed* status because the individual has an academic program, academic plan, and term activation record for the academic program and articulation term as defined on the transfer credit model.

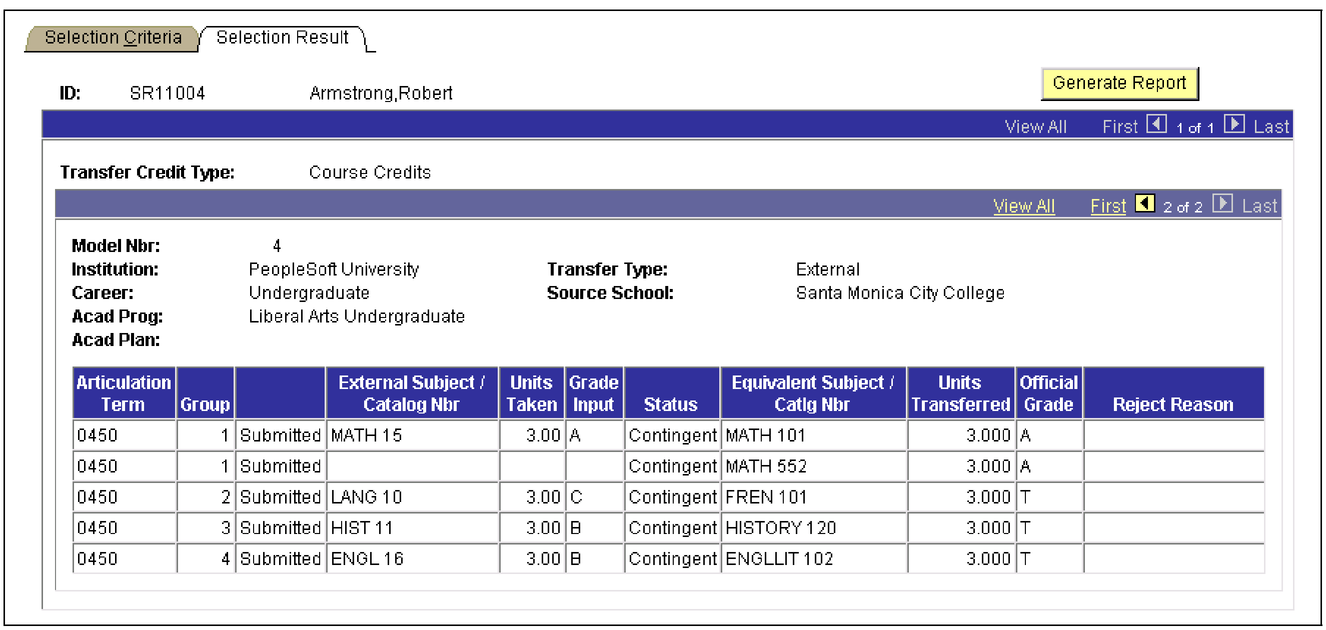
Articulation Term This filter option enables you to select a specific term for which transfer credit has been processed. The system will only display models that have been processed for the articulation term that you specify.

Articulation Term This sort order option enables you to view and print models based on the begin date of the articulation term. There are two options: *Ascending* and *Descending*. *Ascending* prints models from the oldest to the newest articulation term. *Descending* prints models from the newest to the oldest articulation term.

Submit After you have defined your selection criteria and filtering options, click this button to retrieve the transfer credit summaries for the specified individual according to your selection criteria. Once the retrieval process is complete, the system automatically displays the Selection Result page.

Viewing and Printing Transfer Credit Summaries

Access the Selection Result inquiry page.



Selection Criteria | Selection Result

Generate Report

ID: SR11004 Armstrong,Robert

View All First 1 of 1 Last

Transfer Credit Type: Course Credits

View All First 2 of 2 Last

Model Nbr: 4
Institution: PeopleSoft University
Transfer Type: External
Career: Undergraduate
Source School: Santa Monica City College
Acad Prog: Liberal Arts Undergraduate
Acad Plan:

Articulation Term	Group		External Subject / Catalog Nbr	Units Taken	Grade Input	Status	Equivalent Subject / Catlg Nbr	Units Transferred	Official Grade	Reject Reason
0450	1	Submitted	MATH 15	3.00	A	Contingent	MATH 101	3.000	A	
0450	1	Submitted				Contingent	MATH 552	3.000	A	
0450	2	Submitted	LANG 10	3.00	C	Contingent	FREN 101	3.000	T	
0450	3	Submitted	HIST 11	3.00	B	Contingent	HISTORY 120	3.000	T	
0450	4	Submitted	ENGL 16	3.00	B	Contingent	ENGLLIT 102	3.000	T	

Selection Result inquiry page

Generate Report Click to run the SQR report (SRTCSTEV). The report contains the same information as the summary page with the addition of a Repeat field for a student who has already completed course work at the institution. The report is designed in an easy-to-read format intended to be distributed to prospects, applicants, students, recruiters, or advisors. They can see what classes transferred and to which equivalent classes. They can also view their internal and external GPAs.

Important! To print the report, you must first make some changes to your run control definitions.

Articulation Term The articulation term for which the transfer credit was processed.

Group The group number within the model that associates incoming transfer credit and its internal equivalent courses together. The number in this field identifies the group as unique amongst other groups.

Model Status The status of the transfer credit model. There are three possibilities: *Submitted, Completed,* or *Posted.*

External Subject / Catalog Nbr (external subject/catalog number) The external subject and catalog number of the class being transferred.

Units Taken The units that the individual took for the class being transferred.

Grade Input The grade that the individual received for the class being transferred.

Status The transfer status of the credit being transferred. Possible transfer status values are *Accepted, Contingent, Posted, No Rule,* or *Rejected.*

Equivalent Subject / Catlg Nbr (equivalent subject/catalog number) The subject and catalog number of the internal course that is equivalent to the transfer credit.

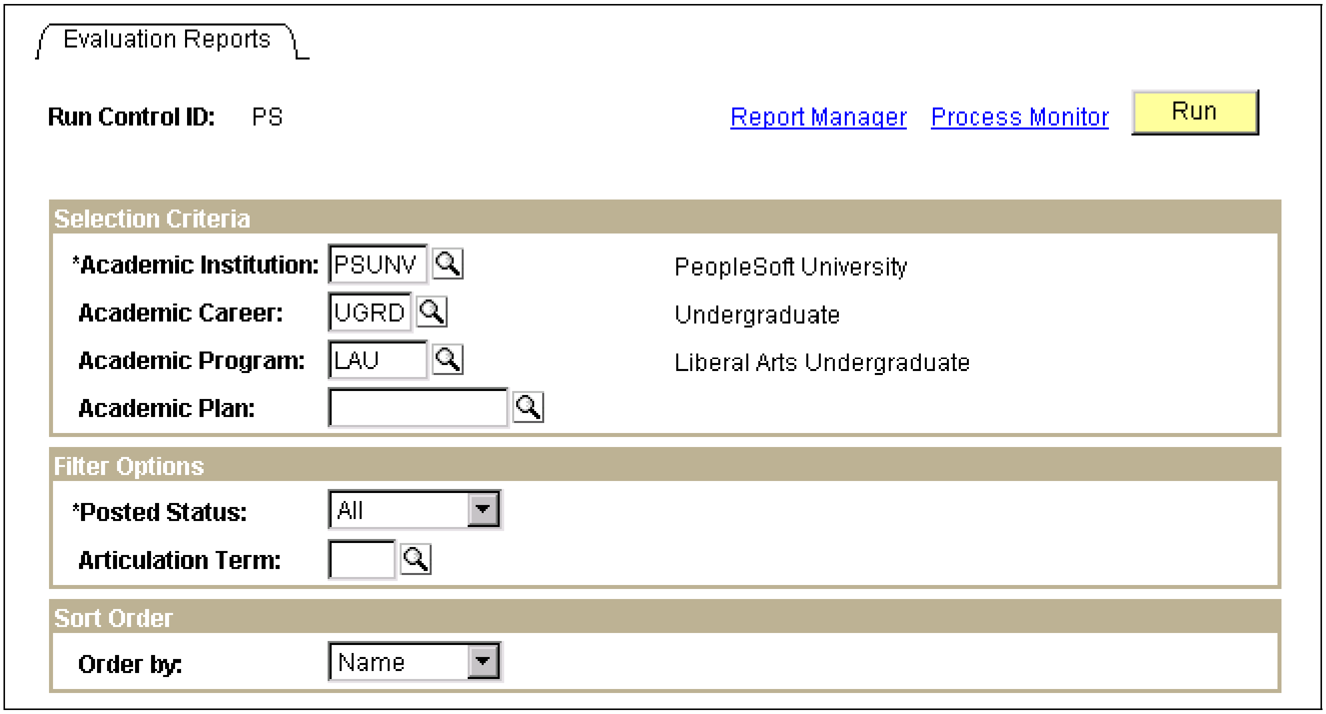
Units Transferred The units of the internal equivalent course.

Official Grade The individual’s official grade for the internal equivalent course.

Reject Reason If the transfer credit was rejected, the system displays the reject reason.

Printing Transfer Credit Summaries in Batch

Access the Transfer Evaluation Reports page.



Evaluation Reports page

Academic Institution
Click to select the academic institution for which transfer credit was processed.

Academic Career
Select a specific academic career for which you want to retrieve the transfer credit summaries.

Academic Program
Select a specific academic program for which you want to retrieve the transfer credit summaries.

Academic Plan
Select a specific academic plan for which you want to retrieve transfer credit summaries.

Posted Status
This filter option enables you to retrieve transfer credit summaries based on transfer status. Select from the following choices.

All: Enables you to retrieve all transfer credit summaries regardless of transfer status.

Completed: Enables you to retrieve only transfer credit summaries in which transfer credit has been evaluated and models created but the individual does not yet have an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model.

Modeled: Enables you to retrieve only transfer credit summaries in which models have been created.

Posted: Enables you to retrieve transfer credit summaries for transfer credit that has been posted to a student's career term records (STDNT_CAR_TERM table). This differs from the *Completed* status because the individual is a matriculated student who has an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model.

Articulation Term This filter option enables you to select a specific term for which transfer credit has been processed. The system will only display models that have been processed for the articulation term that you specify.

Order By In the Sort Order group box, select the order in which you want the system to sort the transfer credit summaries.

Name: The system prints transfer credit summary reports in alphabetical order by last name, first name.

ID: The system prints transfer credit summary reports in ID order.

Submit After you have defined selection criteria and filtering options, click this button to run the Student Transfer Credit Evaluation SQR report (SRTCSTEV), using PeopleSoft Process Scheduler, for the specified individual according to your selection criteria.

Viewing Transfer Credit Reports Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

This section discusses how students can view transfer credit reports through self-service.

Page Used to View Transfer Credit Reports Through Self-Service

Page Name	Object Name	Navigation	Usage
View Transfer Credit Report	SS_TRCR_RPT	SA Self Service, Learner Services, Academics, View Transfer Credit Report	Students can view all of their course, test, and other transfer credit that your academic institution has submitted for posting to their student enrollment records.

Evaluating Transfer Credit Through Self-Service

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services or PeopleSoft Community Access applications, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

This section provides an overview of the Self-Service Modeling Transfer Credit feature and discusses how individuals can use this feature.

Understanding the Self-Service Modeling Transfer Credit Feature

The Self-Service Modeling Transfer Credit feature enables users to enter and process “what-if” course transfer credit evaluations over the internet. Students, applicants, prospects, and visitors can use the Evaluate Transfer Credit self-service pages to create course transfer credit models based on transfer courses from external organizations or from internal academic careers and programs. These individuals can then process their transfer credit models, view their transfer credit evaluation summaries, and use the evaluation results to run what-if degree progress reports.

In addition to what-if courses entered by the student and possible internal courses on the student’s record, the system includes in its degree progress analysis all courses on the individual’s record that are in a “completed” or “posted” transfer model. This way, for prospects and applicants with completed (but not posted) transfer models on file, the system automatically articulates and includes these courses in the what-if degree audit.

Users have access to the Self-Service Modeling Transfer Credit feature based on their role. In the PeopleSoft Community Access collaborative application, visitors—individuals who have not formally applied to your institution—can access the Evaluate Transfer Credit self-service pages once the visitor has been assigned an ID through the Transitioning Visitor to ID feature. In the PeopleSoft Learner Services collaborative application, prospects, applicants, and students can access the Evaluate Transfer Credit self-service pages.

The Self-Service Modeling Transfer Credit feature stores the data it creates in its own tables separate from the tables the Student Records feature uses. This separation ensures the data integrity of official transfer credit records. However, the page elements of the self-service feature prompt against the setup tables of the Student Records Transfer Credit feature, making the setup for the Transfer Credit feature a prerequisite for the self-service feature. Before a user can evaluate transfer credit scenarios, you must define academic institutions, careers, programs, terms, courses, course transfer equivalency rules, and academic program and source equivalencies.

Because the course transfer rules associated with an external organization or internal academic institution are based on effective dates and grade points, the articulation term, external term, external year, unit, and grading information that individuals enter into their models is critical. The self-service pages have onscreen instructions that guide individuals through these data entry requirements so that they can receive accurate information.

Note. Transfer model self-service reports always include both posted and completed transfer models, regardless of the Incl Completed Transfer Models check box setting on the Transcript Type — Basic Data page.

See Also

Chapter 7, “Setting Up Transfer Credit Processing,” page 157

Prerequisites

Before individuals can process self-service transfer credit modelling, you must:

- Set up your system for academic advising.

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, “Getting Started With PeopleSoft Academic Advisement,” Introducing PeopleSoft Academic Advisement.

- Define a transcript type that is available for self-service processing.

See Chapter 13, “Setting Up Transcripts,” Defining Transcript Type Basic Data, page 265.

Pages Used to Evaluate Transfer Credit Through Self-Service

Page Name	Object Name	Navigation	Usage
Evaluate My Transfer Credit	SS_TRCR_SRCH	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to edit or delete an existing course transfer credit model that they have previously created, or begin creating a new model.
Evaluate My Transfer Credit - Welcome	SS_TRCR_WELCOME	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to gain a high-level understanding of the purpose and function of the Self-Service Modeling Transfer Credit feature. Individuals also learn how self-service course transfer credit modeling relates to official course transfer credit processing, and how to navigate the self-service pages.
Transfer Credit Model Information	SS_TRCR_TARGET	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to select the required target information for their course transfer credit model. Target information includes the academic career, program, and plan to which they want to apply the course transfer credit, and the articulation term. To assist individuals in entering this information, the page elements prompt against the academic institution, academic career, academic program, academic plan and term tables.

Page Name	Object Name	Navigation	Usage
Transfer Credit Source Information	SS_TRCR_SOURCE	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to enter the external organization or internal academic institution from which the individual is transferring. To assist individuals in entering this information, the page elements prompt against the course transfer rules tables to ensure that you institution has established a course transfer rule for the external organization or internal academic institution.
Current Coursework	SS_TRCR_INTCR	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals who are creating internal course transfer credit models can use this page to view their coursework for at the specified internal academic institution. The system automatically loads their enrollment information into the page.
Education Data	SS_TRCR_EDUC	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals who are creating external course transfer credit models can use this page to enter their external education information. This information includes the external year and term, term type, external subject area, course number, units taken, and grade received. The system does not uses the education data table to retrieve and store this information. The system instead requires the individual to enter the information, which it then stores on a set of tables unique to the Self-Service Modeling Transfer Credit feature.

Page Name	Object Name	Navigation	Usage
Process Evaluation	SS_TRCR_FETCH	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to run the Self-Service Transfer Credit Evaluation process. The process generates a transfer credit evaluation summary report that the individual can view and use to generate what-if degree progress reports. Before individuals run the process, they have the option to return to previous pages to alter the model information. Once individuals submit a request, the process evaluates their education data against the course transfer rules and program source equivalency tables for the specified source ID.
Transfer Credit Results	SS_TRCR_RSLT	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to view the results of the Self-Service Transfer Credit Evaluation process for the model. The system displays the transfer credit summary report in a grid at the bottom of the page. Individuals can use the browser print function to print the page. Individuals can click the View Details button to see additional information about the incoming courses and their internal equivalents. The evaluation is tentative pending final review by your academic institution.
Transfer Credit Results Detail	SS_TRCR_RSLT_DTL	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to view incoming course and internal equivalent information. The system displays each incoming course beside its internal equivalent course. The system captures but hides the valid attempts, earn credit, and include in GPA fields.

Page Name	Object Name	Navigation	Usage
Process A Degree Progress Report	SS_TRCR_AA_RQST	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to run a degree progress audit report to see how the internal equivalents of their transfer credit model apply towards their degree requirements. The report process combines PeopleSoft Academic Advisement what-if and course list what-if functionality. In PeopleSoft Academic Advisement, you can apply degree requirements to students based on their academic career, program, plan, and subplan. A what-if scenario enables you to select this academic structure information and run a process to see what requirements a student needs for graduation.
Modeling Transfer Credit - View Degree Progress Report	SS_TRCR_AA_RSLT	• SA Self Service, Learner Services, Admissions, Evaluate Transfer Credit • SA Self Service, Learner Services, Academics, Evaluate Transfer Credit • SA Self Service, Community Access, Evaluate Transfer Credit	Individuals can use this page to view the what-if degree progress report, showing them their possible degree progress based on the transfer credit model. For visitors, the process uses the target academic program and internal equivalent courses, which become the what-if courses, during the creation of the degree progress report. For applicants and students, the process uses the target academic program and internal equivalent courses of the model, completed and posted transfer credit models, and enrollment records during the creation of the degree progress report.

CHAPTER 30

Tracking Attendance

This chapter provides an overview of attendance tracking, and discusses how to:

- Generate individual attendance rosters on a class by class basis.
- Generate batch attendance rosters for an entire term, session, and subject area.
- Print attendance rosters.
- Use attendance rosters to track, record, and update attendance.

See Also

Chapter 8, "Setting Up Attendance Tracking," page 199

Understanding Attendance Tracking

Depending on your business requirements, you might need to track student attendance. Some state agencies require institutions to track student attendance by hours or minutes. Often attendance tracking affects funding decisions. Using the PeopleSoft Student Administration Attendance Tracking feature, you can meet these needs. The Attendance Tracking feature enables you to record all of the necessary details regarding a period of interaction between your students and instructors. You can do the following:

- View attendance records online or print them for manual use.
- Track a wide range of attendance statistics, such as late arrivals and time spent in class.
- Track student attendance in a class section, component, or unit of instruction.
- Generate attendance rosters for individual classes or for multiple classes.
- Track student attendance in any type of course, such as traditional courses, remedial courses, contract courses, extension courses, and courses with nontraditional modes of delivery (such as online instruction, modular instruction, open entry and open exit, distance learning, and so on).
- Create attendance rosters for nonclassroom events, such as field trips.

Generating Attendance Rosters

After you schedule classes and enroll students, you can create attendance rosters by using either the Class Attendance page or the Attendance Roster Generator page. Through the Class Attendance page, you can create attendance rosters for one class meeting or for all class meetings within a single scheduled class. Through the Attendance Roster Generator page, you can create attendance rosters for all scheduled classes or for a selection of scheduled classes, within a term.

Each class meeting has its own roster, which comprises the student name and ID, term, session, class section, meeting pattern, attendance date, attendance type, contact hours, and each student's attendance record. The attendance type and the type of student attendance data that you can track are defined on the Course Catalog - Component page. You can use any of these three pages to access the attendance rosters that you generate—each page offers both a different view and a different method of access.

When you generate attendance rosters, the system creates a roster for every scheduled class meeting within your processing parameters and creates a template (a data entry page where you can enter attendance detail for each student) for each class meeting date. You can add new templates, thus adding attendance rosters for class meetings that are not officially scheduled (for example, a field trip to the observatory). For each class meeting, you can view student attendance details. If necessary, you can insert new rows for students who perhaps are not formally enrolled in the class (for example, a student who is participating in the class and planning to enroll if space on the waiting list becomes available).

With either attendance roster generation process (batch or online), you can populate your attendance rosters either by downloading from student enrollment (select the Populate from Student Enroll check box) or by building your attendance rosters from scratch (clear the Populate from Student Enroll check box). If you populate your attendance rosters by downloading from student enrollment, the system populates each roster with student names and IDs. If you choose to build an attendance roster, generate the attendance rosters and the system creates blank templates for each class meeting. Each template has the class attendance date and contact hours, based on the class meeting pattern in the schedule of classes and the class meeting attendance type that your institution uses. You can then use the Class Attendance page to scroll through the class meeting dates, select the specific class meeting dates for which to generate attendance rosters, and populate each of these specific class meeting rosters from student enrollment by clicking the Create button that corresponds to each of these class meetings. You can also enter student IDs by using the Class Attendance page, the Class Attendance By Template page, or the Student Attendance page. Changes that you make on any of these pages are immediately visible in all three components.

After you generate attendance rosters, you can use the Class Attendance page, the Class Attendance By Template page, and the Student Attendance page to track student attendance. Each page provides you with a different view and a different method of access.

Note. You can track events that are not course-related by using the Plan Events component in PeopleSoft Campus Community.

Generating Individual Class Attendance Rosters

Here's how to generate an attendance roster for a single class:

1. Access the Class Attendance page and click the Generate button to generate templates for every class meeting within a scheduled class, or click the Create button to generate a template for a single class meeting.
2. Click the View button to access the Class Attendance Detail page and enter attendance for a specific meeting online.
3. (Optional) Print the roster for an individual meeting by clicking the meeting button.

Prerequisites

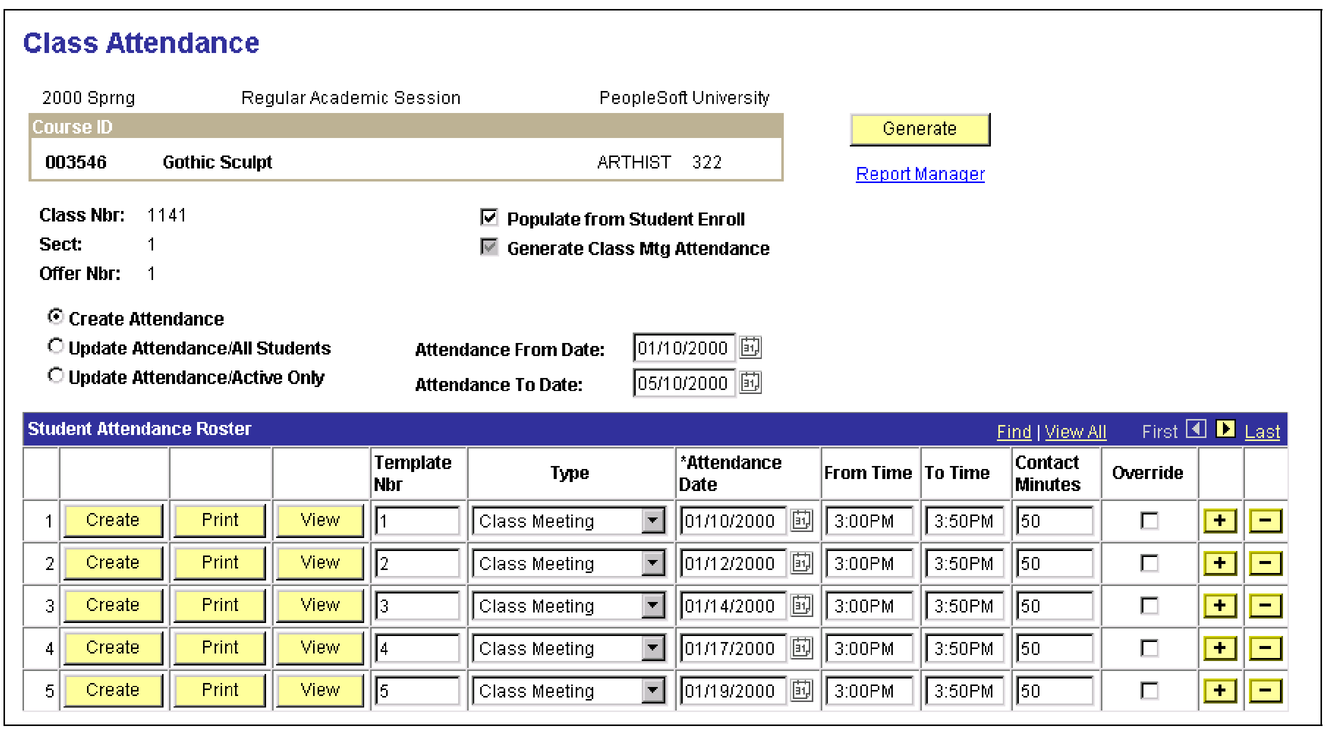
Schedule the class and assign at least one attendance type on the Schedule of Classes - Basic Data page. The classes for which you generate attendance rosters must have scheduled meeting patterns, and the Generate Class Meeting Attendance check box must be selected on both the Course Catalog - Components page and Schedule of Classes - Basic Data page.

Pages Used to Generate Individual Class Attendance Rosters

Page Name	Object Name	Navigation	Usage
Class Attendance	CLASS_ATTENDANCE	Manage Student Records, Establish Courses, Use, Class Attendance, Class Attendance	Generate or update attendance rosters for individual classes and class meetings. You can also use this page to track student attendance and view, update, and print the attendance rosters for each class meeting.
Class Attendance Detail	CLASS_ATTEND_RSTR	Click the View button on the Class Attendance page.	Track student attendance for a class meeting.

Generating Attendance Rosters for Individual Classes

Access the Class Attendance page.



Class Attendance page

When you make changes to attendance rosters by using the Class Attendance page, the system reflects these changes on the Class Attendance By Template page and the Student Attendance page.

Generate	Click to create attendance rosters for all class meetings within this scheduled class. The system populates the grid with templates for each class meeting. When you click the Generate button, it is important to remember that the system always uses the class meeting attendance type defined on the Academic Institution 3 page.
Report Manager	Click to print generated attendance rosters for all class meetings.
Populate from Student Enroll	Select to have the system populate attendance rosters with the enrolled students for every class meeting within this scheduled class when you generate or create attendance rosters. The system selects this check box by default. If you clear this check box and click the Generate button, the system creates blank attendance rosters for every class meeting. You can then scroll through the class meeting dates in the grid located in the lower portion of the page, select the View link for the specific class meeting dates for which to track attendance, and manually enter student IDs.
Processing Options	Select one of the three radio buttons to specify the type of process to run. These work in concert with the Generate button only. These do not work in concert with the Create button. Your choices are the following: *Create:* Use when you want to create new rosters or replace old ones. *Update Attendance/All Students:* Use to add, but not delete students from the specified group of rosters. Students who have dropped are set to inactive status by having the Present flag set to Off. The system adds new students to the rosters, but only marks these students as present for the class sessions that occur after the add date. *Update Attendance/Active Only:* Use to add and delete students from the roster based on their current enrollment status in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how rosters are updated. Use this option when a student drops a class and you want to remove the student and leave no attendance history.
Attendance From Date and **Attendance To Date**	Use the Attendance From Date and the Attendance To Date fields to specify the range of rosters to update. These fields appear only for classes where the Generate Class Meeting Attendance check box is selected on the Components and Basic Data pages. If displayed, the system populates the fields with the class begin and end date, as specified on the schedule of classes. You can change these values. If you manually change the attendance from and to date range, the system creates or updates rosters for meetings that are greater than or equal to the Attendance From Date field and less than or equal to the Attendance To Date field.

Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career and would thus appear on the attendance record twice.

If students add, drop, or change their personal data in a class after you have generated the attendance roster, you can use the Create button to generate new attendance rosters. Provided that you select the Populate from Student Enroll check box, the system generates new rosters that include these changes. You can also use the Create button to generate new attendance rosters when the class meeting pattern in the schedule of classes changes. For example, perhaps the class meeting time is rescheduled from 8:00 a.m. to 9:00 a.m., or class meeting dates are changed from *MWF* to *TR.* You can regenerate the class meeting attendance rosters to reflect the new date or time.

Warning! The Generate button always functions as though you are generating attendance rosters from scratch. Therefore, if you have already entered student attendance data into any of the attendance rosters, you should use the Create button associated with each individual attendance roster template. You should *not* use the Generate button or you will lose the attendance data that you have already entered into the rosters.

Generate Class Mtg Attendance (generate class meeting attendance)

This check box is a display only check box on this page and is set on the Schedule of Classes - Basic Data page. It determines whether the class can be included in batch roster generation, and it affects which radio buttons, from date, and to date fields appear.

Create

Click this button on the corresponding meeting row to generate or regenerate an attendance roster for that class meeting row. The system automatically populates the template by downloading data from student enrollment regardless of whether you select the Populate From Student Enroll check box.

You can use the Create button to generate attendance rosters that you enter manually, to generate attendance rosters for additional class meetings that are not formally scheduled, and to update attendance rosters with the latest student enrollment and personal data.

To generate attendance rosters manually, enter the attendance information into a row and click the corresponding Create button. For example, perhaps your institution wants to track attendance for milestone periods within a class such as the 30 percent and 70 percent periods.

To generate attendance rosters for additional class meetings, press the Add button to insert a new row anywhere in the grid, then enter the necessary attendance information, and click the corresponding Create button. For example, perhaps you have added a field trip to the course.

To update attendance rosters with the latest enrollment data, you first must select the Override check box on a row within the grid. Then, click the Create button for that row. You do not need to select the Populate from Student Enroll check box, because it works in conjunction with the Generate button. You might update attendance rosters when students have added or dropped the class or when there has been a change to student personal data, such as their first name or last name. You can also use the Generate button to update enrollment information for all class meetings of the scheduled class rather than changing just one class meeting. However, you should only use the Generate button *before* you manually enter attendance data into your rosters because it creates new rosters, overwriting and replacing existing information.

Print

Click the Print button on a data row to print an attendance roster for a specific class meeting. This Crystal report process automatically creates a web output in portable document format (PDF).

Click the Report Manager link to access and print the roster.

View

Click this button on a data row to view and enter information for an attendance roster.

Template Nbr (template number)

The system generates a template number for each class meeting of the scheduled class. The template number identifies each attendance roster as unique and also denotes the order in which the system prints the attendance rosters. When you change a template number and save the page, the next time that you access the page the system positions the template numbers in numerical order.

Type

Indicates the roster attendance type for the class meeting, such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.* The attendance type determines which attendance tracking fields the system uses for the attendance roster. When you generate attendance rosters the first time for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the default attendance type value from the Academic Institution 3 page. If you want to use an attendance type value other than the default, change the value in the Type field for each attendance roster template. When you exit the field, the system makes the change and updates the fields that appear on the roster (according to the selected options for this particular course component and attendance type on the Components page). Values for this field are delivered with your system as translate values. You can modify these values. This is a required field.

To use attendance types, define the attendance types and their associated fields for course components on the Components page.

See Chapter 8, “Setting Up Attendance Tracking,” Defining Attendance Type Translate Values, page 200.

The system displays the *Attendance Date, From Time, To Time,* and *Contact Minutes* for each class meeting on both the detail and summary rows of a class meeting attendance roster template. When you generate attendance rosters for all class meetings within a scheduled class, either by using the Class Attendance page or the Attendance Roster Generator page, the system assigns each attendance roster these four values based on the class meeting pattern in the schedule of classes. When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must assign these values manually.

Attendance Date Indicates the date of the class meeting. You can change this value. This field is required.

From Time Designates the start time of the class meeting. This field appears on attendance rosters of this course component only when you have selected the Use To and From Time check box for the attendance type on the Components page. You can change this value.

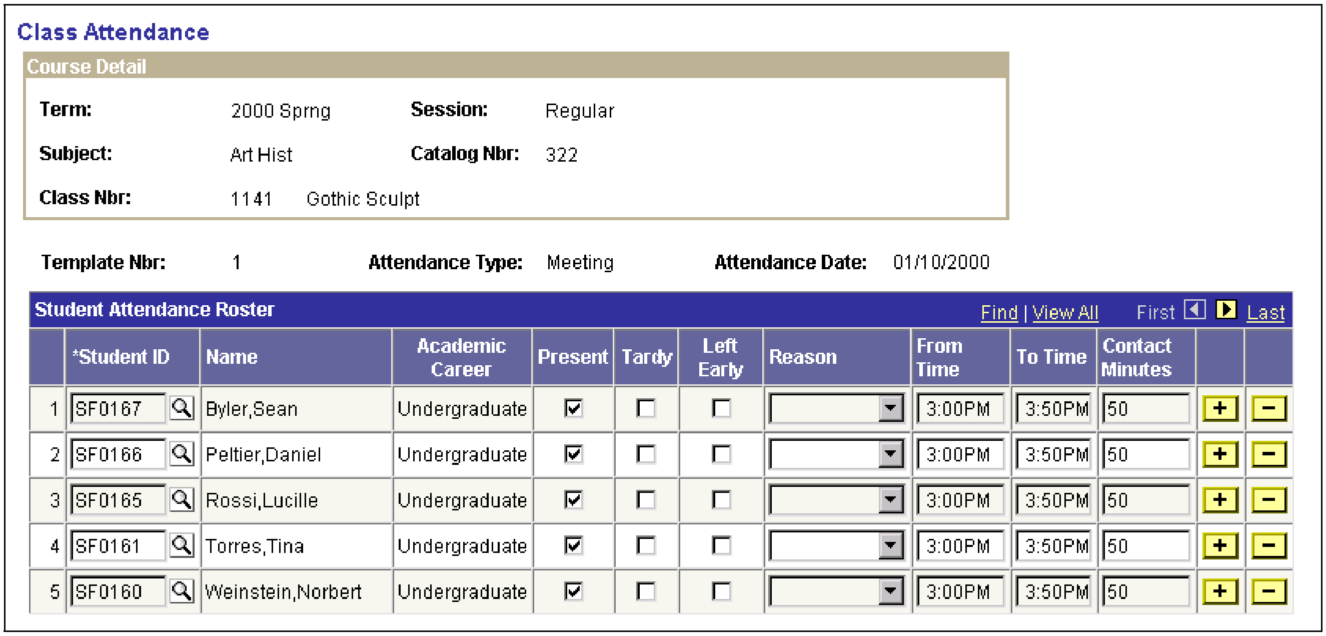
To Time Designates the end time of the class meeting. This field appears on attendance rosters of this course component only when you have selected the Use To and From Time check box for the Attendance Type on the Components page. You can change this value.

Contact Minutes Indicates the total length of the class meeting in minutes and is the difference between the to time and from time values. This field appears on attendance rosters of this course component only when you have selected the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.

Override Select the check box if you want to update an existing attendance roster with the latest student enrollment information and personal data. By then clicking the Create button on the same row, the system generates new attendance rosters that contain the latest student enrollment information and personal data and overwrites the previous roster. You can use this check box, for example, if you have already generated class meeting attendance rosters and then students enroll in the course, drop from the course, or change their personal data.

Entering Class Attendance Detail

Access the Class Attendance Detail page.



Class Attendance

Course Detail

Term: 2000 Sprng **Session:** Regular

Subject: Art Hist **Catalog Nbr:** 322

Class Nbr: 1141 Gothic Sculpt

Template Nbr: 1 **Attendance Type:** Meeting **Attendance Date:** 01/10/2000

Student Attendance Roster Find | View All First Last

	*Student ID	Name	Academic Career	Present	Tardy	Left Early	Reason	From Time	To Time	Contact Minutes		
1	SF0167	Byler,Sean	Undergraduate	☑	☐	☐		3:00PM	3:50PM	50	+	−
2	SF0166	Peltier,Daniel	Undergraduate	☑	☐	☐		3:00PM	3:50PM	50	+	−
3	SF0165	Rossi,Lucille	Undergraduate	☑	☐	☐		3:00PM	3:50PM	50	+	−
4	SF0161	Torres,Tina	Undergraduate	☑	☐	☐		3:00PM	3:50PM	50	+	−
5	SF0160	Weinstein,Norbert	Undergraduate	☑	☐	☐		3:00PM	3:50PM	50	+	−

Class Attendance Detail page

Student ID and **Name**

The system displays the ID and name of each student enrolled in the class when you generate attendance rosters and opt to have the system populate from data from student enrollment. If you generate rosters and do not select the Populate from Student Enroll check box, you can enter the IDs manually and the system displays each student's name in the Name field once you exit the Student ID field. Insert rows to add students who are not formally enrolled in the class to the class meeting attendance roster; delete rows to remove students from the class meeting attendance roster. Adding students to the roster does not enroll them in the class. It is for personal tracking only.

Warning! If you entered attendance data into your rosters and you want to add or remove a student from the attendance roster for class meetings (because the student has recently enrolled in or dropped from the class), you can add or remove them from the roster manually, or you can use the Create button on the corresponding class meeting template (with the Override check box selected). This generates a new attendance roster for one class meeting with the latest student enrollment information. Generating attendance rosters by clicking the Generate button in the upper portion of the page creates new attendance rosters for all the class meetings. You would therefore lose any attendance data you have already entered into the rosters.

Academic Career

The system displays the academic career of the student. This is useful if you track the types of students who enroll in classes, such as how many undergraduate students are in a class compared to how many graduate students.

Present

Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component only if you select the Use Present check box for this class meeting's attendance type on the Components page.

Tardy	Select to indicate that the student arrived late to the class meeting. This field appears on the attendance rosters of this course component only if you select the Use Tardy check box for this class meeting's attendance type on the Components page.
Left Early	Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component only if you select the Use Left Early check box for this class meeting's attendance type on the Components page.
Reason	Select a reason to describe a student's reason for being present, being tardy or leaving early. This field appears on the attendance rosters of this course component if you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.
From Time	Indicates the time that the student arrived at the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters, and you can only change the from time to a value that falls within the template's time range.
To Time	Indicates the time that the student left the class meeting. This field appears on attendance rosters of this course component if you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the To Time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the Template define the parameters of the From Time and To Time fields on the attendance roster and you can only change the to time to a value that falls within the template's time range.
Contact Minutes	Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component if you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.
Attendance Date	Indicates the date on which the student attended the class meeting. This field appears on attendance rosters of this course component if you select the Override Template Date/Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the attendance date on a student-by-student basis. Otherwise, the attendance date for the template defines the value for the Attendance Date field.

Generating Batch Attendance Rosters

This section provides an overview of batch attendance roster generation, and discusses how to generate attendance rosters in batch mode.

Understanding Batch Attendance Roster Generation

The following list discusses some of the reasons why you would need to run the batch attendance roster generation process:

- Create new rosters or update existing rosters based on a certain date range.
- Update rosters because students add or drop classes after you generate the initial rosters.
- Update the roster with only newly added students and keep on record those students who have dropped or withdrawn from classes.

Here's how to generate attendance rosters in batch:

1. Access the Attendance Roster generator page and specify your run parameters.
2. Click the Roster Options link to access the Roster Generator Options page where you can specify roster options for a specific sequence item in your run control set.
3. Click the Run button on the Attendance Roster generator page.

Prerequisites

Before you can generate attendance rosters in batch, you must:

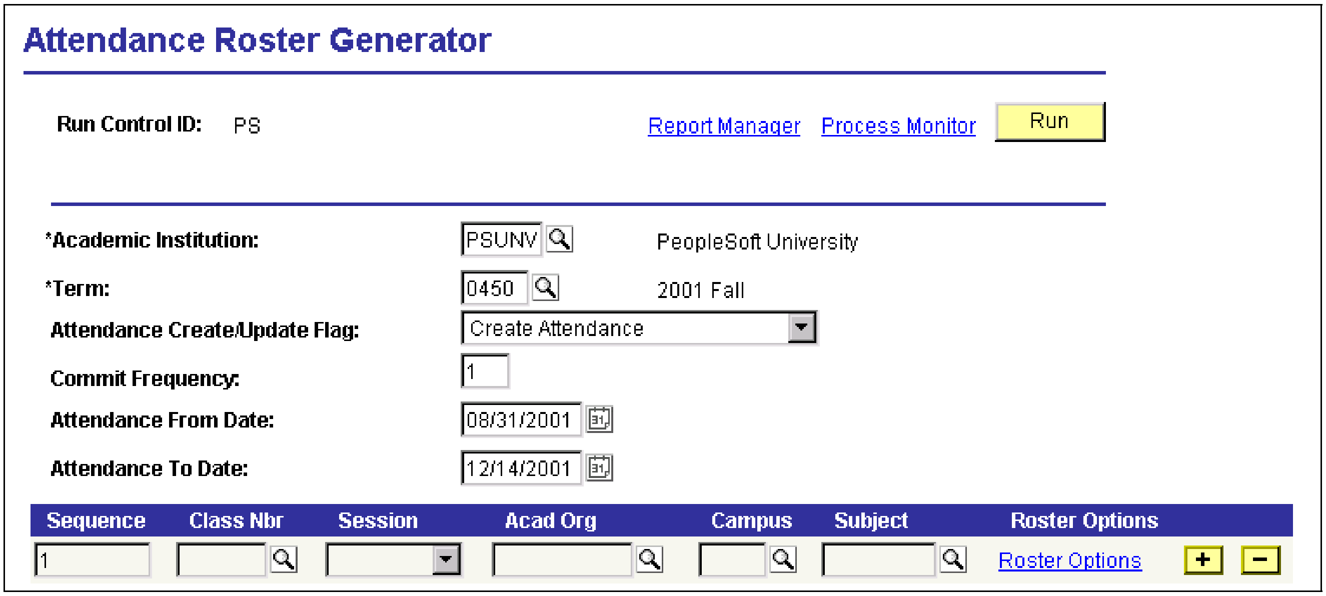
- Define scheduled meeting patterns for the classes you generate attendance rosters.
- Select the Generate Class Meeting Attendance check box on the Course Catalog - Components page.
- Select the Generate Class Meeting Attendance check box on the Schedule of Classes - Basic Data page.

Pages Used to Generate a Batch of Attendance Rosters

Page Name	Object Name	Navigation	Usage
Attendance Roster Generator	RUNCTL_SRPCATNP	Manage Student Records, Establish Courses, Process, Attendance Roster Generator	Create or update attendance rosters for multiple classes within a term, based on the criteria and options you select.
Roster Generator Options	ATT_ROS_GEN_SEC	Click the Roster Options link on the Attendance Roster Generator page.	Narrow your processing parameters.

Running the Attendance Roster Generator Process

Access the Attendance Roster Generator page.



Attendance Roster Generator page

Academic Institution

The institution for which to generate rosters. The system populates this field with the value from the User Defaults 1 page, which you can change. This field is required.

Term

Select the term that contains the classes for which to generate attendance rosters. Term values are defined on the Term Table page.

Attendance Create/Update Flag

Use this field to specify a default for the same field on the Roster Generator Options page. This is a default that you can change on a row-by-row basis by clicking the Roster Options link in the grid. Your choices for the default are the following:

Create Attendance: Use when you want to create new rosters or replace old ones.

Update Attendance/Active Only: Use to add and delete students from the roster, based upon their current enrollment status in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how the system updates rosters. Use this option when a student drops the class and you want to remove the student and leave no attendance history.

Update Attendance/All Students: Use to add, but *not* delete students from the specified group of rosters. Students who have dropped will be made inactive by having their Present flag set to *Off.* New students will be added to the rosters, but they can only be marked as present or otherwise for the class sessions that occur after the add date.

Commit Frequency

The system populates the commit frequency field with *1* by default. The lower the commit frequency, the better concurrence of data. While a higher commit frequency enables faster processing of the job, the job could get tied up with another process. PeopleSoft recommends that you leave the commit frequency at *1.*

Attendance From Date and **Attendance To Date**

Use these fields to specify defaults for the grid below them. These values determine which rosters the process updates. If you do not specify a default, the system sets the values in the grid to the length of each class as defined on the schedule of classes, enabling you to update all of the term's rosters (like a wild card). If you manually specify a separate attendance from date and to date range on the Roster Generator Options page, the process only updates class rosters for dates that are greater than or equal to the Attendance From Date field and less than or equal to the Attendance To Date field.

Use the fields in the grid, and click the Roster Options link, to indicate specific criteria for each sequence number. The system uses this detail to determine which attendance rosters it generates when you run the process. Select as many selection criteria as necessary. Insert rows as needed. Your choices are the following:

Sequence

The system sets the sequence number to *1* and increases it by one for each row that you add to the request. The number specifies the order in which the system processes class attendance rosters.

Class Nbr (class number)

Enter the class number for which to generate attendance rosters. The system prompts you with the classes that are defined in the schedule of classes for the term. After you enter the class number, exit the field and the system populates and hides some of the remaining fields on both the Attendance Roster Generator page and the Roster Generator Options page.

Session

Select the session for which to generate attendance rosters. The system prompts you with the sessions that are defined for the term. Values for this field are delivered with your system as translate values. You can modify these values.

Acad Org (academic organization)

Select the academic organization for which to generate attendance rosters. Academic organization values are defined on the Academic Organization Table page.

Campus

Select the campus for which to generate rosters. Campus values are defined on the Campus Table page.

Subject

Select the subject area for which to generate the rosters. Subject area values are defined on the Academic Subject Table page.

Roster Options

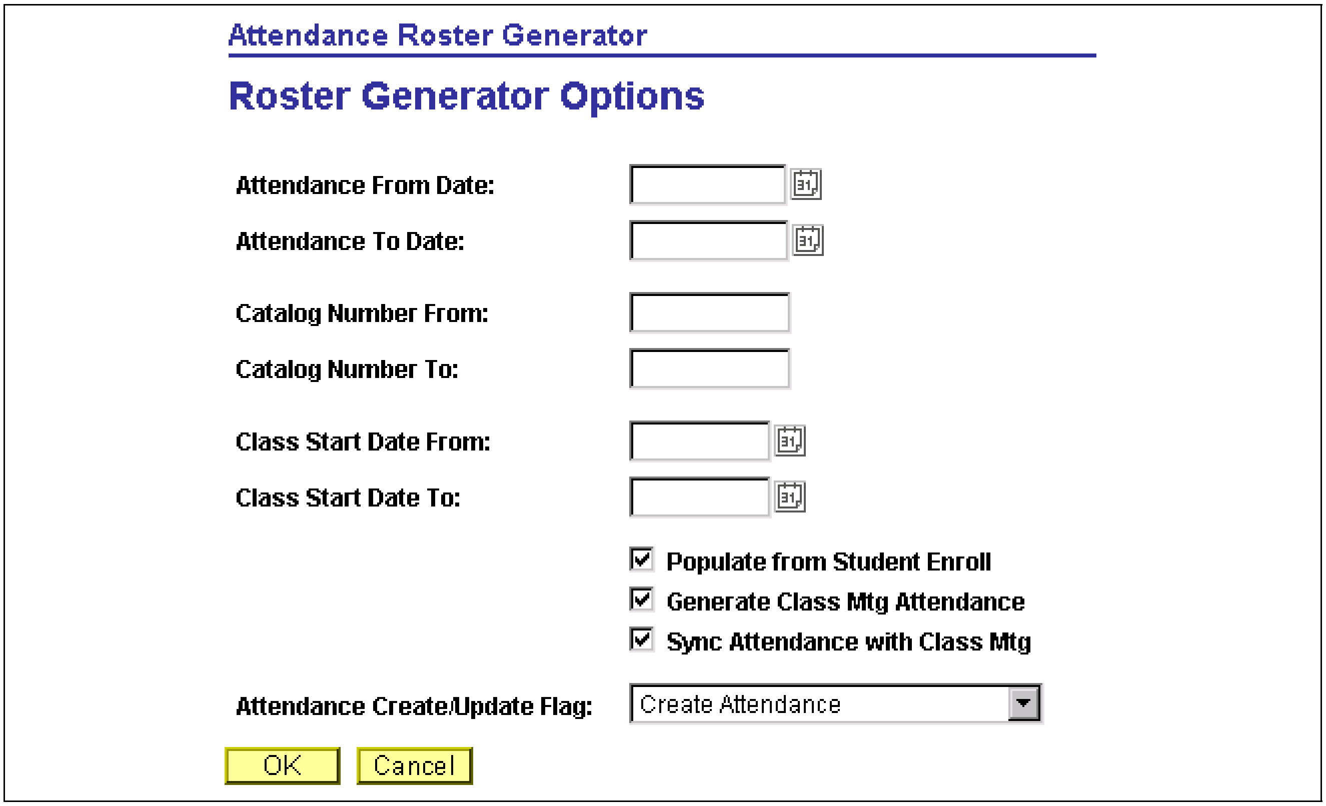
Click to access the Roster Generator Options page, where you can further specify your processing parameters for each sequence number.

Note. Because your institution can define multiple meeting attendance types for a course in the course catalog, the system uses the class meeting attendance type on the Academic Institution 3 page for all attendance rosters that you generate by using the Attendance Roster Generator page. The attendance type indicates the type of attendance roster, such as Class Meeting, Conference, Field Trip, Instructor Consultation, or Study Group. If you want to create attendance rosters with different attendance types from that of the default, change the value for individual class meetings on the Class Attendance page and Class Attendance By Template page, or you can change it for individual students on the Student Attendance page.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRATTEND process at user-defined intervals. Once the process completes, the system makes the row unavailable but continues to display the processing parameters so that you can view a history of what you have done. These rows have no impact on future processing. You can press the Delete button to delete them.

Entering Roster Generator Options

Access the Roster Generator Options page.



Roster Generator Options page

Attendance From Date and **Attendance To Date**	Use these fields to specify the range of rosters to create or update. Only class rosters that are for dates greater than or equal to those in the Attendance From Date field and less than or equal to those in the Attendance To Date field are updated. If you do not specify a value, the system sets the fields to the values on the Attendance Roster Generator page. If you do not specify from and to dates on either the Attendance Roster Generator page or the Roster Generator Options page, the system sets the values to the length of each class as defined on the schedule of classes. This enables you to update all of the term's rosters.
Catalog Number From and **Catalog Number To**	If you have a specific range of catalog numbers within a subject area for which to generate rosters, enter a value in the Catalog Number From and Catalog Number To fields.
Class Start Date From and **Class Start Date To**	If you have a specific start date range for which to generate attendance rosters, enter a value in the Class Start Date From and Class Start Date To fields. If you enter an individual class number in the grid on the Attendance Roster

Generator page, the system hides these fields *and* populates them with the class start date from the Schedule of Classes - Meetings page.

Populate From Student Enroll

Select to have the system populate attendance rosters with the enrolled students for every scheduled class meeting that matches your processing criteria. The system selects this check box by default. If you clear this check box, the system still creates attendance rosters for every class meeting but you will have to manually enter the students and their enrollment data into the rosters.

Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career, and would thus appear on the attendance record twice.

Generate Class Mtg Attendance (generate class meeting attendance)

Select to have the system generate or regenerate attendance rosters only for classes in which you select the Generate Class Mtg Attendance (generate class meeting attendance) check box on the Schedule of Classes - Basic Data page. The system selects this check box by default on the Roster Generator Options page. If you clear this check box, the system generates attendance rosters for all scheduled classes matching your processing criteria, regardless of how the Generate Class Mtg Attendance check box is set on the Schedule of Classes - Basic Data page.

Sync Attendance with Class Meeting (synchronize attendance with class meeting)

When you run the attendance roster generator process, you can update all rosters within your parameters or update only those that have had meeting pattern changes since the original rosters were generated. To update changed rosters, select the Sync Attendance with Class Meeting check box. To update all rosters (even if a roster has had no changes), clear the Sync Attendance with Class Meeting check box.

Attendance Create/Update Flag

Use to specify the type of roster to generate for this sequence number. The system populates this field with the value specified on the Attendance Roster Generator page, but you may change it on a row-by-row basis. Your choices are the following:

Create Attendance: Use when you want to create new rosters or replace old ones.

Update Attendance/Active Only: Use to add and delete students from the roster, based on their current enrollment status in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how rosters are updated. Use this option when a student drops the class and you want to remove the student and leave no attendance history.

Update Attendance/All Students: Use to add, but *not* delete students from the specified group of rosters. Students who have dropped are set to inactive status by having the Present flag set to *Off.* The system adds new students to the rosters, but only marks these students as present for the class sessions that occur after the add date.

Printing Attendance Rosters

Once you have generated rosters, click the Print button on the Class Attendance page to create and print the Class Attendance report as a PDF file.

See Also

Chapter 30, "Tracking Attendance," Generating Individual Class Attendance Rosters, page 674

Using Attendance Rosters

Once you create your attendance rosters, you can access them to track student attendance. This section provides an overview of this access, and discusses how to:

- Access all attendance rosters associated with a course ID and course offering number through the Class Attendance page.
- Access the attendance roster for a single class meeting by template number, attendance type, and attendance date through the Class Attendance by Template page.
- Access rosters by student ID and class number through the Student Attendance page.

You can, with the check of a box, mark for each class meeting whether a particular student is present, tardy, or leaves early. You can even enter the reason. You can also enter the exact time that the student is in attendance, the contact minutes, and attendance date. The system updates all three previously mentioned pages with the changes. If your institution collects data on paper, or if you prefer to track attendance on paper, you can print your attendance rosters and enter the data into the system at a later time.

Prerequisites

Before you can record attendance, you must generate the attendance roster.

Pages Used to Record Attendance

Page Name	Object Name	Navigation	Usage
Class Attendance	CLASS_ATTENDANCE	Manage Student Records, Establish Courses, Use, Class Attendance, Class Attendance	Track student attendance by accessing attendance rosters for individual classes. For each class meeting, you can view, enter, update, and print the corresponding attendance roster. You can also generate attendance rosters for classes and class meetings.
Attendance Tracking by Template	ATTEND_TRACKING_1	Manage Student Records, Establish Courses, Use, Class Attendance by Template, Attendance Tracking By Template	View, enter, and change data on a class meeting basis.
Student Attendance	STDNT_ATTND_SRCH	Manage Student Records, Manage Academic Records, Use, Student Attendance, Student Attendance	Track an individual student's attendance in a class. You can view, enter, modify, and delete the student's existing attendance data. The student must be enrolled in the class or manually added to the attendance roster.

Tracking Attendance by Class

Access the Class Attendance page.

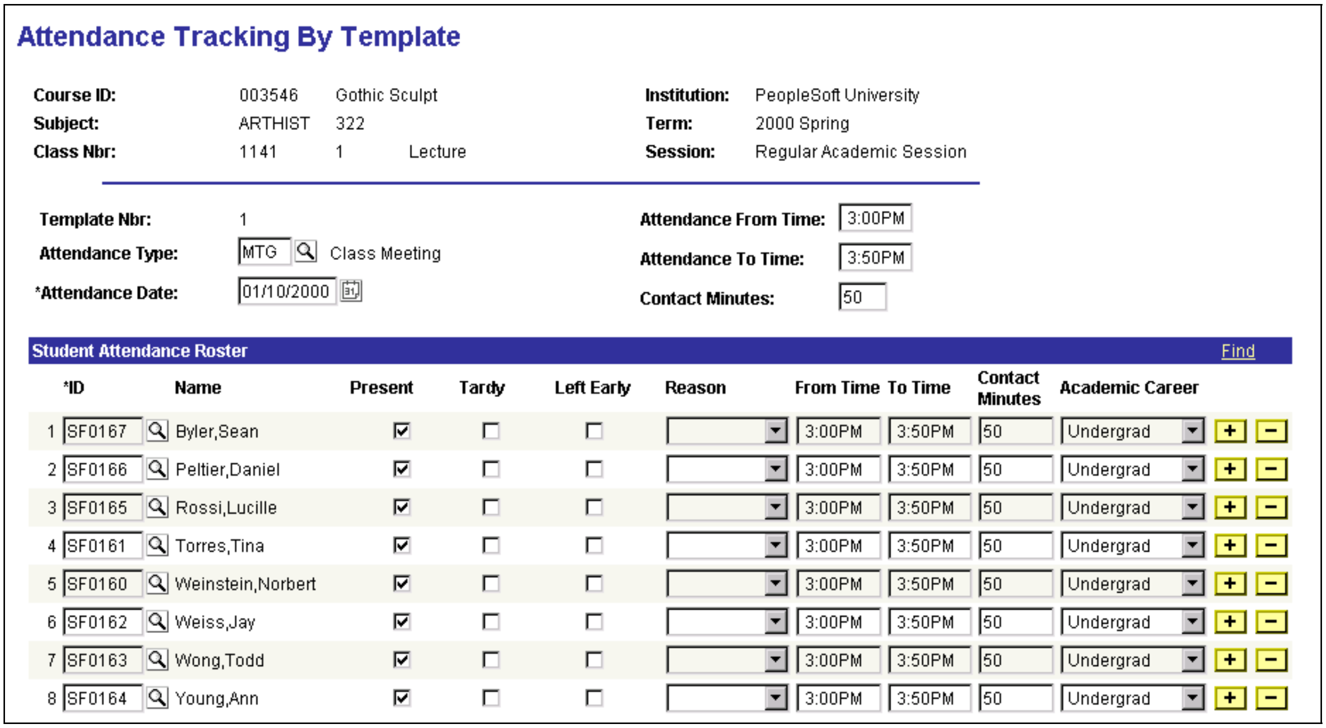
Use the Class Attendance page to track student attendance by accessing attendance rosters for individual classes. For each class meeting, you can view, enter, update, and print the corresponding attendance roster. You can also generate attendance rosters for classes and class meetings.

See Also

Chapter 30, "Tracking Attendance," Generating Individual Class Attendance Rosters, page 674

Tracking Attendance by Class Meeting

Access the Attendance Tracking By Template page.



Attendance Tracking By Template

Course ID: 003546 Gothic Sculpt
Subject: ARTHIST 322
Class Nbr: 1141 1 Lecture
Institution: PeopleSoft University
Term: 2000 Spring
Session: Regular Academic Session

Template Nbr: 1
Attendance Type: MTG Class Meeting
*Attendance Date: 01/10/2000
Attendance From Time: 3:00PM
Attendance To Time: 3:50PM
Contact Minutes: 50

Student Attendance Roster Find

	*ID	Name	Present	Tardy	Left Early	Reason	From Time	To Time	Contact Minutes	Academic Career
1	SF0167	Byler,Sean	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
2	SF0166	Peltier,Daniel	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
3	SF0165	Rossi,Lucille	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
4	SF0161	Torres,Tina	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
5	SF0160	Weinstein,Norbert	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
6	SF0162	Weiss,Jay	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
7	SF0163	Wong,Todd	☑	☐	☐		3:00PM	3:50PM	50	Undergrad
8	SF0164	Young,Ann	☑	☐	☐		3:00PM	3:50PM	50	Undergrad

Attendance Tracking By Template page

Changes made here are immediately visible on the Class Attendance page and the Student Attendance page.

Template Number

The system displays the template number for the class meeting. The template number uniquely identifies each class meeting attendance roster.

Attendance Type

Indicates the attendance type for the class meeting, such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.* These attendance types determine which fields the system uses for your attendance roster. When you generate attendance rosters for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the class meeting attendance type value from the Academic Institution 3 page. If you want to use attendance type values other than the default, you can change the Attendance Type field value for an individual attendance roster template. When you exit the field, the system makes the change online and updates the roster fields in accordance with the options for this particular course component and attendance type, as set on the Components page. Values for this field are delivered with your system as translate values. You can modify these values. This is a required field.

To use attendance types, your must first define the attendance types and their associated fields for the course component on the Components page.

When you generate attendance rosters for all class meetings within a scheduled class, (either by using the Class Attendance page or the Attendance Roster Generator page), the system assigns each attendance roster with the following four field values (based on the class meeting pattern of the class in the Schedule of Classes). When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must manually assign the following four field values:

Attendance Date	Indicates the date of the class meeting. You can change this value.
Attendance From Time	Designates the start time of the class meeting. This field appears on the class meeting attendance roster when you select the Use To and From Time check box for the attendance type on the Components page. You can change this value.
Attendance To Time	Designates the end time of the class meeting. This field appears on the class meeting attendance roster only when you select the Use To and From Time check box for the attendance type on the Components page. You can change this value.
Contact Minutes	Indicates the total length of the class meeting in minutes and is simply the difference between the to time and from time values. This field appears on the class meeting attendance roster when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.
ID and **Name**	The system displays the ID and name of each student that is enrolled in the class when you generate attendance rosters and opt to have the system populate the roster from student enrollment. Otherwise, you can enter the IDs manually and the system displays each student's name in the Name field once you exit the ID field. Insert rows to add to the class meeting attendance roster students who perhaps are not formally enrolled in the class; delete rows to remove students from the class meeting attendance roster. Adding rows does not enroll or drop students. This is for tracking nonenrolled students only.
Present	Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component when you select the Use Present check box for this class meeting's attendance type on the Components page.
Tardy	Select to indicate that the student arrived late to the class meeting. This field appears on the attendance rosters of this course component when you select the Use Tardy check box for this class meeting's attendance type on the Components page.
Left Early	Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component when you select the Use Left Early check box for this class meetings Attendance Type on the Components page.
Reason	Enter a reason to describe a student's reason for being present, tardy, or leaving early. This field appears on the attendance rosters of this course component when you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.
From Time and **To Time**	Indicates the time that the student arrived and left the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from or to time value on

a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters. You can change the from and to time value to a time that falls only within the template's time range.

Contact Minutes

Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.

Attendance Date

Indicates the date on which the student attended the class meeting.

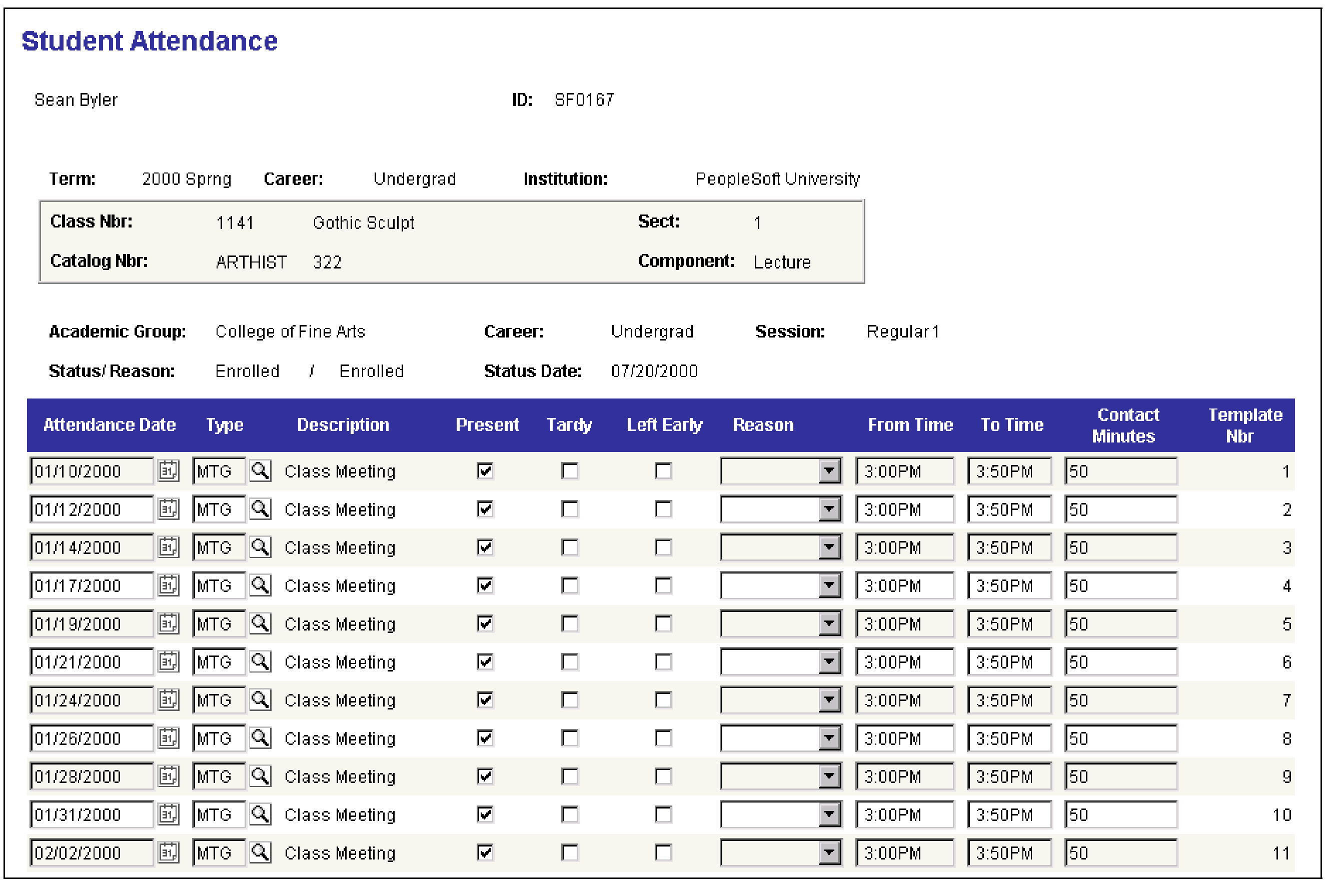
Academic Career

The system displays the academic career of the student. This is useful for tracking the types of students who enroll in a class, such as how many undergraduate students are in a class as compared to graduate students.

Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career and would thus appear on the attendance record twice.

Tracking Attendance by Student

Access the Student Attendance page.



Student Attendance

Sean Byler ID: SF0167

Term: 2000 Sprng Career: Undergrad Institution: PeopleSoft University

Class Nbr: 1141 Gothic Sculpt Sect: 1

Catalog Nbr: ARTHIST 322 Component: Lecture

Academic Group: College of Fine Arts Career: Undergrad Session: Regular 1

Status/ Reason: Enrolled / Enrolled Status Date: 07/20/2000

Attendance Date	Type	Description	Present	Tardy	Left Early	Reason	From Time	To Time	Contact Minutes	Template Nbr
01/10/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	1
01/12/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	2
01/14/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	3
01/17/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	4
01/19/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	5
01/21/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	6
01/24/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	7
01/26/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	8
01/28/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	9
01/31/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	10
02/02/2000	MTG	Class Meeting	☑	☐	☐		3:00PM	3:50PM	50	11

Student Attendance page

Attendance Date Indicates the date on which the student attended the class meeting. This field appears on attendance rosters of this course component only when you select the Override Template Date/Time check box for the Attendance Type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can edit the Attendance Date field value. Otherwise, the attendance date for the template defines the value for the Attendance Date field on the attendance rosters.

Type Indicates the attendance type for the class meeting, such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.* These attendance types determine which fields the system uses for your attendance roster. When you generate attendance rosters for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the class meeting attendance type value from the Academic Institution 3 page. If you want to use attendance type values other than your institution's attendance type value, you can change the attendance Type field value for an individual student. When you exit the field, the system makes the change and updates the fields that appear on the roster according to the selected options for this particular course component and attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.

To use attendance types, define the attendance types and their associated fields for the course component on the Course Component Attendance page.

Description Describes the attendance type value, such as Class Meeting, Conference, Field Trip, Instructor Consultation, or Study Group.

Present Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component when you select the Use Present check box for this class meeting's attendance type on the Components page.

Tardy Select to indicate that the student was late to the class meeting. This field appears on the attendance rosters of this course component when you select the Use Tardy check box for this class meeting's attendance type on the Components page.

Left Early Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component when you select the Use Left Early check box for this class meeting's attendance type on the Components page.

Reason Describes a student's reason for being present, tardy, or leaving early. This field appears on the attendance rosters of this course component when you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.

The system displays the from time, to time, and contact minutes for the class meeting. When you generate attendance rosters for all class meetings within a scheduled class, either by using the Class Attendance page or the Attendance Roster Generator page, the system assigns each attendance roster these three values based on the class meeting pattern of the class in the schedule of classes. When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must manually assign these values.

From Time

Indicates the time that the student arrived at the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters and you can only change the from time to a value that falls within the template's time range.

To Time

Indicates the time that the student left the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the to time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the Template define the parameters of the From Time and To Time fields on the attendance rosters and you can only change the to time to a value that falls within the template's time range.

Contact Minutes

Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.

Template Number

The system displays the template number for the class meeting. The template number uniquely identifies each class meeting attendance roster.

CHAPTER 31

Tracking Student Data

Using PeopleSoft Student Records, you can track, use, and view non-course related student data.

This chapter lists common elements and discusses how to:

- Track academic standing.
- Track honors and awards.
- Track special grade point averages.
- Track milestones.
- Track extracurricular activities.
- Track student groups.
- Track Student attributes.
- Use service impacts.
- Assign academic advisors to students.
- View advisors through self-service pages.
- View advisee information through self-service pages.
- View student careers.
- View comments, checklists, and communications.
- View student photos.

Common Element Used in This Chapter

Tran Level (transcript level) Select the transcript level on which you want the given data to print. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Degr Prog* (degree progress), *Not Print, Official, Stdnt Life* (student life), and *Unofficial.*

See Also

Chapter 13, "Setting Up Transcripts," Understanding Transcript Levels, page 255

Tracking Academic Standing

This section discusses how to:

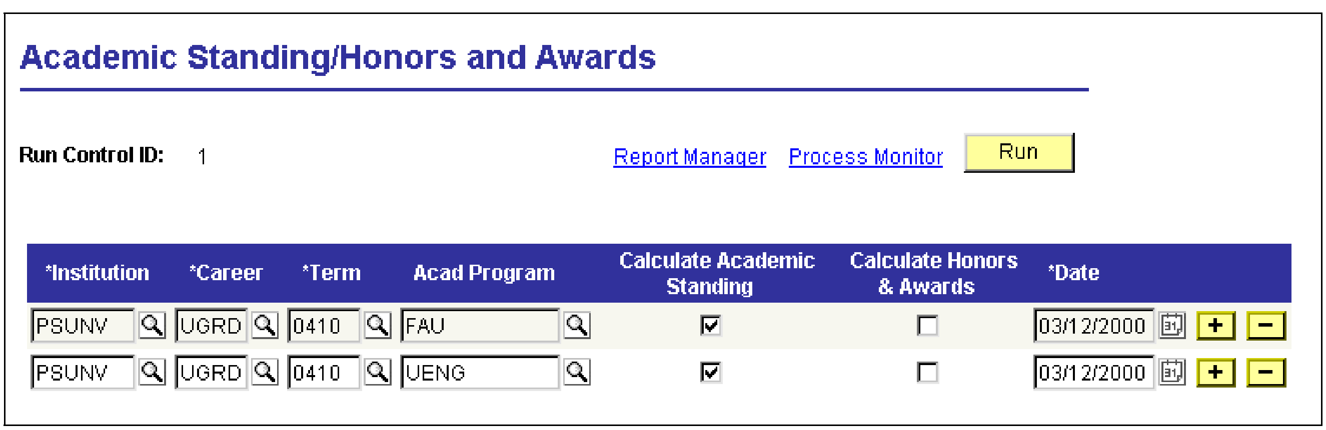
- Assign academic standing in batch.
- Track academic standing for individual students.

Pages Used to Track Academic Standing

Page Name	Object Name	Navigation	Usage
Academic Standing/Honors Awards	RUNCTL_SR_ASHA	Manage Student Records, Manage Academic Records, Process, Acad Standing/Honors-Awards	Enter parameters for and run the Academic Standing/Honors Awards process (SRPCEASD). The process evaluates students using the rules defined in the Academic Standing Rule page, assigning academic standing to students that pass the rule parameters.
Academic Standing	ACAD_STDNG_ACTN	Manage Student Records, Manage Academic Records, Use, Term History, Academic Standing	Track student academic standing. The Academic Standing process populates this page according to the rules you defined in the Academic Standing Rules page. You can also manually enter information on this page.

Assigning Academic Standing in Batch

Access the Academic Standing/Honors and Awards page.



Academic Standing/Honors and Awards page

The Acad Standing/Honors Awards (academic standing/honors awards) COBOL SQL process (SRPCEASD) evaluates students who are active in the academic institution, academic career, term, and academic program that you select. If students meet the parameters of the academic standing rule of honor award rule, the process updates these students' academic standing records or honors and awards records according to the rule. The process does not update students' academic standing for grades that do not count towards GPA, such as pass/no pass grades.

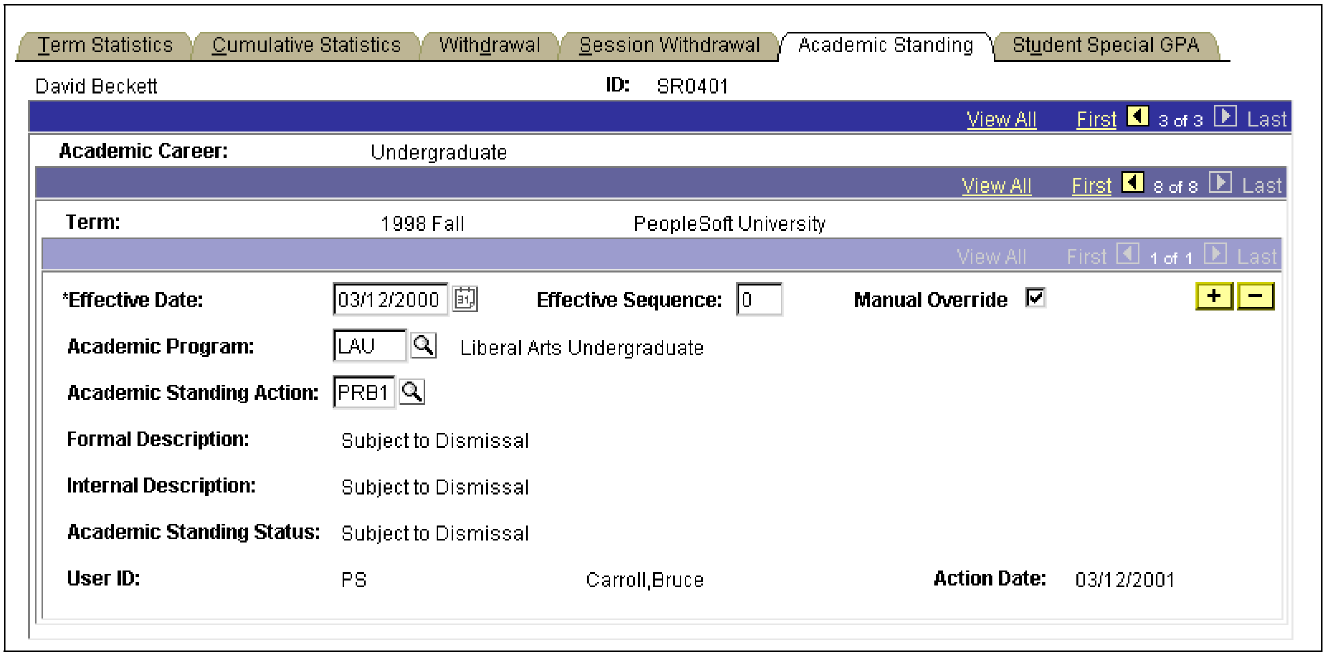
Institution	Select the academic institution that you want the system to use in the Academic Standing process.
Career	Select the academic career that you want the system to use in the Academic Standing process.
Term	Select the term that you want the system to use in the Academic Standing process.
Acad Prog (academic program)	Select the academic program that you want the system to use in the Academic Standing process.
Calculate Academic Standing	Select to calculate academic standing.
Calculate Honors & Awards	Select to calculate honors and awards. You can select both check boxes at once.
Date	Enter the date that you want the system to use in the Academic Standing process. The Academic Standing process displays the date that you enter here in the Date Received field on the Academic Standing page.

See Also

Chapter 31, "Tracking Student Data," Tracking Honors and Awards, page 699

Tracking Academic Standing for Individual Students

Access the Academic Standing page.



Academic Standing page

Effective Sequence

When manually entering academic standing, the default for the first academic standing action within a student's academic career and term is *0.*

If there are multiple academic standing actions within the same academic career and term, you must override the default value by manually incrementing the effective sequence for each additional academic standing action entered for the same effective date.

When the Academic Standing process populates this field, it enters effective sequences starting at ten and increments them by ten (such as 10, 20, and 30) when the effective date is the same as an existing row.

Manual Override

Select to indicate that you entered the information on this page manually.

Note. When you run the Academic Standing process, the system does not calculate academic standing for any records in which this check box is selected.

Academic Standing Action

Select an academic standing action.

Academic Program

Select the academic program of the student. The system prompts you for student's record.

Formal Description, Internal Description, and **Academic Standing Status**

The system displays these values according to corresponding values on the Academic Standing Table page.

Tracking Honors and Awards

This section discusses how to:

- Assign honors and awards in batch.
- Track honors and awards for individual students.

Pages Used to Track Honors and Awards

Page Name	Object Name	Navigation	Usage
Academic Standing/Honors Awards	RUNCTL_SR_ASHA	Manage Student Records, Manage Academic Records, Process, Acad Standing/Honors-Awards	Enter parameters for and run the Academic Standing/Honors Awards process (SRPCEASD). The process evaluates students using the rules defined in the Honors and Awards Rule page, assigning honors and awards to students that pass the rule parameters
Honors and Awards	HONORS_AWARDS_CS	• Build Community, Participation Data, Use, Honors and Awards • Build Community, Maintain People Data, Use A-K, Honors and Awards • Manage Student Records, Manage Academic Records, Use, Honors and Awards • Develop Enrollment, Process Applications, Use, Honors and Awards • Develop Enrollment, Recruit Prospective Students, Use, Honors and Awards • Manage Student Records, Track Student Careers, Use, Honors and Awards	Track student honors and awards. The Honors/Awards process populates the page according to the rules you set on the Honors/Awards Rule page. You can also manually enter information on this page.

Assigning Honors and Awards in Batch

Access the Academic Standing/Honors Awards page.

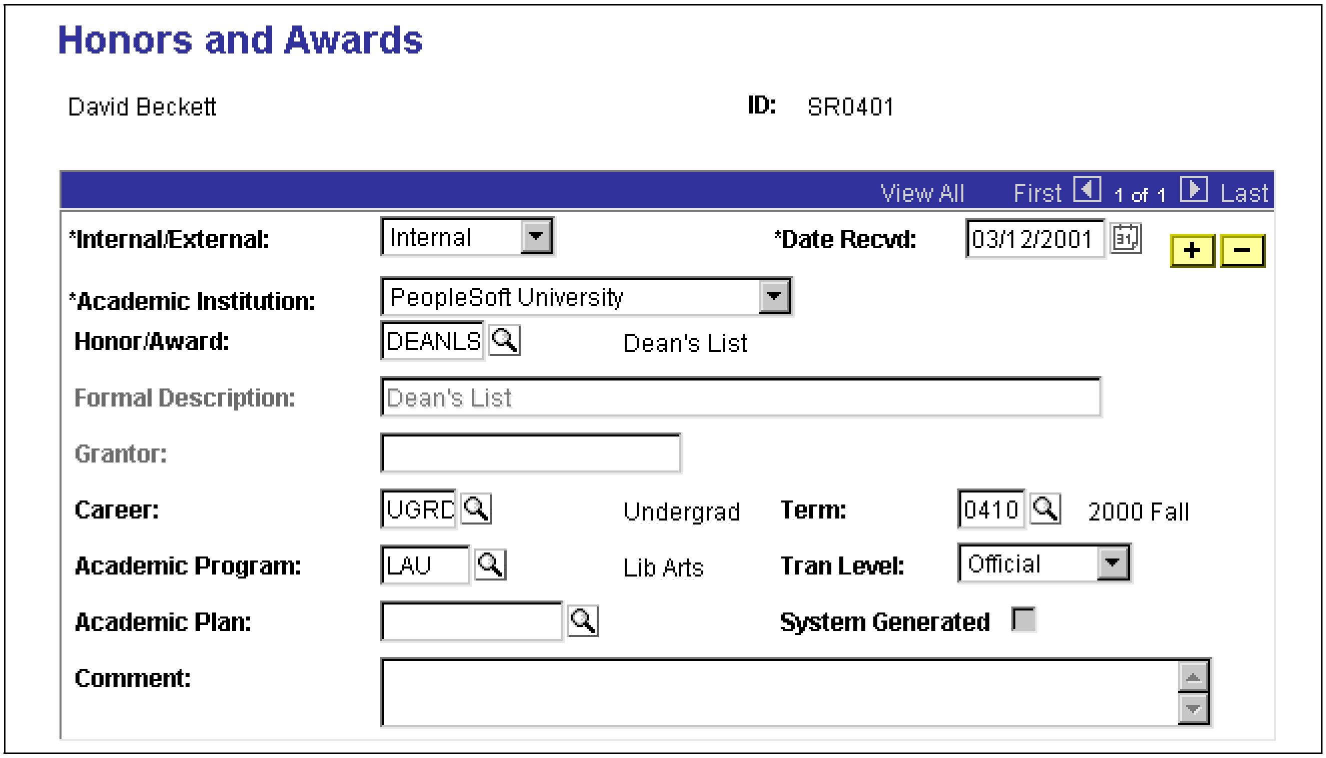
Use this to run the Academic Standing/Honors Awards process (SRPCEASD), which assigns honors and awards to students based on your run parameters and honor award rules.

See Also

Chapter 31, "Tracking Student Data," Tracking Academic Standing, page 696

Tracking Honors and Awards for Individual Students

Access the Honors and Awards page.



Honors and Awards page

Internal/External Indicate whether the student's honor or award relates to an external organization or your internal institution. Your choice here affects the honors and awards that you can choose in the Honor/Award field. The system prompts you with the corresponding honors and awards that you defined in the Honor/Award Table page.

Dt Recvd (date received) Enter the date that the student received the honor or award.

Academic Institution Select the academic institution for which you are entering the honor or award. Your choice here affects the honors and awards that you can choose in the Honor/Award field. The system prompts you with the corresponding honors and awards that you defined in the Honor/Award Table page for the academic institution that you select. Define academic institution values on the Academic Institution Table component.

Honor/Award Select the honor and award code that you want to assign to a student's record.

Formal Description and **Grantor** The system uses the honor and award code that you enter to populate the formal description and grantor of the honor or award. This information comes from the Honor/Award Table page.

Career	Enter the academic career for which the student is receiving the honor or award. The system prompts you with only the academic careers in which the student has been active.
Term	Enter the term for which the student is receiving the honor or award. The system prompts you with the terms in which the student has been active according to the academic career you select.
Academic Program	Enter the academic program for which the student is receiving the honor or award. The system prompts you with the student's academic programs according to the academic career.
Academic Plan	Enter the academic plan for which the student is receiving the honor or award. The system prompts you with the student's academic plans according to the academic career or program.
System Generated	The system selects this check box if the Honors/Awards process generated this honor and award.

Tracking Special Grade Point Averages

This section provides an overview of how to assign special grade point averages and discusses how to maintain a student's special grade point averages.

See Also

Chapter 9, "Preparing to Track Student Data," Setting Up Special Grade Point Averages, page 218

Understanding How to Assign Special Grade Point Averages

There are three different ways to assign special grade point averages to students.

- If you have calculated students' grade point averages through the PeopleSoft Academic Advisement report process using the analysis database report option, your institution can design a process that populates the Student Special GPA page with the results of the calculation, storing them for future analysis.
- You can create and define your own calculation process through the process scheduler.
- You can directly input the special grade point average onto the Student Special GPA page, then use these averages for other applications within PeopleSoft Student Administration.

See Also

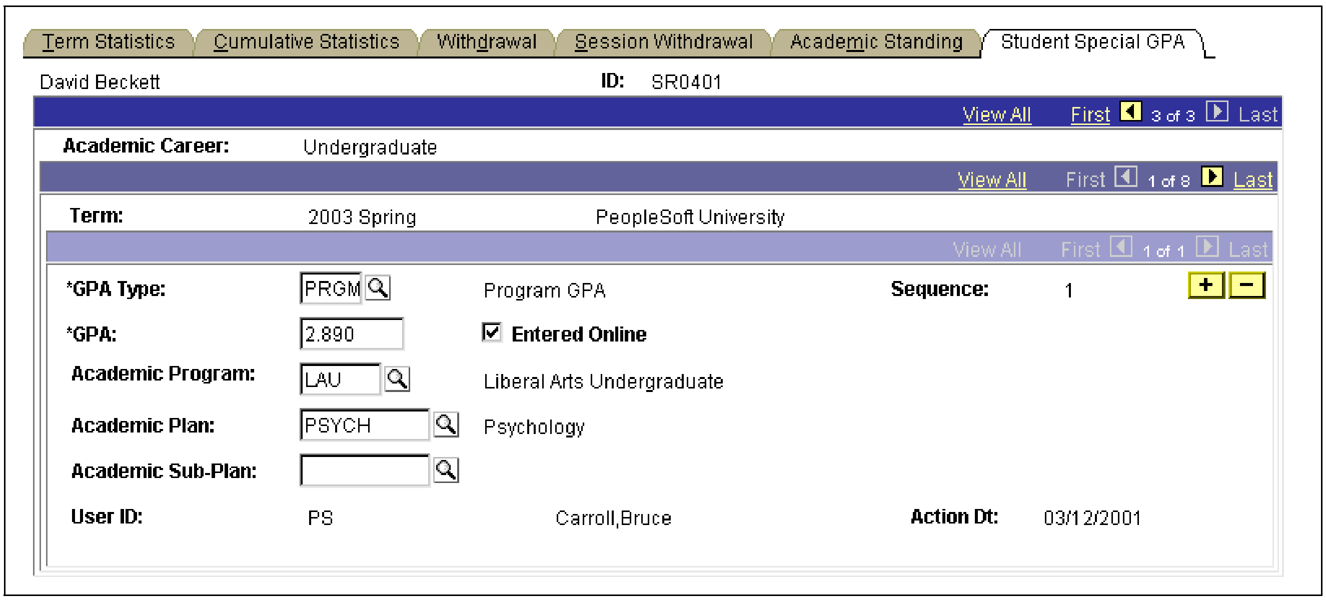
PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Using the Analysis Database to Create User Configurable Reports"

Page Used to Track Special Grade Point Averages

Page Name	Object Name	Navigation	Usage
Student Special GPA (student special grade point average)	STDNT_SPCL_GPA	Manage Student Records, Manage Academic Records, Use, Term History, Student Special GPA	Assign types of grade point averages to a specific student's term record, indicating whether the student's special grade point average belongs to his or her academic program, academic plan, or academic subplan.

Maintaining Special Grade Point Averages

Access the Student Special GPA page.



Student Special GPA page

GPA Type

Select the grade point average type for the grade point average that you want to enter.

Sequence

The sequence number default is *1*. The system increases the number sequentially by one as you add new rows. The system evaluates special grade point average numbers in sequence.

GPA

The default grade point average is 0.000. Enter the student's special grade point average. There is no programming tied to this field in the delivered application. Any reporting you choose to perform based on the value entered here must be programmed by your institution.

Entered Online

Select to distinguish this special grade point average from those populated by a configured background process. This flag has no programming tied to it, but you can use it for reporting purposes.

Academic Program	Select the student's academic program for which you are creating the special grade point average. The list box displays the student's active academic programs. (Optional)
Academic Plan	Select the student's academic plan for which you are creating the special grade point average. The list box displays the student's active academic plans. (Optional)
Academic Sub-Plan	Select the student's academic sub-plan for which you are creating the special grade point average. The list box displays the student's active academic sub-plans. (Optional)

Tracking Milestones

Milestones are non-course-related events that a student must fulfill for a degree. They include things like language requirements, qualifying and oral examinations, thesis, and dissertation. Use the Student Milestones component to assign milestones and advisors, as well as to record completions of milestones and attempts to fulfill them.

This section discusses how to:

- Assign milestones to students.
- Create milestones from templates.
- Assign committees and advisors to students completing milestones.
- Record milestone attempts.

See Also

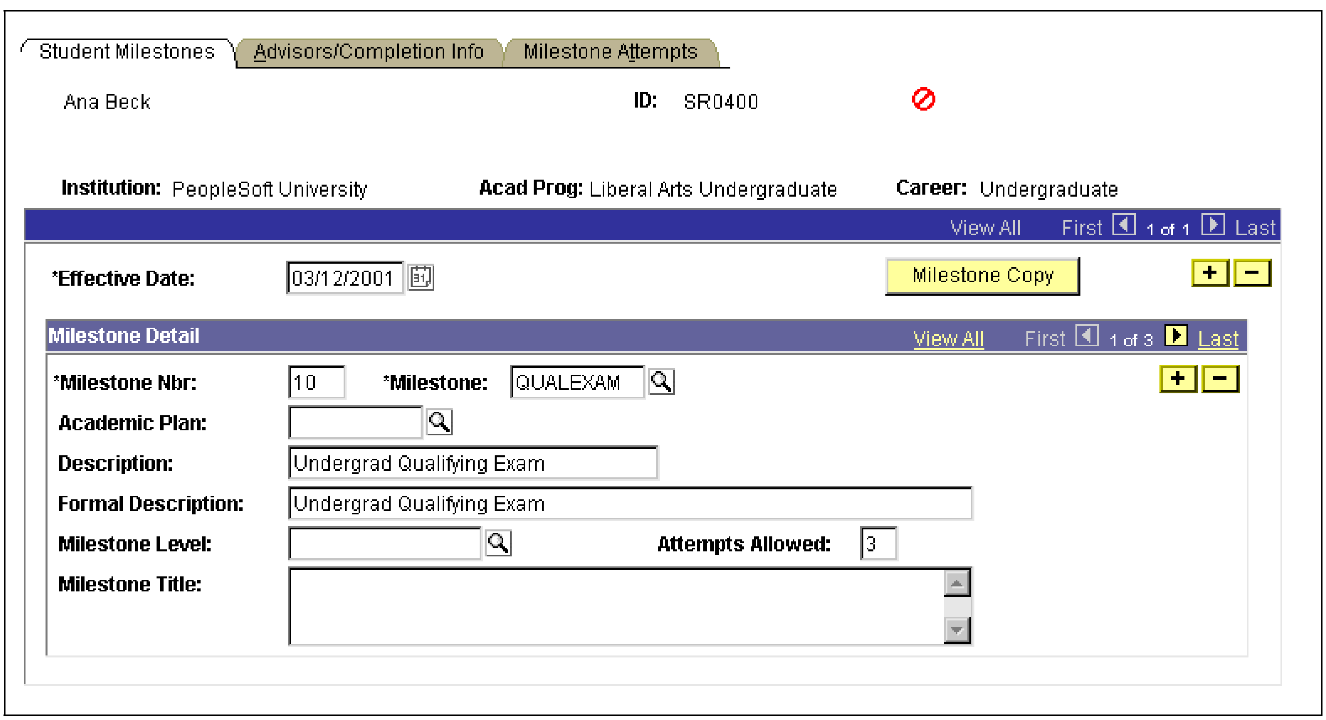
Chapter 9, "Preparing to Track Student Data," Setting Up Milestones, page 219

Pages Used to Track Milestones

Page Name	Object Name	Navigation	Usage
Student Milestones	STUDENT_MILESTONE1	Manage Student Records, Manage Academic Records, Use, Student Milestones, Student Milestones	Assign milestones to a student.
Create Student Milestones	STDNT_MLSTN_COPY	Click the Milestone Copy button on the Student Milestone page.	Create milestones from templates by copying milestone information from the milestone template into the student's transcript.
Advisors/Completion Info (advisors/completion information)	STUDENT_MILESTONE3	Manage Student Records, Manage Academic Records, Use, Student Milestones, Advisors/Completion Info	Assign either advisors or a committee to students completing the milestone, and record the milestone completion date. Each milestone can have a different advisor.
Milestone Attempts	STUDENT_MILESTONE4	Manage Student Records, Manage Academic Records, Use, Student Milestones, Milestone Attempts	Record grading information and milestone attempted information.

Assigning Milestones to Students

Access the Student Milestones page.



Student Milestones page

Milestone Nbr (milestone number) The milestone number default is 10. As you insert rows, the system increments this number sequentially. The milestone number is used for sequencing.

Milestone Select the milestone.

Academic Plan Select the academic plan to which the milestone is attached. The system prompts you from the student's academic record.

Milestone Level Select the milestone level. Some milestones, such as Comprehensive Exams, can have multiple levels. You can override this value.

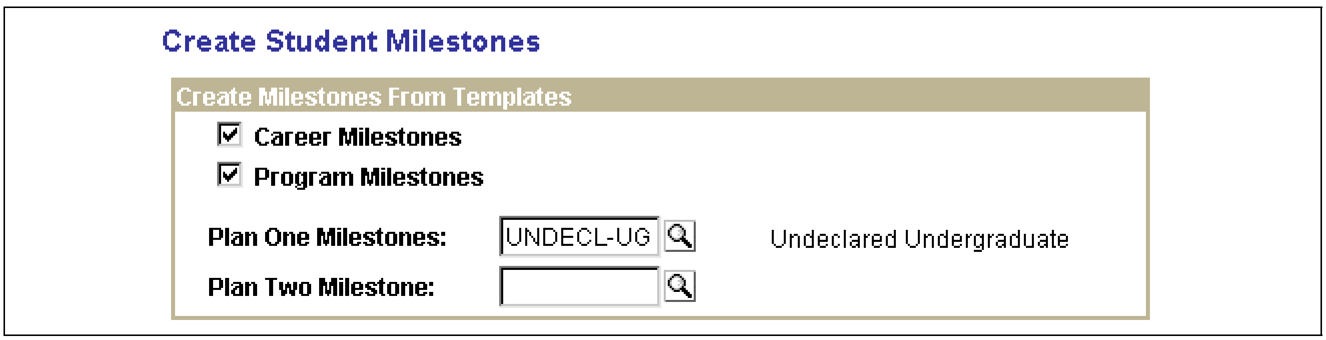
Attempts Allowed The system populates the attempts allowed from the Milestone Table page. You can override this value.

Milestone Title Enter a title for the milestone. You can print the title on the student's transcript.

Milestone Copy Click to copy milestone information from the milestone template into the student's record.

Creating Milestones From Templates

Access the Create Student Milestones page.



Create Student Milestones page

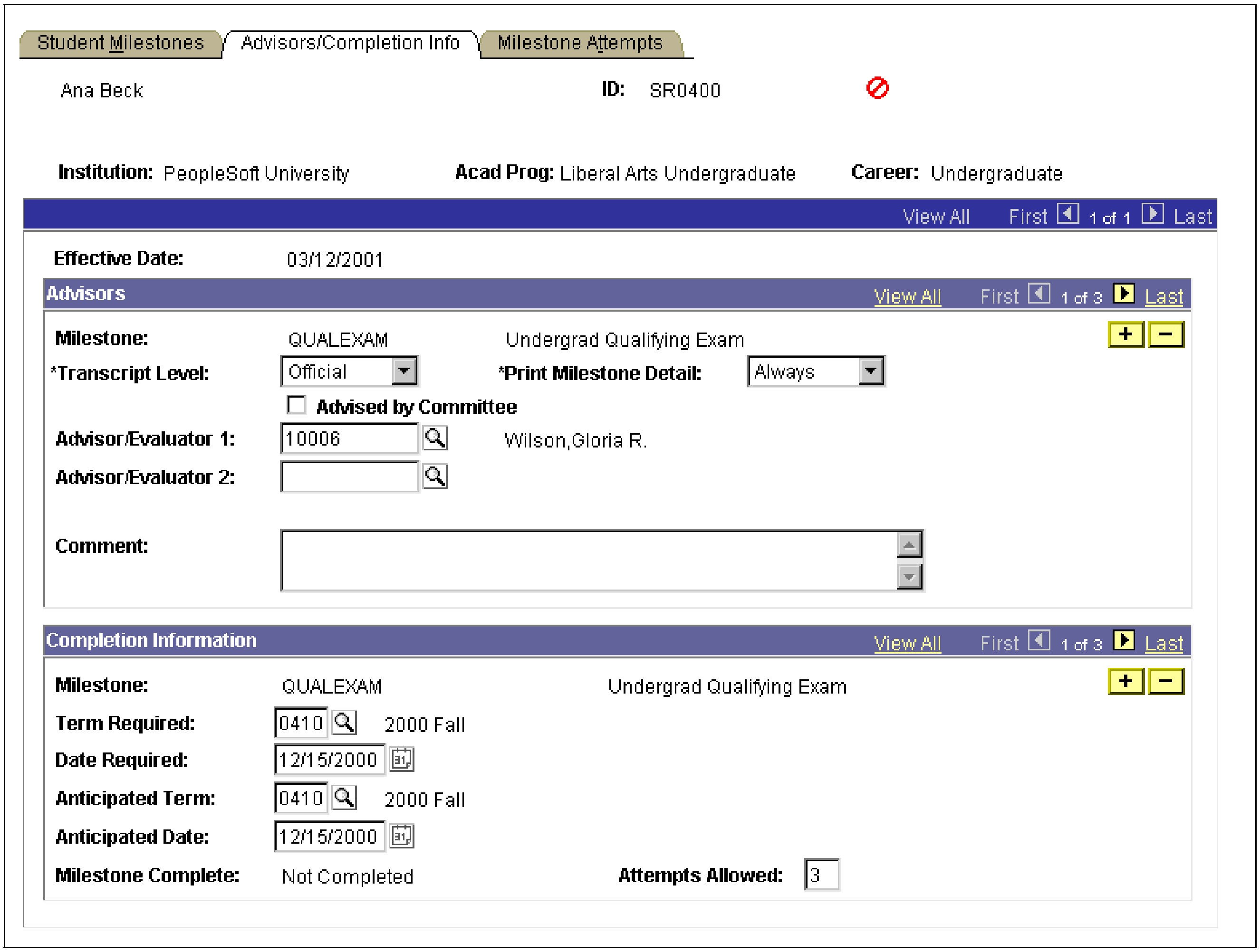
Career Milestones Select to choose a milestone that is within the student's academic career. The system transfers the information from the template into the Student Milestone page.

Program Milestones Select to choose a milestone that is within the student's academic program. The system transfers the information from the template into the Student Milestone page.

Plan One Milestones and **Plan Two Milestones** Select plan one and/or plan two milestones to choose a milestone that is within the student's academic plan. The system transfers the information from the template into the Student Milestone page.

Assigning Committees and Advisors to Students Completing Milestones

Access the Advisors/Completion Info page.



Advisors/Completion Info (advisors/completion information) page

Print Milestone Detail
Indicates when the milestone will print on the transcript. The system transfers this value from the Milestone Template page. You can override this value. Values for this field are delivered with your system as translate values. The delivered values are *Always, Never,* and *Satisfied.*

Advised by Committee
Select to assign an advisory committee to the student. When you select this check box the Committee field appears.

Committee
Select a committee. This field appears when you select the Advised by Committee check box.

Advisor/Evaluator 1 and **Advisor/Evaluator 2**
If you do not select the Advised by Committee check box, select individual advisors for the student. The system prompts you with advisors that are within the student's academic career and academic program.

Term Required
Select the term by which the milestone must be completed.

Date Required
The system populates this date based on the term required value on the Term Table page. You can override this date.

Anticipated Term
Select the term by which you anticipate the student will complete the milestone.

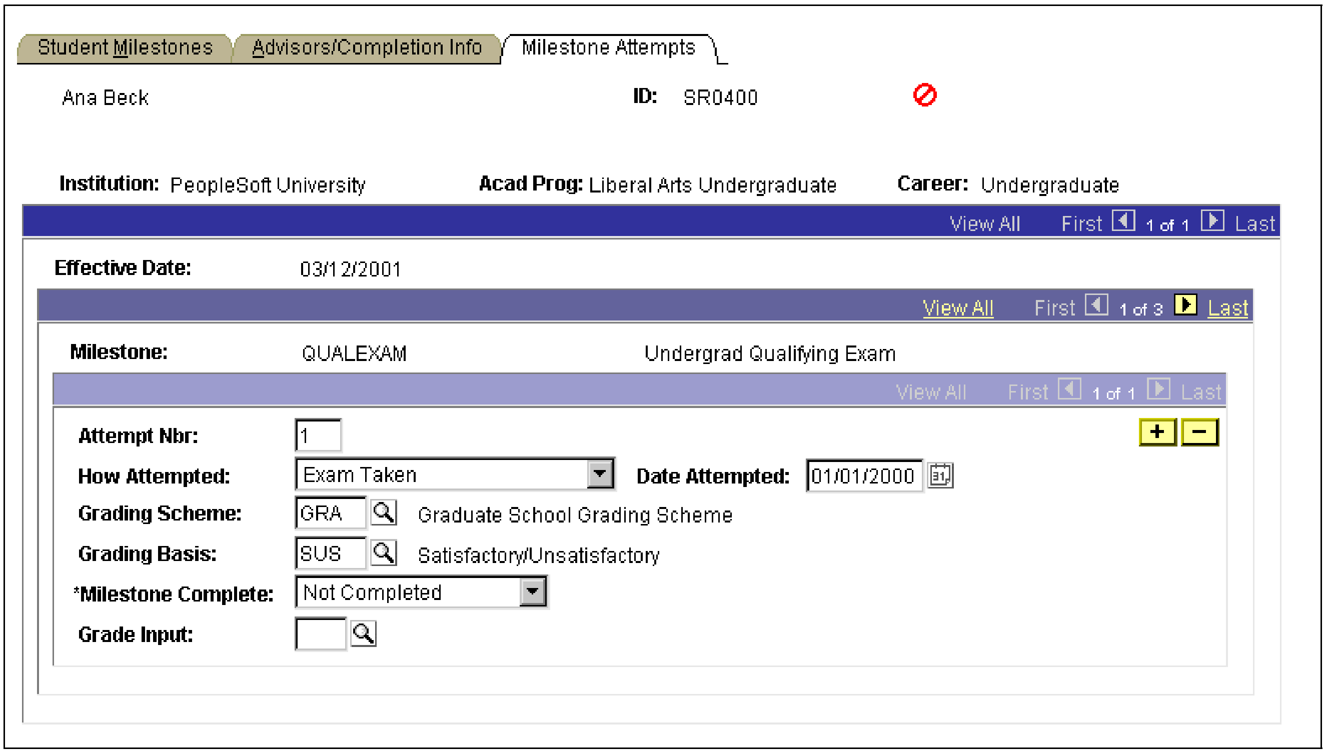
Anticipated Date The system populates this date based on the anticipated term value and the Term Table page. You can override this date.

Milestone Complete The system displays the milestone complete status according to the values entered on the Milestone Attempts page.

Attempts Allowed The system displays the attempts allowed according to the values entered on the Milestone Template page. You can override this value.

Recording Milestone Attempts

Access the Milestone Attempts page.



Milestone Attempts page

Attempt Nbr (attempt number) Enter the number of the student's attempt at this milestone.

How Attempted Select how the milestone was attempted. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Attended Seminar, Exam Taken, Filed Petition, Native Speaker,* and *Submitted Work.*

Date Attempted Enter the date that the student attempted the milestone.

Grading Scheme and **Grading Basis** The system populates the grading scheme and grading basis from the Milestone Template page. You can override these values.

Milestone Complete Select the status of the milestone. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Completed, In Progress,* and *Not Completed.*

Grade Input Enter a grade (if required by the grading scheme and grading basis).

Tracking Extracurricular Activities

This section discusses how to record and track an individual's extracurricular activities.

See Also

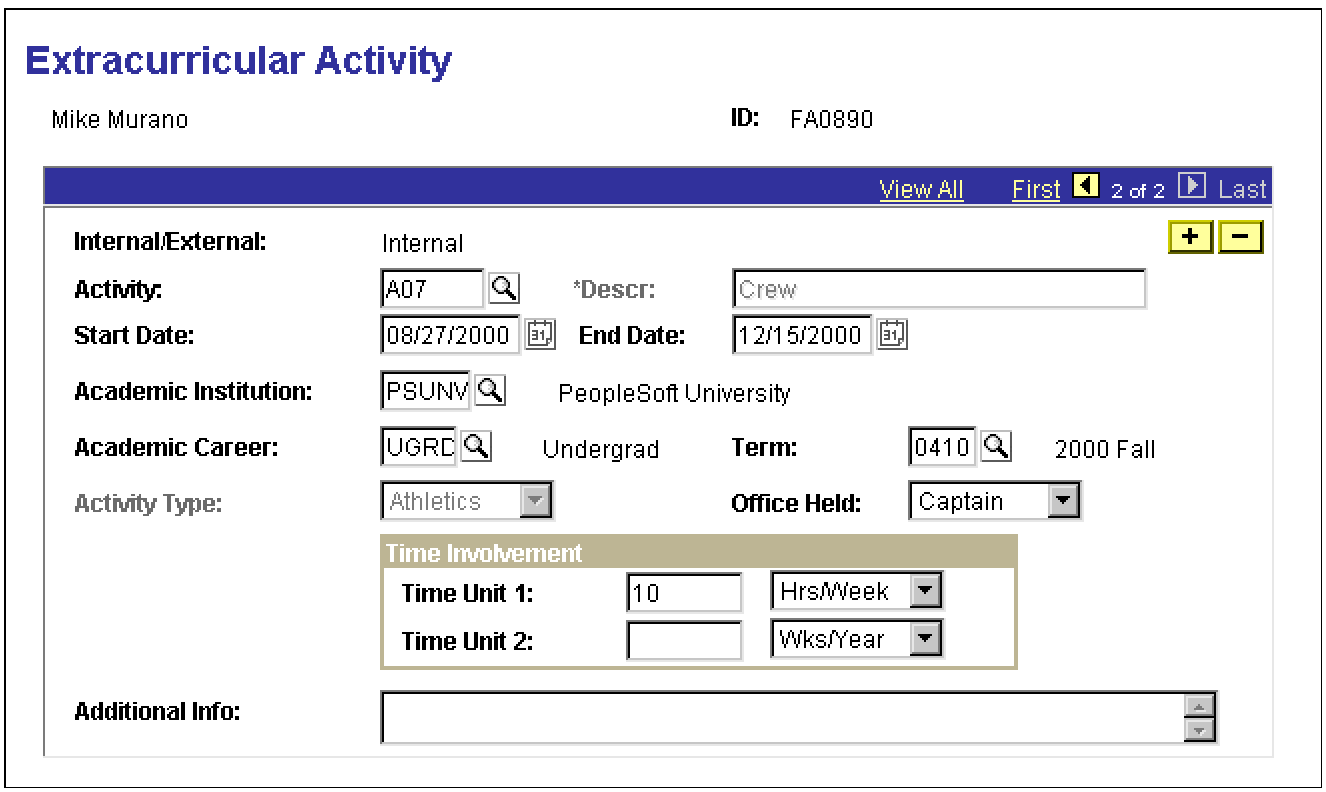
Chapter 9, "Preparing to Track Student Data," Setting Up Extracurricular Activities, page 222

Page Used to Track Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity	STDNT_EXTRA_ACTVTY	Manage Student Records, Track Student Careers, Use, Extracurricular Activity	Record and track an individual's extracurricular activities. This page is shared with PeopleSoft Recruiting and Admissions and PeopleSoft Campus Community.

Tracking an Individual's Extracurricular Activities

Access the Extracurricular Activity page.



Extracurricular Activity page

Activity	Select an extracurricular activity.
Start Date	The default for the start date is your system date.
End Date	Enter the date that the activity ended.
Academic Institution and **Academic Career**	The system populates the academic institution and academic career of the student, unless the student has more than one academic career or institution on their record. In that case, you can select the appropriate academic institution and academic career.
Term	Select the academic term in which the activity took place.
Activity Type	The system populates the activity type if it was defined on the Extracurricular Activity Table page. You can change this value.
Office Held	Select the office that the person held (if applicable). Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Captain, EIC, President, Treasurer,* and *Vice Pres* (vice president).
Time Unit 1 and **Time Unit 2**	Enter the amount of time the student spent participating in this activity. Time units can represent hours per week, hours per month, and so on. Select the time unit qualifier in the field next to this one. Values for this field are delivered with your system as translate values. You can modify these values.
Additional Info (additional information)	Enter any comments or notes regarding the student's participation in this extracurricular activity.

Tracking Student Groups

This section discusses how to track student groups.

See Also

Chapter 9, "Preparing to Track Student Data," Managing Student Groups, page 224

Page Used to Track Student Groups

Page Name	Object Name	Navigation	Usage
Student Groups	STDNT_GROUPS	• Develop Enrollment, Process Applications, Use, Student Groups • Develop Enrollment, Recruit Prospective Students, Use, Student Groups • Manage Student Records, Track Student Careers, Use, Student Groups	Track student membership in various groups for reporting, fee calculation, or degree progress assessment. You track groups within an academic institution, so students of any program or career can be associated with the same group.

Tracking Student Attributes

This section discusses how to track student attributes.

See Also

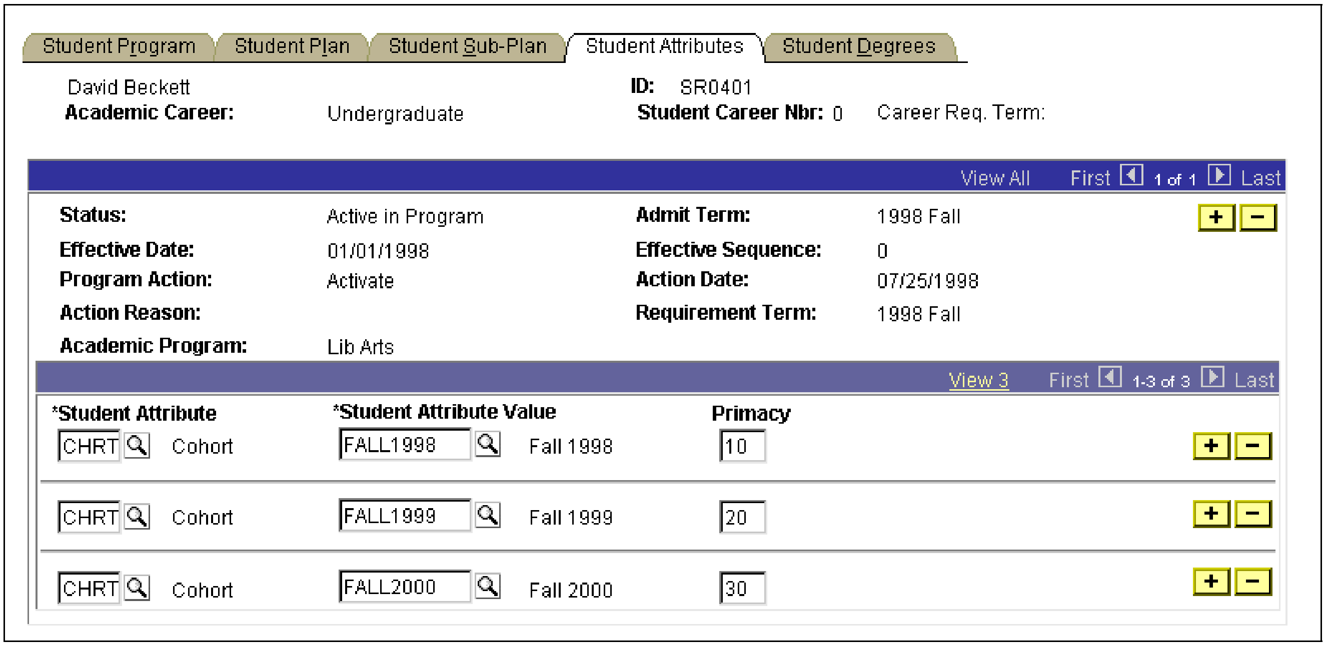
Chapter 9, "Preparing to Track Student Data," Setting Up Student Attributes, page 224

Page Used to Track Student Attributes

Page Name	Object Name	Navigation	Usage
Student Attributes	STDNT_ATTRIBUTES	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Attributes	Track student attributes and values for students.

Tracking a Student's Attributes

Access the Student Attributes page.



Student Attributes page

Student Attribute Select the student attribute that you want to attach to the student for cohort tracking and reporting purposes.

The Consolidate Academic Statistics process compares this student attribute to the value existing in the Student Attribute for Cohort field on the Academic Institution 3 page. If the process finds a match, it writes this student attribute to the student's academic statistics record.

Student Attribute Value Select the student attribute value associated with the student attribute.

Primacy Enter the primacy number for this student attribute. If you enter the same student attribute more than once, the Consolidate Academic Statistics process writes the one with the lowest primacy number to the student's consolidated statistics record. This primacy number has no relation to financial aid primacy.

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," page 821

Using PeopleSoft Student Records Service Impacts

Use service indicators to provide or limit access to services in your system. Service indicators can be holds to prevent an individual from receiving certain services or positive indicators to designate special services to be provided. Service indicators consist of one or more service impact values identifying the types of specific services that are restricted or provided.

PeopleSoft Student Records enables you to attach specific service impacts to negative service indicators, which, when assigned to a student, restricts the student from receiving certain services. These specific service impacts are the following:

CENR Restricts *all* enrollment activity (such as adds, drops, swaps, or wait lists) for a student with existing enrollment for the current term.

IENR Prevents a student from initially enrolling into a class but permits the student to add or drop classes if they already have enrollment activity for the current term.

AENR Prevents a student from initially enrolling into a class *and* prevents the student from adding a class, *but* permits the student to drop classes if they have already have enrollment activity for the current term.

ENVER Prevents the enrollment verification process from printing a student's enrollment verification request.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Service Indicators"

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Setting Up Service Indicators"

Assigning Academic Advisors to Students

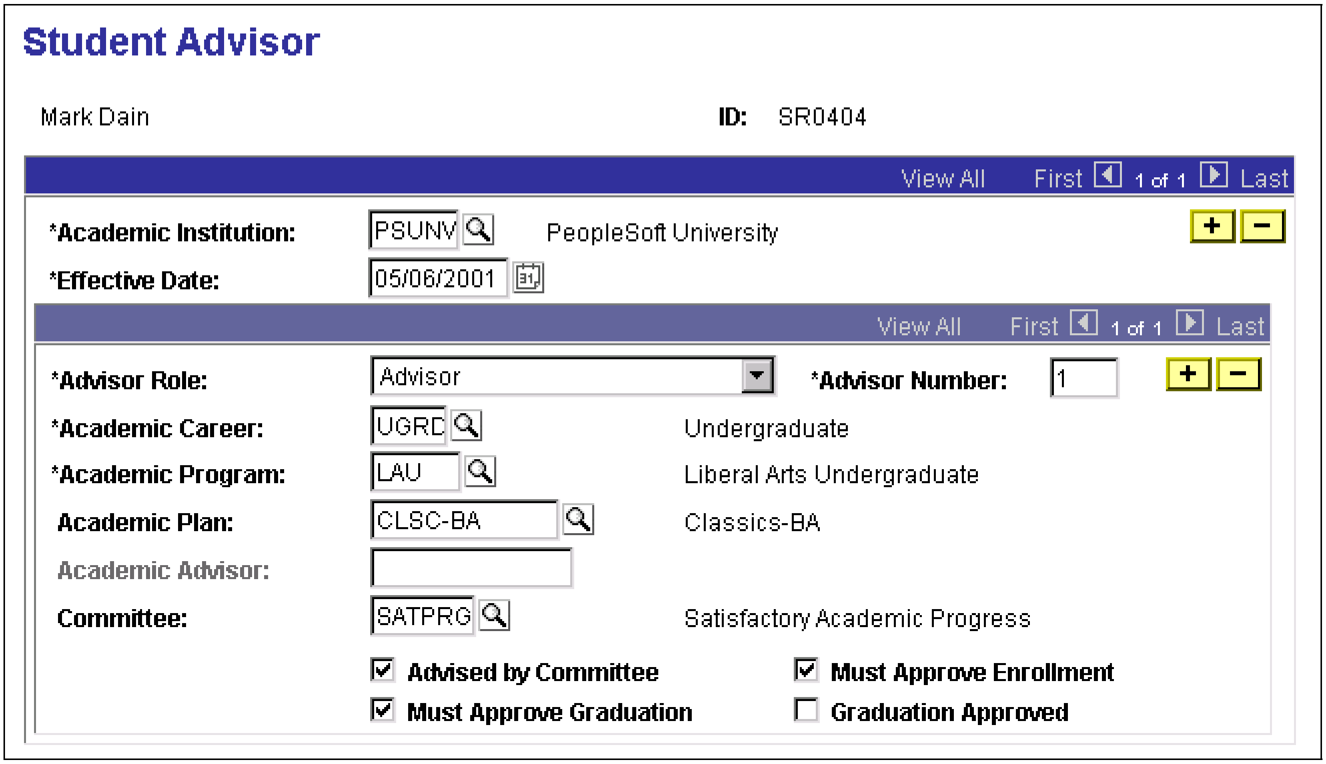
This section discusses how to assign academic advisors to students.

Page Used to Assign Academic Advisors to Students

Page Name	Object Name	Navigation	Usage
Student Advisor	STDNT_ADVISOR	Manage Student Records, Track Student Careers, Use, Student Advisor	Assign individual advisors or a committee of advisors to a student. The student must be active in an academic career and an academic program.

Assigning Advisors to Students

Access the Student Advisor page.



Student Advisor page

Academic Institution

Select the academic institution for which you want to assign the student an academic advisor.

Effective Date

Enter the date that the student's advisor or advisory committee becomes effective for the student.

Advisor Role

Select the role that the advisor serves for the student. Values for this field are delivered with your system as translate values. You can modify these values.

Advisor Number

The system, by default, sets the number of the advisor to *1,* and it increases the number by one as you add new advisors or committees.

Academic Career

Select the student's academic career for which you want to assign the advisor. The system prompts you with options based on the student's career term record.

Academic Program

Select the student's program for which you want to assign the advisor. The system prompts you with options based on the student's program record.

Academic Plan

Select the student's plan for which you want to assign the advisor. The system prompts you with options based on the student's program record.

Academic Advisor

If an individual advises a student, select that individual advisor. The system prompts you with advisors that are within the student's academic career and academic program. If this field is unavailable for entry, you must first clear the Advised by Committee check box.

Committee

If a committee rather than an individual advises a student, select the committee. If this field is unavailable for entry, you must first select the Advised by Committee check box.

Advised by Committee	If a committee rather than an individual advises a student, select this check box. The Committee field becomes available for entry, and the Academic Advisor field becomes unavailable for entry.
Must Approve Enrollment	Select to indicate that the advisor must approve a student's enrollment into classes. This check box is for information purposes only. There is no coding behind it.
Must Approve Graduation	Select to indicate that the advisor or committee must make a degree check before your institution can complete the student's graduation process. The Graduation Approved check box becomes available for entry. Both check boxes are for information purposes only. There is no coding behind them.
Graduation Approved	Select to indicate that the advisor or committee has made a degree check and your institution can now complete the student's graduation process. This check box is available for entry only when you select the Must Approve Graduation check box.

Viewing Advisors Through Self-Service Pages

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services Application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section describes how students can view their advisors through self-service pages.

Page Used to View Advisors Through Self-Service

Page Name	Object Name	Navigation	Usage
My Advisors	SS_STDNT_ADVISR	SA Self Service, Learner Services, Academics, View My Advisors	Students can view their academic advisors by academic career and program at an academic institution.

Viewing Advisee Information Through Self-Service Pages

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learning Management application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

This section discusses how advisors can view an advisee's roster, view an advisee's academic program information, and view a new/drop-in advisee's roster.

Pages Used to View Advisee Information Through Self-Service

Page Name	Object Name	Navigation	Usage
Student Advisee Roster	SS_ES_GRADE_LISTA	SA Self Service, Learning Management, Advisement, View Advisees' Information, Student Advisee Roster	Advisors can view all of their advisees' class schedules, enrollment appointments, term grades, degree progress reports, transfer credit reports, and unofficial transcripts.
Academic Information	SS_ADV_STUDACAD	SA Self Service, Learning Management, Advisement, View Advisees' Information, Student Advisee Roster	Advisors can use the page to view an advisee's academic program information, which includes the advisee's academic program, academic career, desired degree, and major.
New/Drop-In Advisees	SS_ADV_ANYONE	SA Self Service, Learning Management, Advisement, New/Drop-In Advisees	Advisors can view class schedules, enrollment appointments, grades, degree progress, and unofficial transcripts for new and drop-in advisees.

Viewing Student Careers

This section discusses how to view student careers.

Page Used to View Student Careers

Page Name	Object Name	Navigation	Usage
Student Career	STDNT_CAREER	Manage Student Records, Track Student Careers, Inquire, Student Career	View a summary of academic career information for an individual student.

Viewing Comments, Checklists, and Communications

You can create comments, checklists, and communications for students. This section discusses comments, checklists, and communications only briefly here. However, this functionality is discussed more fully in the *PeopleSoft Campus Community PeopleBook.*

- Use the Comment Summary page to view comments created for a student.

- Use the Communication Summary page to view a communication summary for a student.
- Use the Checklist Summary page to view checklist summary information for a student.
- Use the Operator 3C Groups Summary page to view and modify user inquiry groups.

Viewing Student Photos

This section discusses how to view student photos.

Page Used to View Student Photos

Page Name	Object Name	Navigation	Usage
Photograph	EMPLOYEE_PHOTO	• Administer Workforce, Administer Workforce (GBL), Use, Identification Data, Employee Photo • Develop Workforce, Plan Careers, Use, Employee Photo • Develop Workforce, Plan Successions (GBL), Use, Candidate Photo, Employee Photo	View student photos.

CHAPTER 32

Managing Interoperability for Learning Management Systems

This chapter provides an overview of the Learning Management Systems (LMS) feature and extract files, and discusses how to run the LMS extract process.

See Also

Chapter 10, "Setting Up Interoperability for Learning Management Systems," page 227

Understanding the Learning Management Systems Feature

The goal of the Learning Management System (LMS) project is to develop a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments. Based on Instructional Management Systems (IMS) enterprise system specifications, the current LMS interoperability extract feature supports one-way file transfer between PeopleSoft Student Administration and another learning management system.

The LMS feature enables institutions to provide a third-party LMS (such as Blackboard CourseInfo) with personal profile data for learners and instructors, enrollment data and maintenance, and limited course scheduling data maintenance. The LMS feature also provides basic integration with PeopleSoft Student Portal. Depending on your extract target, you can format LMS data with a unique file type of XML V1.01, Blackboard CourseInfo 4, or WebCT API Input Format. Currently, the feature does not support passing data or information back to PeopleSoft Student Administration from another LMS environment; nor does it include a real-time transactional messaging interface based on event processing.

The LMS extract feature supports IMS Enterprise Specification V. 1.01 XML data binding specifications. It also supports a simple, common, delimited option for WebCT API Input Format and Blackboard CourseInfo 4.0. File selection criteria are available at run time for you to specify which type of files to pass. In addition, you can use packaging options to indicate how you want the system to organize the extract files.

The LMS interoperability extract includes the following extract functions:

- Administrative (properties object) data that describes the contents of an extract file.
- Personal (person object) data about students and instructors.
- High-level class (group object) data.
- Enrollment (group membership object) data.

High-level definitions for these four types of object data are provided in the following sections.

Properties Object Data

The Properties Object data serves as a file header, and contains descriptive data regarding the contents of the file.

Person Object Data

SourceID for person object data is comprised of two things.

Person SourceID	The source is the academic institution with which the person is associated. The ID is a unique identifier for the individual. The ID field is used.
UserID	This is the ID that the administrator uses to access the LMS. This is the PeopleSoft ID.

Group Object Data

The source is the description of the academic institution in which the class is scheduled.

The ID is a unique identifier for the group. By default, this is TERM_INST_ SUBJECT_ CATALOG NBR_ SEC#.

Group Membership Object Data

Membership sourceID for group membership object data is comprised of two things.

The membership source is the description of the academic institution in which the class is scheduled.

The membership ID is a unique identifier for the group. By default, this is TERM_INST_SUBJECT_ CATALOG NBR_ SEC#

Member SourceID	Same as person sourceID. The source is the academic institution with which the person is associated. The ID is a unique identifier for the individual. The system uses the individual's ID.
Member	Member is comprised of three things: sourceID, ID type, and role. Each of these values includes additional detail as follows:
Source	The academic institution with which the person is associated.
ID	A unique identifier for the individual. The ID field is used.
ID Type	Values include '1' (person) or '2' (group). Currently, the ID Type is always '1'.
Role	Has an attribute of roletype, and can be '01' (student) or '02' (instructor).
SubRole	A description of the instructor's role, and does not apply for those with a roletype of student.
Status	Values include '1' (active, enrolled) or '0' (inactive, withdrawn, dropped) based on the enrollment status.
UserID	The same as the Person UserID.

Comments	The enrollment status reason.
Date	The student enroll status date.
TimeFrame Final Result	Includes a mode (grading basis) and result (grade) for students only.

Note. All remaining fields are straightforward and come from a variety of PeopleSoft Human Resources tables in PeopleSoft Student Administration.

Reviewing Extract File Creation Logic

Each LMS file type presents slightly different extract processing requirements. The following section highlights these requirements for each of the three file types: XML (Enterprise V1.01), Blackboard CourseInfo 4, and WebCT API Input Format. Before you use the LMS Extract component, familiarize yourself with the requirements of the file type you plan to use.

Note. Students who have dropped the reported class prior to the drop or retain date are not included in any update of the LMS extract. In other words, if you run a snapshot, then run an update prior to the drop or retain date, any students dropped since the snapshot are *not* updated or deleted from the LMS because their enrollments have been deleted from PeopleSoft Student Administration. Develop your production refresh schedule with this in mind.

XML

The XML file type creates people, group, and membership files.

- The extract modes available are *Update* and *Snapshot.*
- You can create extract files individually, in combination with other files, or combined into a single file.
- File output for the objects includes the following:

  People

  Snapshot: All students and instructors who are members of the classes that meet the runtime criteria.

  Update: All students and instructors who are members of the classes that meet the runtime criteria.

  Groups

  Snapshot: All classes that meet the runtime criteria.

  Update: Only classes with no extract datetime that meet the runtime criteria.

  Memberships

  Snapshot: All students and instructors of the classes meeting the runtime criteria.

  Update: All instructors of the classes that meet the runtime criteria. Specifically, the extract includes students that meet the runtime criteria who have a STATUS_DT, ENRL_ADD_DT, GRADING_BASIS_DT, ENRL_DROP_DT, or GRADE_DT that is greater than or equal to the class enrollment extract datetime (for example, newly enrolled students or already enrolled students with a meaningful change).

Blackboard CourseInfo

The Blackboard CourseInfo 4 file type enables the creation of user (people), course (group) and populate Course (membership) files. The Blackboard CourseInfo 4 files are delimited files uploaded through a batch utility in their system. Students must have email addresses (home or campus) in order for the system to extract them and include them in the people object.

- The extract modes available are *Update* and *Snapshot.*
- These files can be created individually, or in combination with others.
- File output for the objects is:

  User

  Snapshot: All active students in classes that meet the runtime criteria.

  Update: All active students in classes that meet the runtime criteria.

  Course

  Snapshot: All classes meeting the runtime criteria.

  Update: Only classes with no extract datetime that meet the runtime criteria.

  Populate Course

  Snapshot: All instructors and active students of the classes meeting the runtime criteria.

  Update: All instructors of the classes meeting the runtime criteria. Only active students in classes meeting the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime (that is, new students).

WebCT

The WebCT API Input Format file type enables the creation of class (group), student (people/membership), and global files. The WebCT files are delimited files loaded into their system through the use of an API.

- The extract modes available are *Update* and *Snapshot.*
- These files can be created individually, or in combination with others.
- File output for the objects is:

  Class (PeopleSoft provides this file as informational because WebCT does not use an API to load classes.)

  Snapshot: All classes that meet the runtime criteria.

  Update: Only classes with no extract datetime data that meet the runtime criteria.

  Student (One file is created per class because the files are loaded through an API where the Course ID is specified on the command line.)

  Snapshot: All active students in classes that meet the runtime criteria.

  Update: Only active students in classes meeting the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime (for example, new students).

  Global

You cannot select global files to run individually. They are run automatically every time that the student file is selected. This is necessary because the Global API has two formats: *FileAdd* and *FileUpdate.* If the system does not run the global file in lock-step with the student file, it cannot identify the first time that a student is passed through the extract process to the global database.

Snapshot: FileAdd format only - All active students in classes that meet the runtime parameters are included.

Update:

FileAdd format - Only active students in classes that meet the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime for all their classes.

FileUpdate format - Students who have already passed through the extract process at least once before, but have at least one new class in this run.

Active students are not included if their status date is less than the class enrollment extract datetime for all of their classes (for example, there is no new course list information to pass).

Active students who are in more than one class, and who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime for a class (for example, there is at least one new course to add to a student's list).

Performing the LMS Extract Process

Use the LMS Extract process to create extract files of object properties data in the appropriate format for your target learning management system. You can specify all of your run time parameters on the LMS Extract - Setup and LMS Extract - Criteria pages, and designate the appropriate file path for your extract files on the LMS Extract - Output page. Once the process completes, you can locate your extract files in the file directory that you specify. You can run the extract process in either snapshot or update mode.

Here's how to extract LMS data:

1. Define extract parameters on the LMS Extract - Setup, LMS Extract - Criteria, and LMS Extract - Output pages.
2. Run the extract process.

Prerequisites

Before you can perform an extract for XML V1.0, you must create LMS datasource, LMS target, and LMS type values in the LMS Setup component.

See Also

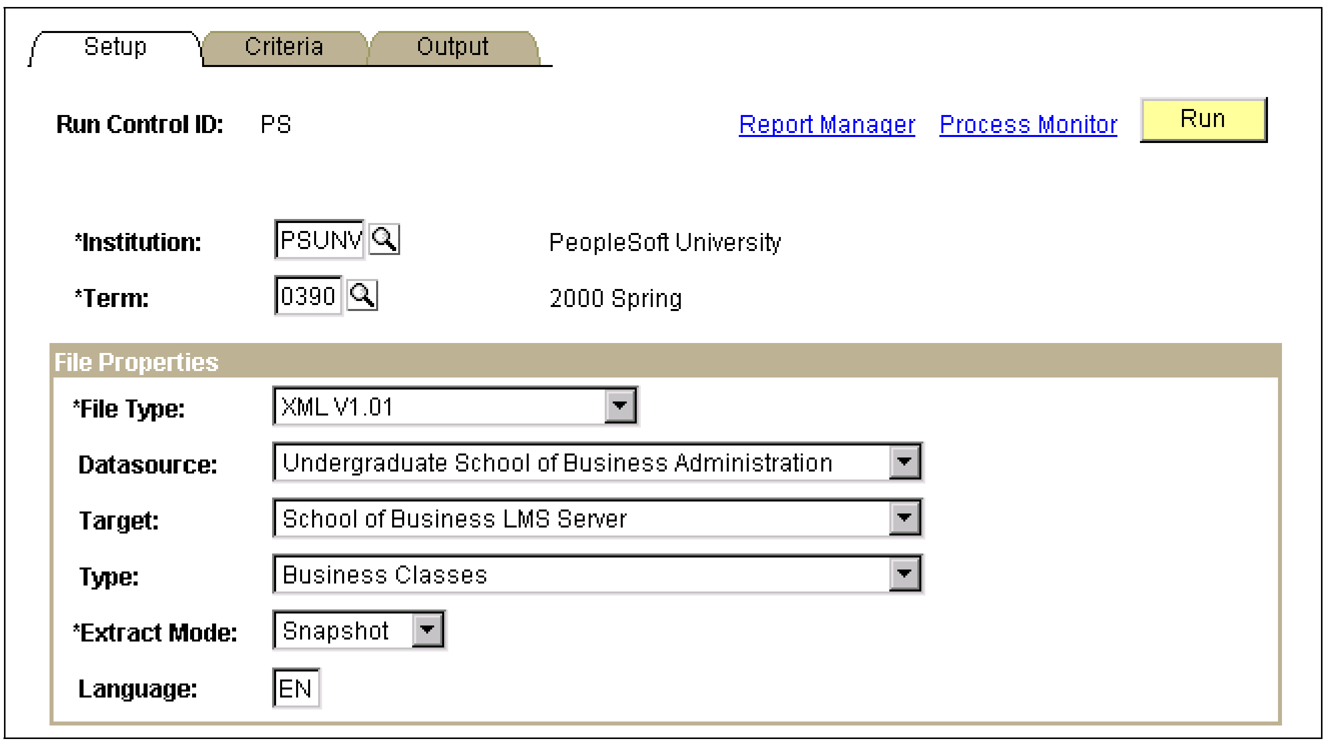
Chapter 10, "Setting Up Interoperability for Learning Management Systems," Setting Up LMS Values and Default Options, page 229

Pages Used to Extract LMS Data

Page Name	Object Name	Navigation	Usage
LMS Extract - Setup	RUNCTL_SRLMSEX1	Manage Student Records, Manage Academic Records, Process, LMS Extract, Setup	Specify properties and parameters for the extract Header Properties Object.
LMS Extract - Criteria	RUNCTL_SRLMSEX2	Manage Student Records, Manage Academic Records, Process, LMS Extract, Criteria	Further narrow your specifications for the extract process.
LMS Extract - Output	RUNCTL_SRLMSEX3	Manage Student Records, Manage Academic Records, Process, LMS Extract, Output	Specify the extract file path and storage conventions for the extract process.

Defining LMS Run Control Parameters

Access the LMS Extract - Setup page.



LMS Extract - Setup page

Institution Enter the institution that specifies the source of the extract data. This field is required.

Term Enter the term that specifies the source of the extract data. This field is required.

File Type Specify the file type, or extract format, that you would like to use. Your choices are *XML V1.01, Blackboard CourseInfo 4,* and *WebCT API Input Format.* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Note. If you select a file type of *Blackboard CourseInfo4* or *WebCT API Input Format,* the *Datasource, Target* and *Type* fields will be unavailable.

Datasource and **Target** — Enter the datasource and target that will serve as identifiers for the site generating the XML file.

Type — Enter the extract type that matches the LMS type code for those classes that you want to extract.

Extract Mode — Specify an extract mode. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. The current set of values include:

Snapshot: Full set of data for purposes of initial group creation or reloads.

Update: Partial set of changes that applies to enrollment and group membership only.

The effectiveness of the LMS extract mode of *Update* on the run control page depends on the LMS file type on the Schedule of Classes - Basic Data page. This is because Blackboard CourseInfo 4.0 standard edition and WebCT API Input Format both have limiting specifications on what data they can currently accept in update form. When running Blackboard CourseInfo 4 in update mode, only new user and new course data since the last time the process ran is accepted. When running WebCT API Input Format in update mode, only new user and new course data since the last time the process ran, and new enrollment and new course list information, is accepted.

In addition, students who dropped prior to the drop or retain date are not included in any update of the LMS extract. In other words, if you run a snapshot, then run an update prior to the drop or retain date, any students dropped since the snapshot are not updated or deleted from the LMS because their enrollments have been deleted from PeopleSoft. Develop your production refresh schedule with this in mind.

Finally, enrollments have only a date stamp. Because of this, if you run the LMS Extract process multiple times in one day in update mode, you will receive duplicated data.

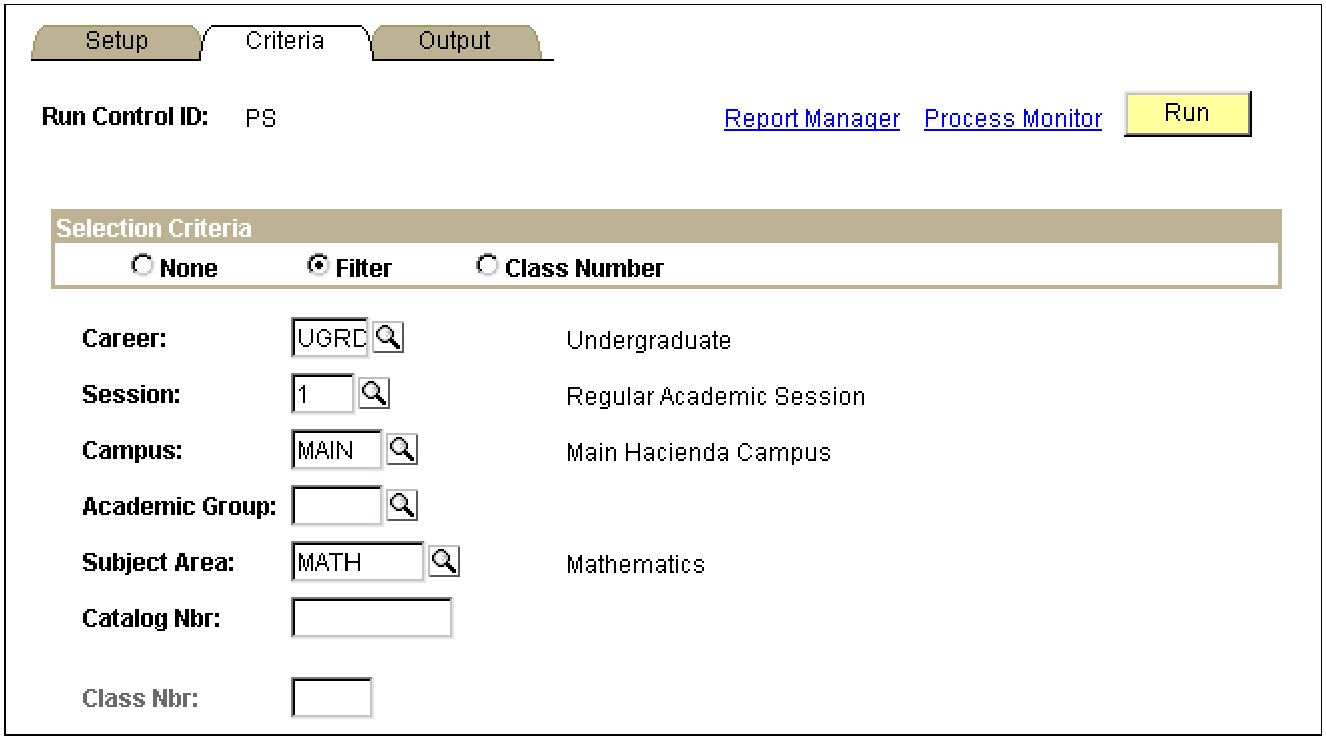
See Chapter 32, “Managing Interoperability for Learning Management Systems,” Reviewing Extract File Creation Logic, page 719.

Language — Enter a two-character language value that will serve as an attribute of the properties object. For example, <PROPERTIES lang=”en”>,ISO 639 format. This field is optional.

If you have entered all necessary data on the LMS Extract - Setup and LMS Extract - Criteria pages, click Run to run this request. PeopleSoft Process Scheduler runs the LMS Extract process at user-defined intervals.

Defining LMS Run Control Criteria

Access the LMS Extract - Criteria page.



LMS Extract - Criteria page

The fields on this page prompt against the Institution and Term values you specify on the LMS Extract - Setup page. If you do not enter any narrowing parameter information on the Criteria page, the process runs for the institution and term specified on the LMS Extract - Setup page.

Selection Criteria

Select an option to indicate the level of filtering to apply in addition to the parameters on the LMS Extract - Setup page.

None	Disables all fields.
Filter	Enables the field filters.
Class Number	Disables the field filters and enables the Class Nbr (class number) field.

Additional Elements

Career	Enter a career if you want to isolate only those courses offered under a particular academic career.
Session	Enter a session to isolate classes within the term specified on the LMS Extract - Setup page and within a particular session.
Campus	Enter a campus to filter those classes offered by a particular campus.
Academic Group	Enter an academic group to filter classes tied to a particular group.
Subject Area	Enter a subject area to filter those classes with a particular subject.

Catalog Nbr (catalog number) Enter a catalog number to isolate a particular course.

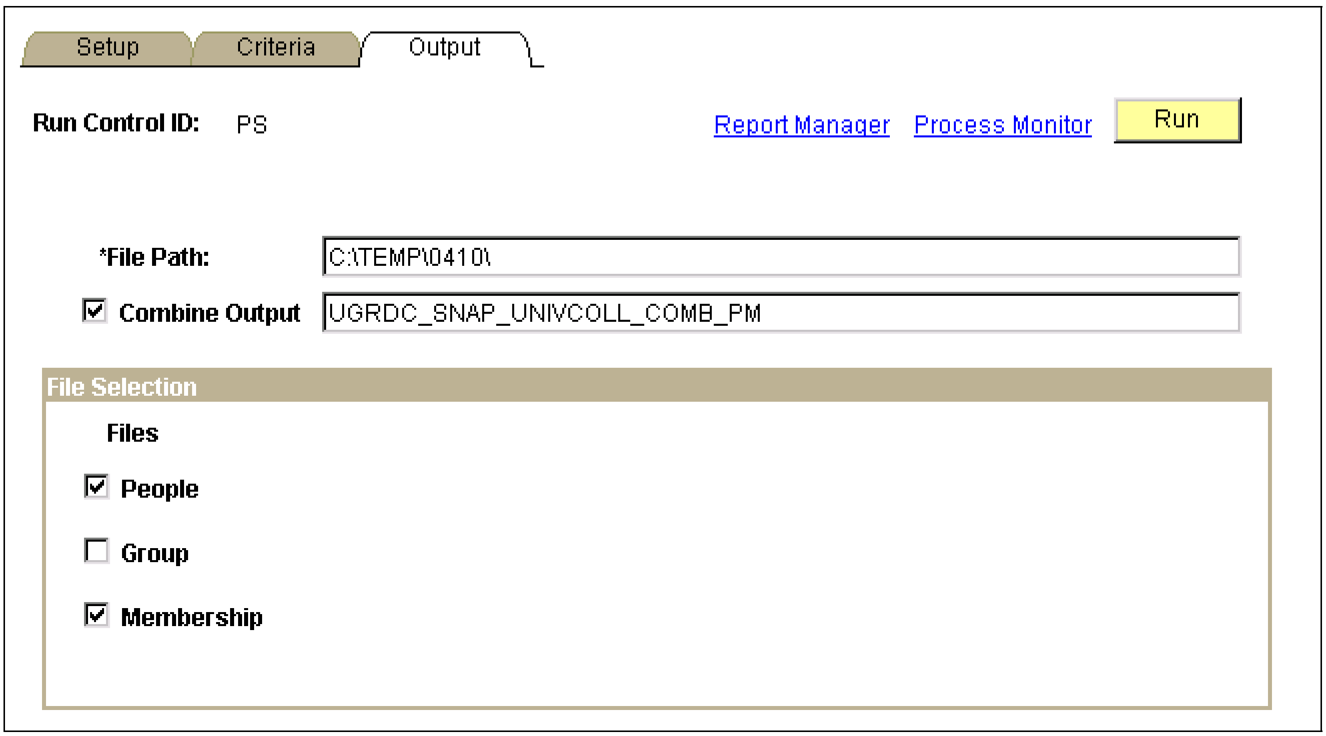
Class Nbr (class number) Enter a class number to specify a particular class offering. This field is available when the Class Number option is selected.

If you have entered all necessary data on the LMS Extract - Setup and LMS Extract - Output pages, click Run to run this request. PeopleSoft Process Scheduler runs the LMS Extract process at user-defined intervals.

Note. The system treats cleared fields as wild cards and returns all values.

Defining LMS Output Parameters

Access the LMS Extract - Output page.



LMS Extract - Output page

File Path Enter a file path to indicate the extract file location. This is where your extracted people, classes, and enrollment files are located. In addition to sending report output for this process to a file (through setting preferences in the PeopleSoft Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate Read/Write permission. If you can not locate such a folder, consult your system administrator.

Combine Output This check box is available if you select a file type of *XML V1.01* on the LMS Extract - Setup page. Select this check box to combine person, group, and membership objects into one file.

	When this check box is cleared, you can further specify the level and location of objects to extract. In doing so, you must also create individual file names for each object.
People	Select this check box to include person object data in the extract. Enter a corresponding file name for this data. This check box is unavailable if you select a file type of *WebCT API Input Format* on the LMS Extract - Setup page.
Group	Select this check box to include group object data in the extract. Enter a corresponding file name for this data.
Membership	Select this check box to include membership object data in the extract. Enter a corresponding file name for this data.

Once you enter all necessary data on the LMS Extract - Setup, LMS Extract - Criteria, and LMS Extract - Output pages, click Run to run this request. The LMS Extract process does the following:

- Collects and stores the appropriate data in an extract file (or files) with the name and file path that you specify.
- Creates an SQR .log file that provides detail about the process itself.
- Creates a detailed LMS Batch Extract report (SRLMSEX.[file extension]) that highlights the parameters, messages, and total record count for the process.

PeopleSoft Process Scheduler runs the LMS Extract Report process at user-defined intervals.

Click the Process Monitor link to access the Process Detail page, where you can view the status of submitted process requests. From the Process Detail page, select the View Log/Trace link to access the SQR .log and LMS Batch Extract report (SRLMSEX.[file extension]).

CHAPTER 33

Grading Students

This chapter provides an overview of the grading process, and discusses how to:

- Print grade rosters.
- Enter grades online.
- Enter grades through self-service Learning Management.
- Enter grades through self-service Gradebook.
- Post grades.
- Monitor mid-term deficiencies.
- Run the grade lapse process.
- Produce the student grade report.
- Review student grades and statistics.
- Audit grade changes.

See Also

Chapter 11, “Setting Up Grading,” page 235

PeopleSoft 8 SP1 Gradebook PeopleBook, “Using the Self-Service Gradebook”

Understanding Grading

Once you set up your grading schemes and grade bases, define mapping rules, and generate grade rosters, you are ready to enter grades.

You can enter grades in one of three ways:

- System administrators or power users can enter grades directly to the Grade Roster page for each class.
- Instructors can define class assignments, percentages, and even electronically communicate with students by entering grades directly through the PeopleSoft Gradebook collaborative application, a separately licensed PeopleSoft application.
- Instructors or other authorized self-service users can enter midterm and final grades through the PeopleSoft Learning Management collaborative application, a separately licensed PeopleSoft application.

See Also

PeopleSoft 8 SP1 Gradebook PeopleBook, "Using the Self-Service Gradebook"

Prerequisites

Before you can enter and post grades, you must:

- Set up your grading schemes and grade bases.
- Define mapping rules.
- Generate grade rosters.

See Also

Chapter 11, "Setting Up Grading," page 235

Printing Grade Rosters

Some organizations have business processes where grade rosters are used in printed form. This section discusses how to print grade rosters in batch or for a specific class.

Here's how to print grade rosters:

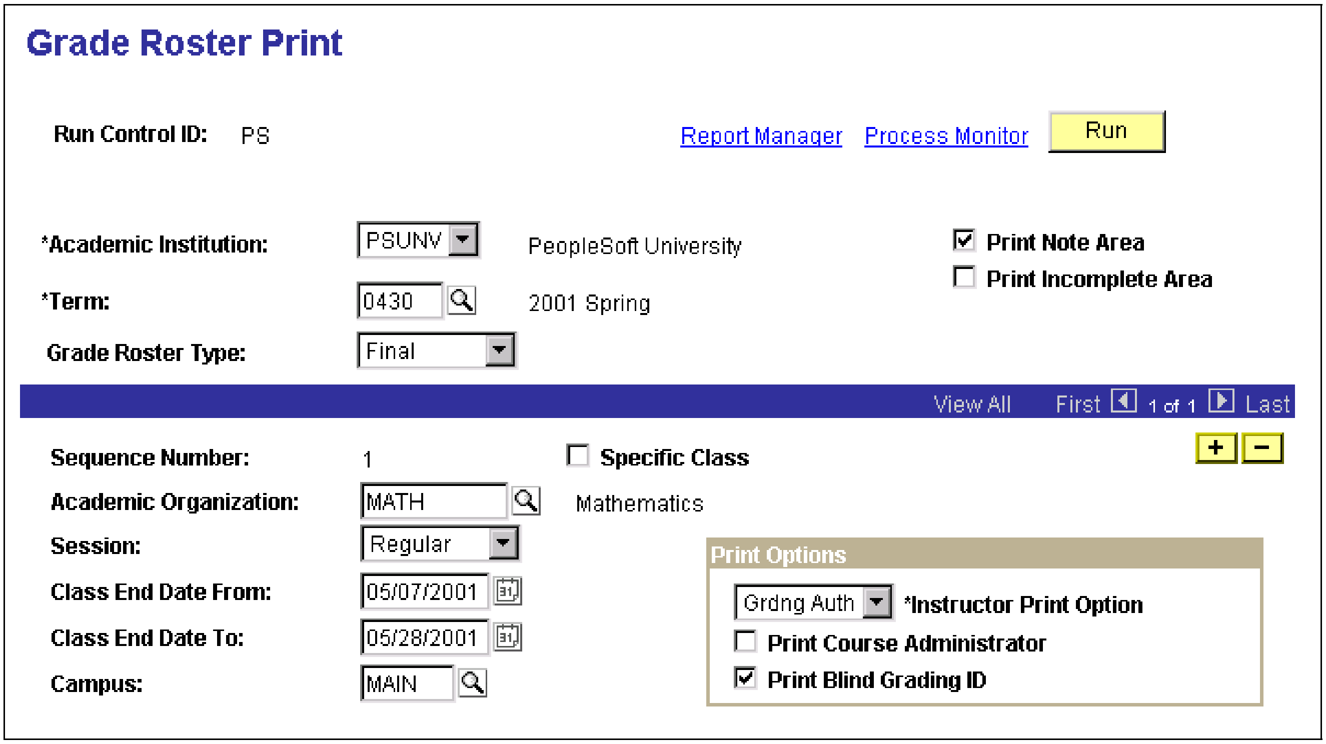
1. Access the Grade Roster Print page.
2. Enter your run control parameters.
3. Click the Run button.
4. Locate your printed rosters through the Report Manager link, and print them as needed.

Pages Used to Print Grade Rosters

Page Name	Object Name	Navigation	Usage
Grade Roster Print	RUNCTL_SRGRDROSTER	Manage Student Records, Establish Courses, Report, Grade Roster Print, Grade Roster Print	Print generated rosters.

Running the Grade Roster Report

Access the Grade Roster Print page.



Grade Roster Print page

Academic Institution	Select the institution for which to print rosters.
Term	Select a term for the roster. Term values are defined on the Term Table page.
Grade Roster Type	Select the grade roster type to print. The default is *Final.* Grade roster type values are delivered with your system as translate values. While you should not change the *Final Grade* value, you can add as many nonfinal grade values that you want.
Print Note Area	Select to provide extra space on the roster for instructors to write notes.
Print Incomplete Area	Select to provide extra space on the roster for instructors to make note of incomplete information.
Specific Class	Select to print a roster for one class.
Class Nbr (class number)	If you select the Specific Class check box, the Class Nbr field becomes available. Select the class number for the roster to print.
Academic Organization	If you do not select the Specific Class check box, select an academic organization. Academic organization values are defined on the Academic Organization Table page.
Session	Select the session for which to print rosters.
Class End Date From and **Class End Date To**	Select the class end date from and to date. The system selects rosters to print for classes with an end date that is greater than or equal to the value in the Class End Date From field and less than or equal to the value in the Class End Date To field.

Campus	Select the campus that is associated with the grade rosters. Attach campus values to courses in the course catalog and to classes in the schedule of classes.
Instructor Print Option	Select the type of instructor information to print on the grade roster for the graded component. Attach instructor values to classes on the Schedule of Classes - Basic Data page. Your choices are the following: *All:* Prints the names of all instructors. *Grdng Auth:* Prints only the name of the instructor who is authorized to grade. *None:* Prints no instructor names.
Print Course Administrator	Select to print the course administrator's name on the grade roster. Attach course administrator values to classes on the Schedule of Classes - Basic Data page.
Print Blind Grading ID	Select to print the blind grading IDs of students. The student names do not appear on the roster.

Entering Grades Online

This section discusses how system administrators or power users can enter grades directly to the Grade Roster page for each class.

Here's how to enter grades online:

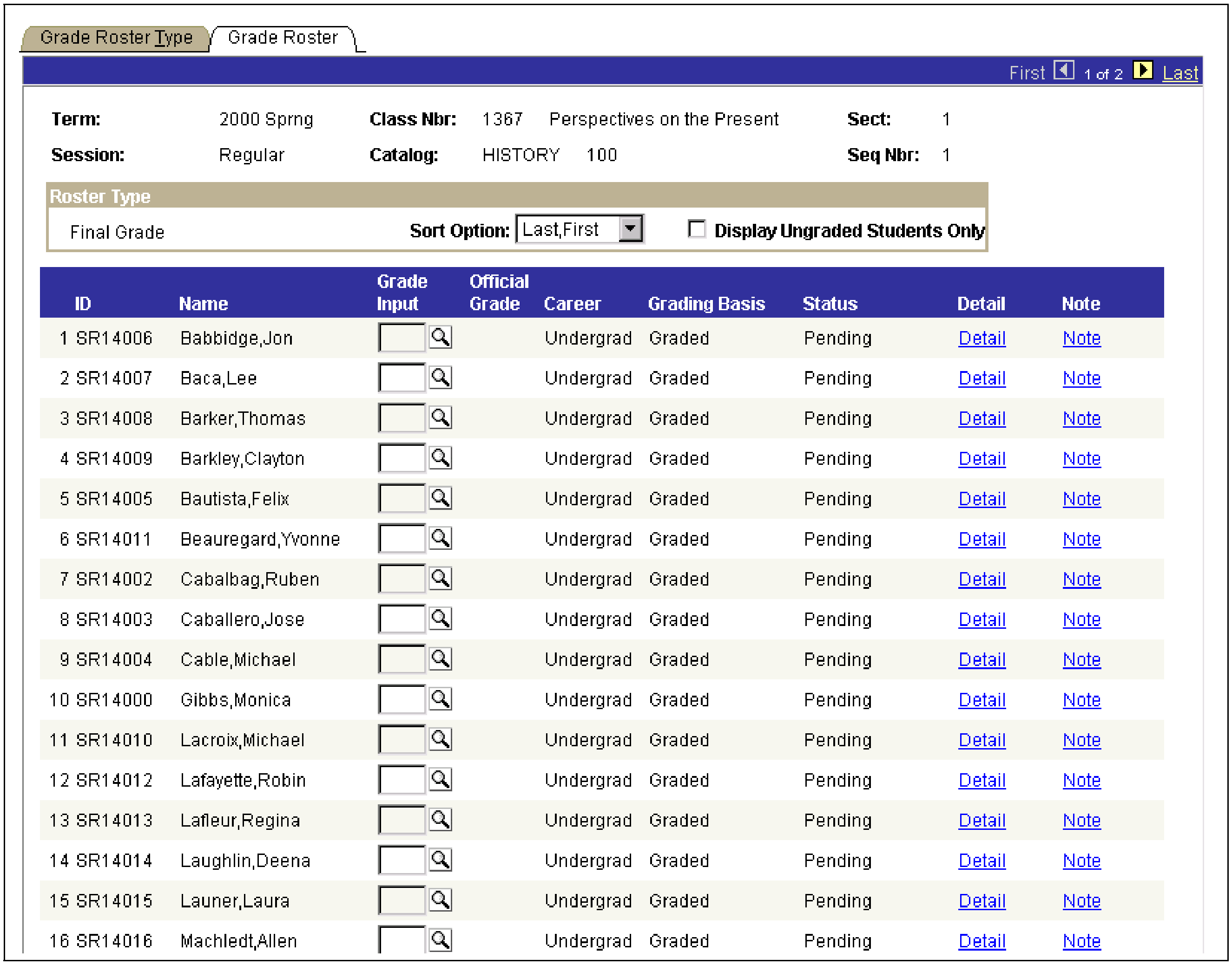
1. Enter grades and transcript notes on the Grade Roster page.
2. (Optional) Review student enrollment detail on the Student Enrollment Detail page.
3. (Optional) Enter or review a transcript note for the student on the Transcript Note page.
4. (Optional) Enter student incomplete information on the Student Incomplete page.
5. Save the grade roster.

Pages Used to Enter Grades Online

Page Name	Object Name	Navigation	Usage
Grade Roster	GRADE_ROSTER1	Manage Student Records, Establish Courses, Use, Grade Roster, Grade Roster	Enter official grades, requirement designation grades, view enrollment summary information, and add transcript notes.
Student Enrollment Detail	GRADE_ROSTER_ENRL	Click the Detail link on the Grade Roster page.	Review detailed information about the enrollment, including the student's primary academic program, grading basis, units taken, and so on.
Transcript Note	GRADE_ROSTER_NOTE	Click the Note link on the Grade Roster page.	Enter or view a transcript note that is related to the student's enrollment record. The system displays this note on transcript types where the Print Transcript Notes check box is selected on the Enrollment/Statistics page.
Student Incomplete	GRADE_ROSTER_INC	Click the Incomplete Detail button on the Transcript Note page.	Enter a lapse deadline, lapse to grade, or comment for students that have no grade or a grade that is equivalent to a grade of *Incomplete.*

Using the Grade Roster Page to Enter Grades

Access the Grade Roster page.


Grade Roster Type | Grade Roster

First 1 of 2 Last

Term: 2000 Sprng **Class Nbr:** 1367 Perspectives on the Present **Sect:** 1

Session: Regular **Catalog:** HISTORY 100 **Seq Nbr:** 1

Roster Type

Final Grade **Sort Option:** Last,First Display Ungraded Students Only

	ID	Name	Grade Input	Official Grade	Career	Grading Basis	Status	Detail	Note
1	SR14006	Babbidge,Jon			Undergrad	Graded	Pending	Detail	Note
2	SR14007	Baca,Lee			Undergrad	Graded	Pending	Detail	Note
3	SR14008	Barker,Thomas			Undergrad	Graded	Pending	Detail	Note
4	SR14009	Barkley,Clayton			Undergrad	Graded	Pending	Detail	Note
5	SR14005	Bautista,Felix			Undergrad	Graded	Pending	Detail	Note
6	SR14011	Beauregard,Yvonne			Undergrad	Graded	Pending	Detail	Note
7	SR14002	Cabalbag,Ruben			Undergrad	Graded	Pending	Detail	Note
8	SR14003	Caballero,Jose			Undergrad	Graded	Pending	Detail	Note
9	SR14004	Cable,Michael			Undergrad	Graded	Pending	Detail	Note
10	SR14000	Gibbs,Monica			Undergrad	Graded	Pending	Detail	Note
11	SR14010	Lacroix,Michael			Undergrad	Graded	Pending	Detail	Note
12	SR14012	Lafayette,Robin			Undergrad	Graded	Pending	Detail	Note
13	SR14013	Lafleur,Regina			Undergrad	Graded	Pending	Detail	Note
14	SR14014	Laughlin,Deena			Undergrad	Graded	Pending	Detail	Note
15	SR14015	Launer,Laura			Undergrad	Graded	Pending	Detail	Note
16	SR14016	Machledt,Allen			Undergrad	Graded	Pending	Detail	Note

Grade Roster page

If you are using blind grading IDs, the roster lists students in random order. If you are not using blind grading IDs, the roster lists students in ID order.

Sort Option

Sort IDs in one of two ways. Your choices are the following:

Last,First: Sorts IDs by last name.

Date,Last: Sorts IDs by fully-graded date, then by last name within start date. This view is particularly useful for classes that are offered in open entry and open exit format, where students can have fully-graded dates that differ.

Display Ungraded Students Only

Select to view ungraded students only. This is particularly useful for open entry and open exit classes where you might grade students at different intervals based on their various end dates.

Grade Input

Select the student's grade for the course. If you use the prompt to select the grade, the system populates the Official Grade field with the grade input when you exit the field.

Official Grade

The Official Grade is the posted grade, and the Status changes to *Posted* once you post grades.

Note. You can continue to revise and update the page by saving the information. As long as you do not post grades, you are able to revise. Once you post grades, you must make any revisions on a student-by-student basis on either the Enrollment Request 1 page or the Student Enrollment 1 page.

RD Grade (requirement designation grade)

If the class has a requirement designation that requires a separate grade, a grade field becomes available in the RD Grade column. Your choices are *Satisfied* and *Not Satisfied,* a basic credit or no credit type of grade.

If the requirement designation requires a separate grade, then it is assumed that the requirement designation is satisfied when a passing grade is posted for the student.

See Chapter 2, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 22.

Detail

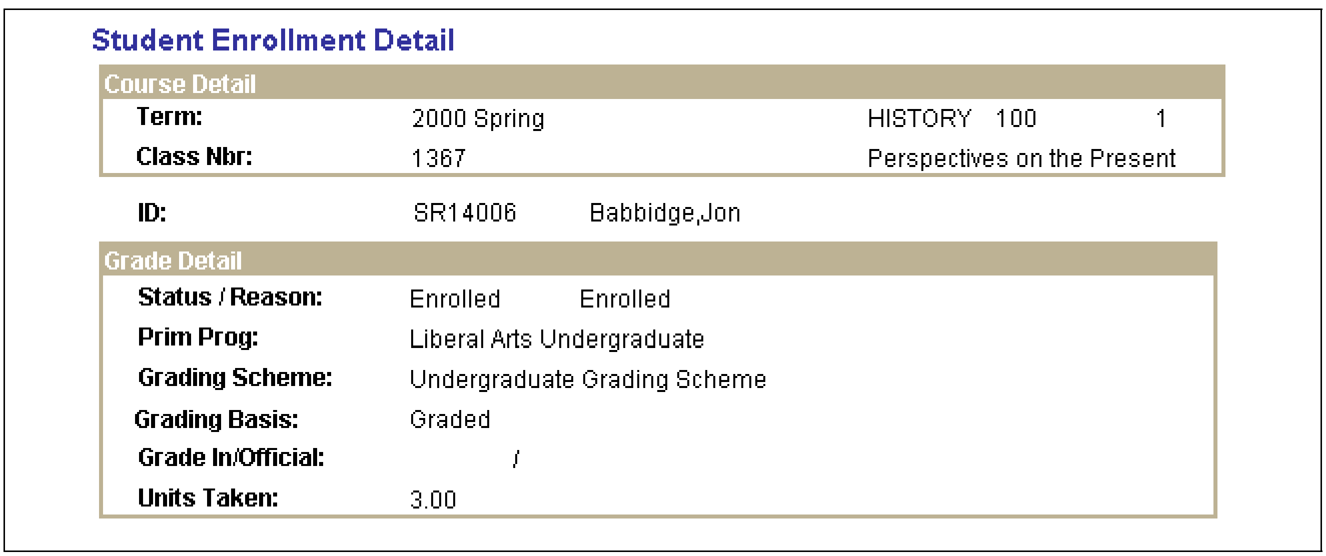
Click to access the Student Enrollment Detail page, where you can view detailed information about each enrollment.

Note

Click to access the Transcript Note page, where you can view a transcript note that is related to the student enrollment record.

Reviewing Student Enrollment Detail

Access the Student Enrollment Detail page.

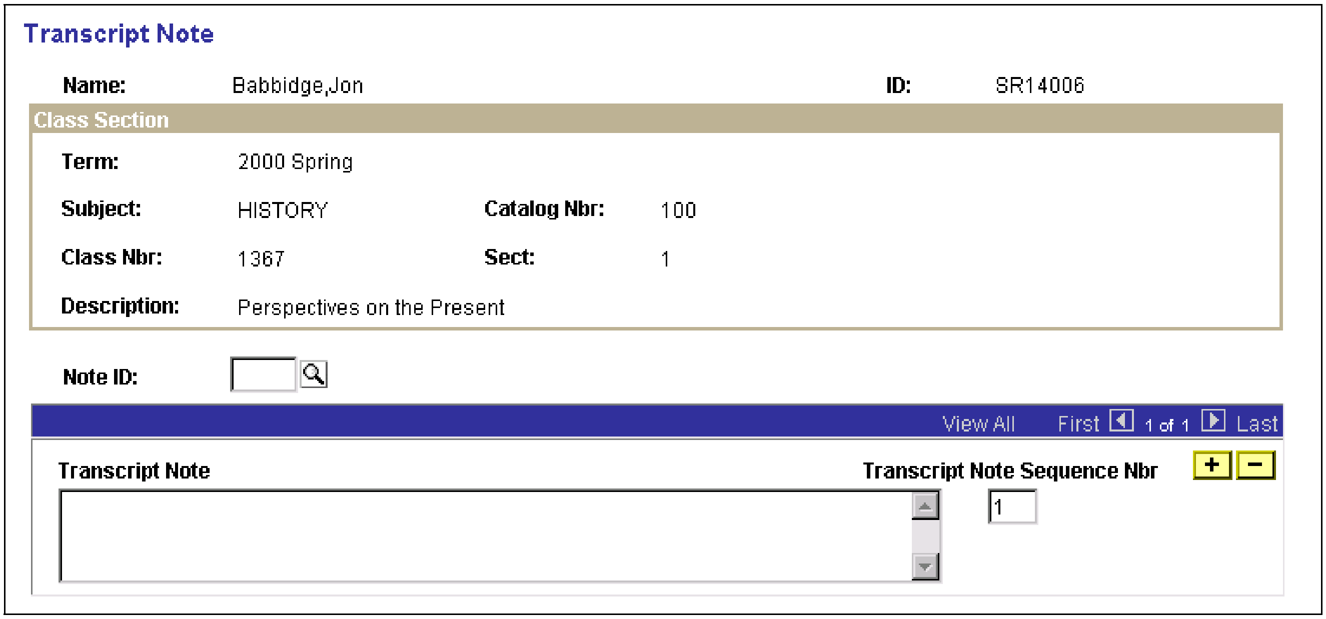


Student Enrollment Detail page

Instructors or other users of the grade roster can use the Student Enrollment Detail page to view detailed information about a student's enrollment. You can view the student's enrollment status, grading basis, units taken, and primary academic program. If you have already entered a grade for the student, you can also view the grade in and official grade.

Reviewing Transcript Notes

Access the Transcript Note page.



Transcript Note page

Note ID Select a note ID. Note ID values are defined on the Transcript Note Table page.

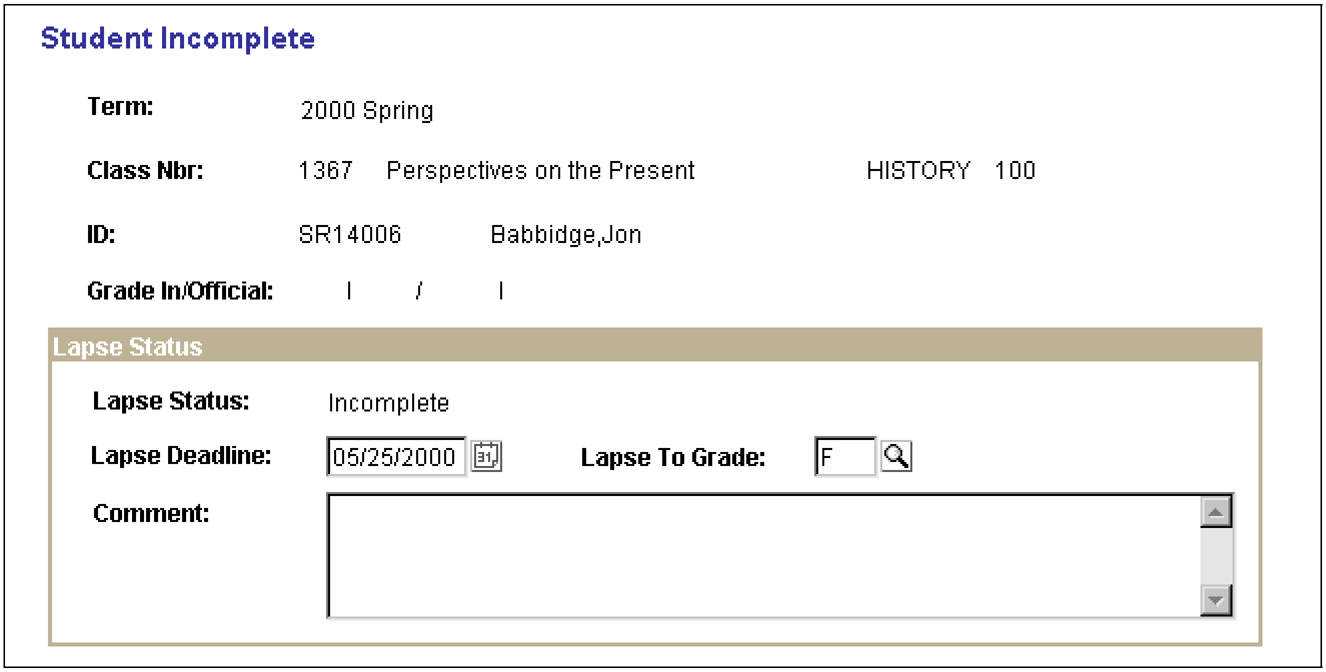
Transcript Note Enter free-form transcript note text. The system displays this text in addition to the predetermined transcript note ID text.

Transcript Note Sequence Nbr (transcript note sequence number) The system increments the transcript note sequence number for each row of free-form text. The sequence number determines the order in which the free-form transcript notes appear on the transcript (if they appear at all).

Incomplete Detail If you do not enter a grade on the Grade roster page, or if you enter a grade of *Incomplete,* the Incomplete Detail button is available. Click this button to enter data related to an *Incomplete* grade.

Reviewing Student Incomplete Information

Access the Student Incomplete page.


Student Incomplete

Term: 2000 Spring

Class Nbr: 1367 Perspectives on the Present HISTORY 100

ID: SR14006 Babbidge,Jon

Grade In/Official: I / I

Lapse Status

Lapse Status: Incomplete

Lapse Deadline: 05/25/2000 Lapse To Grade: F

Comment:

Student Incomplete page

Lapse Deadline and **Lapse To Grade**: The system populates these fields when you enter a grade of *Incomplete.* The system creates a student incomplete record when you post the *Incomplete* grade. However, you can manually enter these values. If the student has an *Incomplete* grade, you can specify the date for this grade to lapse to another grade. The Grade Lapse process does not overwrite values that are entered manually.

Comment: Enter any comments regarding the lapse grade. These do not appear on the transcript.

See Also

Chapter 33, "Grading Students," Viewing the Lapse Report Results Online, page 747

Chapter 33, "Grading Students," Defining Grade Lapse Rules, page 744

Entering Grades Through Self-Service Learning Management

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learning Management Application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Introducing Collaborative Applications".

The PeopleSoft Learning Management self-service application includes a grade roster feature that enables instructors at your organization to enter mid-term and final grades directly over the web.

Prerequisites

In order for instructors to access their mid-term and final grade rosters, you must:

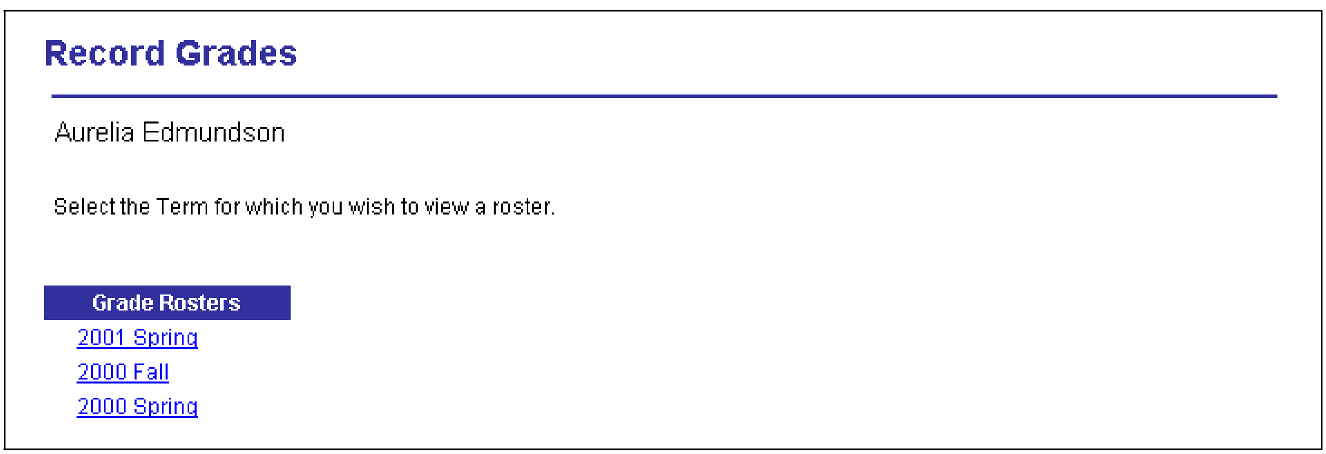
- Generate the rosters.
- Assign the instructors to classes.
- Give the assigned instructors appropriate grade roster access of Grade, Approve, or Post.

Pages Used to Enter Grades Through Self-Service Learning Management

Page Name	Object Name	Navigation	Usage
Record Grades	SS_GRD_RSTR_TERMS	SA Self Service, Learning Management, Management, Record Grades	Instructors select the term for which they want to access a grade roster.
Select Grade Roster	SS_GRDRST_LST	SA Self Service, Learning Management, Management, Record Grades, Select Grade Roster	Instructors select the course for which they want to access the grade roster.
Self-Service Grade Roster	SS_GRADE_ROSTER	SA Self Service, Learning Management, Management, Record Grades, Self-Service Grade Roster	Instructors view or enter grades, and update the roster's approval status.

Selecting the Term to Grade

Access the Record Grades page.

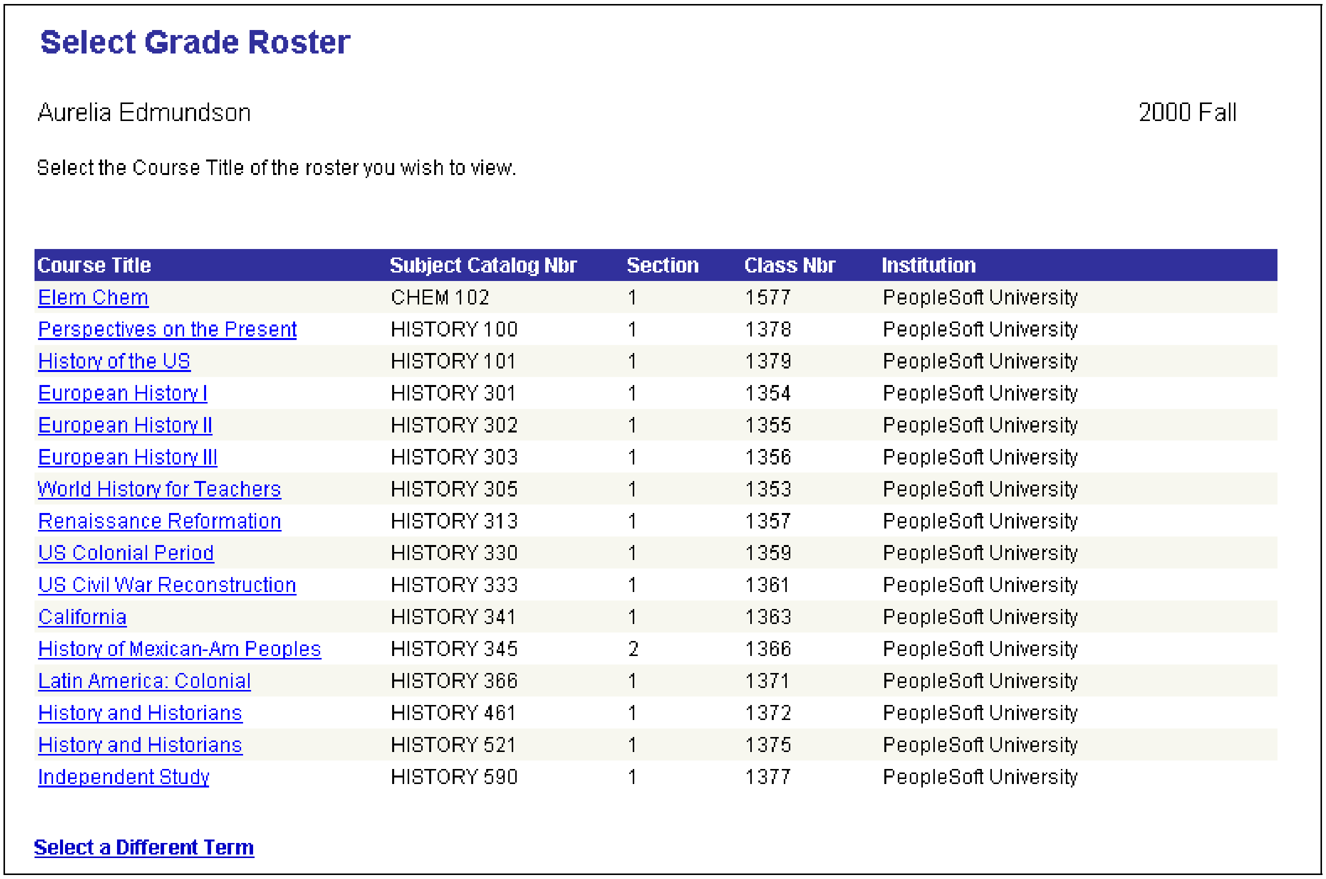


Record Grades page

Instructors can click the Grade Rosters term link to access the Select Grade Roster page, where they can view their classes for the term.

Selecting the Class to Grade

Access the Select Grade Roster page.



Select Grade Roster

Aurelia Edmundson 2000 Fall

Select the Course Title of the roster you wish to view.

Course Title	Subject Catalog Nbr	Section	Class Nbr	Institution
Elem Chem	CHEM 102	1	1577	PeopleSoft University
Perspectives on the Present	HISTORY 100	1	1378	PeopleSoft University
History of the US	HISTORY 101	1	1379	PeopleSoft University
European History I	HISTORY 301	1	1354	PeopleSoft University
European History II	HISTORY 302	1	1355	PeopleSoft University
European History III	HISTORY 303	1	1356	PeopleSoft University
World History for Teachers	HISTORY 305	1	1353	PeopleSoft University
Renaissance Reformation	HISTORY 313	1	1357	PeopleSoft University
US Colonial Period	HISTORY 330	1	1359	PeopleSoft University
US Civil War Reconstruction	HISTORY 333	1	1361	PeopleSoft University
California	HISTORY 341	1	1363	PeopleSoft University
History of Mexican-Am Peoples	HISTORY 345	2	1366	PeopleSoft University
Latin America: Colonial	HISTORY 366	1	1371	PeopleSoft University
History and Historians	HISTORY 461	1	1372	PeopleSoft University
History and Historians	HISTORY 521	1	1375	PeopleSoft University
Independent Study	HISTORY 590	1	1377	PeopleSoft University

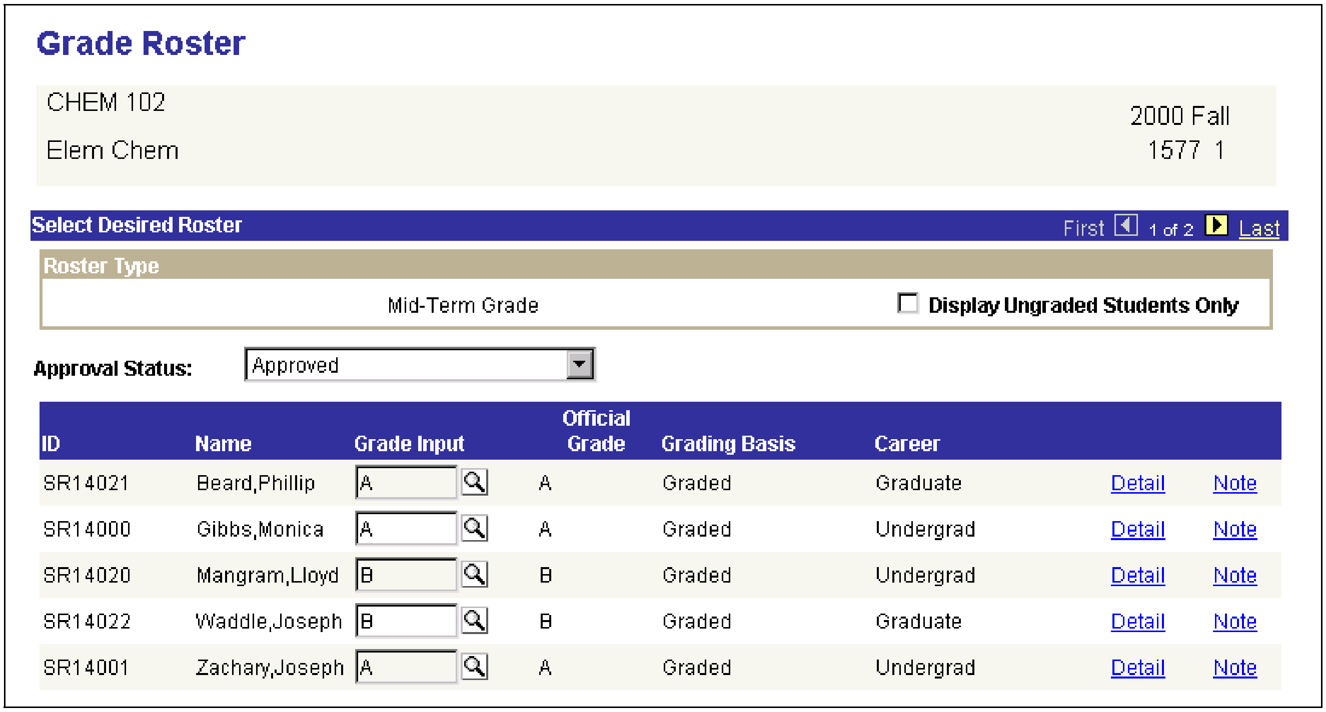
Select a Different Term

Select Grade Roster page

Instructors can click the Course Title link to access the Self-Service Grade Roster page, where they can enter mid-term and final grades.

Entering Mid-Term and Final Grades

Access the Grade Roster page.


Grade Roster

CHEM 102
Elem Chem

2000 Fall
1577 1

Select Desired Roster — First 1 of 2 Last

Roster Type: Mid-Term Grade — Display Ungraded Students Only

Approval Status: Approved

ID	Name	Grade Input	Official Grade	Grading Basis	Career		
SR14021	Beard,Phillip	A	A	Graded	Graduate	Detail	Note
SR14000	Gibbs,Monica	A	A	Graded	Undergrad	Detail	Note
SR14020	Mangram,Lloyd	B	B	Graded	Undergrad	Detail	Note
SR14022	Waddle,Joseph	B	B	Graded	Graduate	Detail	Note
SR14001	Zachary,Joseph	A	A	Graded	Undergrad	Detail	Note

Self-Service Grade Roster page

Instructors can use the Approval Status field to update the status of the roster before they save it. Choices are *Not Reviewed, Ready for Review,* and *Approved.* A status of *Approved* is required in order to post the roster.

Instructors can enter mid-term or final grades in the Grade Input field, and they can click the Detail link and the Note link to access the Student Enrollment Detail page and the Transcript Note page, respectively. The Note link is only available with a roster type of *Final Grade.*

Entering Grades Through the Self-Service Gradebook

In addition to the grade methods mentioned in the previous section, instructors can use PeopleSoft Gradebook to enter grades for individual assignments, quizzes, and tests, mid-term grades, and final grades. The PeopleSoft Gradebook application is a separately licensed collaborative application.

See Also

PeopleSoft 8 SP1 Gradebook PeopleBook, “Using the Self-Service Gradebook”

Posting the Grade Roster

Posting the grade rosters is an important step, because it officially assigns final class grades to the students’ career term records.

You can post grades in the following two ways:

- Post grades for a single class on the Grade Roster page.

- Post grades for multiple classes on the Grade Post page.

Here's how to post grades for a single class:

1. (Optional) To perform a partial post of grades, select the Partial Post check box and click the Post button on the Grade Roster page.
2. To post the entire grade roster, clear the Partial Post check box and click the Post button on the Grade Roster page.

Here's how to post grades for multiple classes:

1. Access the Grade Post page and specify the institution, term, and partial post option for which you want to post grades.
2. (Optional) Narrow the batch for which you want to post grade rosters by entering any of the following values:

   Session

   End date

   Academic Organization

   Subject Area
3. (Optional) Add rows as needed.
4. Click the Run button.

Prerequisites

Before you can post grades, you must:

- Generate the grade rosters.
- Enter grades on the Grade Roster page or enter grades through the PeopleSoft Gradebook application.

See Also

Chapter 11, "Setting Up Grading," page 235

Pages Used to Post Grade Rosters

Page Name	Object Name	Navigation	Usage
Grade Roster Type	GRADE_ROSTER_TYPE	Manage Student Records, Establish Courses, Use, Grade Roster, Grade Roster Type	Click the Post button on the Grade Roster Type page to post grades on a course-by-course basis. For partial posting, select the Partial Post check box before you click the Post button.
Grade Post	RUNCTL_GRD_POST	Manage Student Records, Establish Courses, Process, Grade Post, Grade Post	Use the Grade Post page to post grades for multiple classes. You can post grades for multiple classes within an academic organization or subject area.

Posting Grades for a Single Class

Access the Grade Roster Type page. Click the Post button to post grades on a course-by-course basis. For partial posting, select the Partial Post check box before you click the Post button.

See Also

Chapter 11, "Setting Up Grading," Creating Grade Rosters for a Single Class, page 248

Posting Grades for Multiple Classes

Access the Grade Post page.

Grade Post page

Academic Institution Select the academic institution for the grade posting. This value determines which terms, sessions, and other field values are available.

Term Select the term for the grade posting. Term values are defined on the Term Table page.

Session Select the session for the grade posting. Session is an optional field. Session values are defined on the Session Table page.

End Date If you enter a session value, you must also enter an end date for the session. The end date is the last date of the session.

Academic Organization Select either an academic organization or a subject area in which to post grades. Academic organization values are defined on the Academic Organization Table page.

Subject Area Select either an academic organization or a subject area in which to post grades. Subject area values are defined on the Academic Subject Table page.

Partial Post Option Select to post only those grades that you enter and save on the roster. Later, you can enter the remaining grades and post those. Your choices are the following:

Yes: Select to partially post all rosters in your parameters, regardless of whether or not the rosters are missing grades. The batch grade post process performs a partial post on all grade rosters, regardless of whether you selected the Partial Post check box on the Grade Roster Type page.

No: Select to post only rosters that have a status of *Approved*. This option does not permit a reposting of the same roster type.

Note. Once the system posts the grades, all statistics accumulate. If there are any revisions needed on individual records, you must make these on a student-by-student basis on either the Enrollment Request 1 page or the Student Enrollment 1 page.

Monitoring Midterm Deficiencies

This section provides an overview of midterm deficiency reporting, and discusses how to:

- Generate a report of midterm deficient grade records according to criteria that you define.
- Create mid-term deficiency letters for students with deficient mid-term grades.

Understanding Mid-Term Deficiency Reporting

The Mid-Term Deficiency process generates a report that lists students with deficient midterm grades. Deficient grades are those grades with a grade input value that is equal to the value in the Grade Input field on the Mid-term Deficiency Report page. In addition, the report places the identified students into the Communication tables so that you can generate a letter informing them of their deficient grade.

See Also

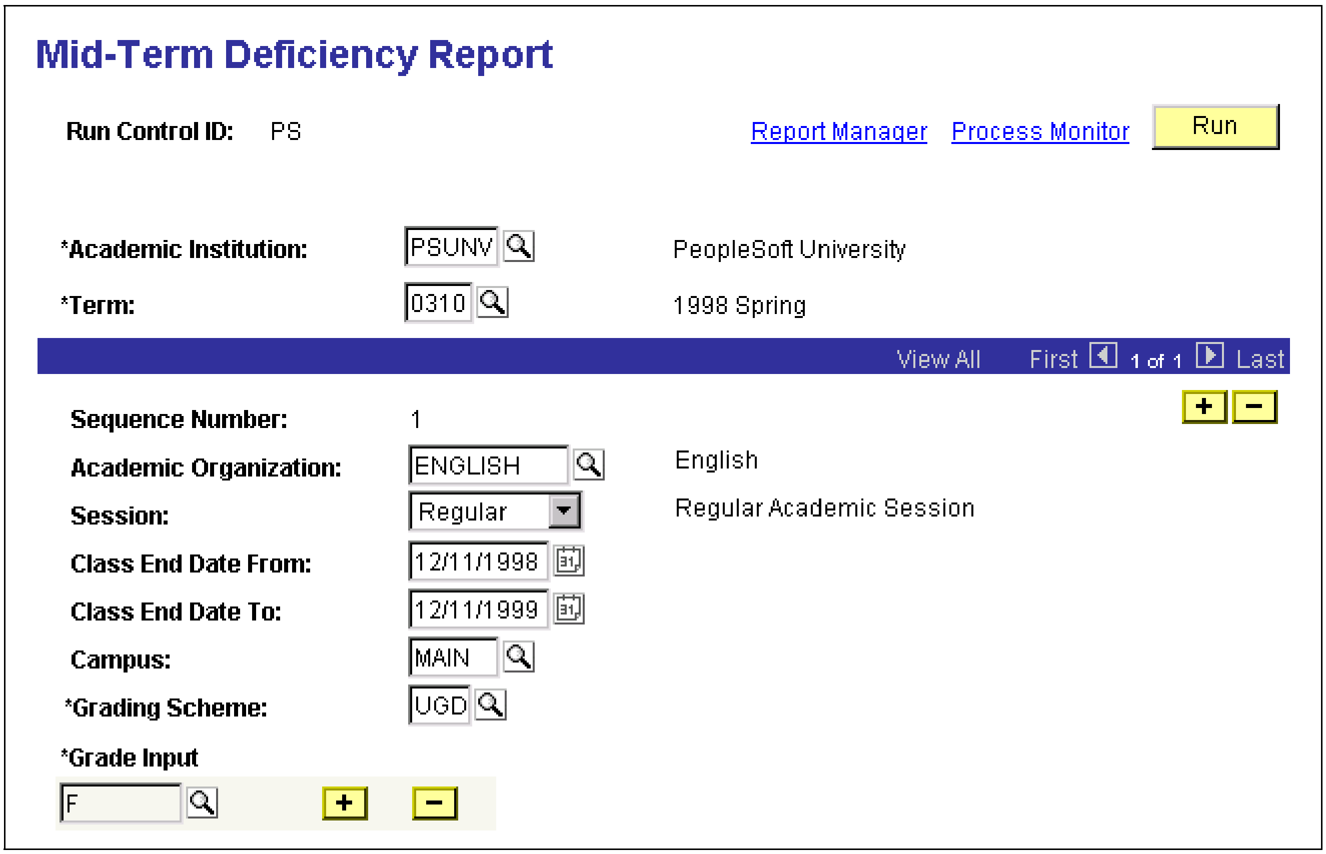
PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Communications,” Defining Communication Speed Keys

Page Used to Monitor Midterm Deficiencies

Page Name	Object Name	Navigation	Usage
Mid-Term Deficiency Report	RUNCTL_SRTRMDEFCNY	Manage Student Records, Establish Courses, Report, Mid-Term Deficiency, Mid-Term Deficiency Report	Produce a summary report of all students whose grades are deficient during the midterm for each class.

Generating the Mid-Term Deficiency Report

Access the Mid-Term Deficiency Report page.



Mid-Term Deficiency Report page

The system inserts the IDs of all students with deficient grades into the Communication table so that you can easily identify them and create individual warning letters.

Academic Institution Select an academic institution for which to evaluate students.

Term Select a term for the system to use as it searches for student enrollment records. Term values are defined on the Term Table page.

Academic Organization Select an academic organization for the system to use as it searches for records. Academic organization values are defined on the Academic Organization Table page.

Session	Select a session for the system to use as it searches for records. Session values are defined on the Session Table page.
Class End Date From and **Class End Date To**	Select the class end date from and to value. The value in this field and in the Class End Date To field further narrow your processing parameters. The system evaluates enrollment records for classes that are active between these dates and within all other parameters you specify.
Campus	Select a campus for the system to use as it searches for records. Campus values are defined on the Campus Table page.
Grading Scheme	Select a grading scheme to prompt for appropriate grades in the Grade Input field. Grading scheme values are defined on the Grading Scheme Table page.
Grade Input	Select the grade that the system should seek to identify whether a student is midterm deficient.

Click Run to run the report using PeopleSoft Process Scheduler. The process populates the Communication table with IDs for students with deficient grades. Later, you can produce a letter to inform them of their status.

Generating Letters for Midterm Deficiencies

Here's how to generate letters:

1. Set up midterm deficiency keys on the Communication Speed Key page.

   Once you set these parameters you do not have to set them each time your run the report. Select the Administrative Function of *STRM,* which is a delivered value.
2. Set the Comm Key (communication key) for the midterm deficiency report.
3. Enter the Description and Short Description.
4. Select the Category.
5. Select the Context.
6. Select the Method as *L* for *Letter.*
7. Select the Direction as *OUT.*
8. Select the Letter Code *MAD,* for Mid-Term Academic Deficiency Warning letter.
9. Save the communication key.
10. Generate letters.

Running the Grade Lapse Process

This section provides an overview of the grade lapse process and discusses how to:

- Define grade lapse rules.
- Run the grad elapse process.
- View the lapse report results.

Understanding the Grade Lapse Process

Use the Grade Lapse process to convert posted *In-progress* or *Incomplete* grades to some other grade you specify. You can define grades as *In-progress* on the Grade Scheme table.

Typically, you run the Grade Lapse process two to three weeks after all grades are in and posted. Your lapse deadline can be prior to the processing date.

Here's how to run the Grade Lapse process:

1. Define grade lapse rules for your academic programs on the Incomplete page.
2. Enter and post grades for a given time period.
3. Run the Grade Lapse process on the Grade Lapse page.
4. View new, lapsed grades on the Incomplete page.

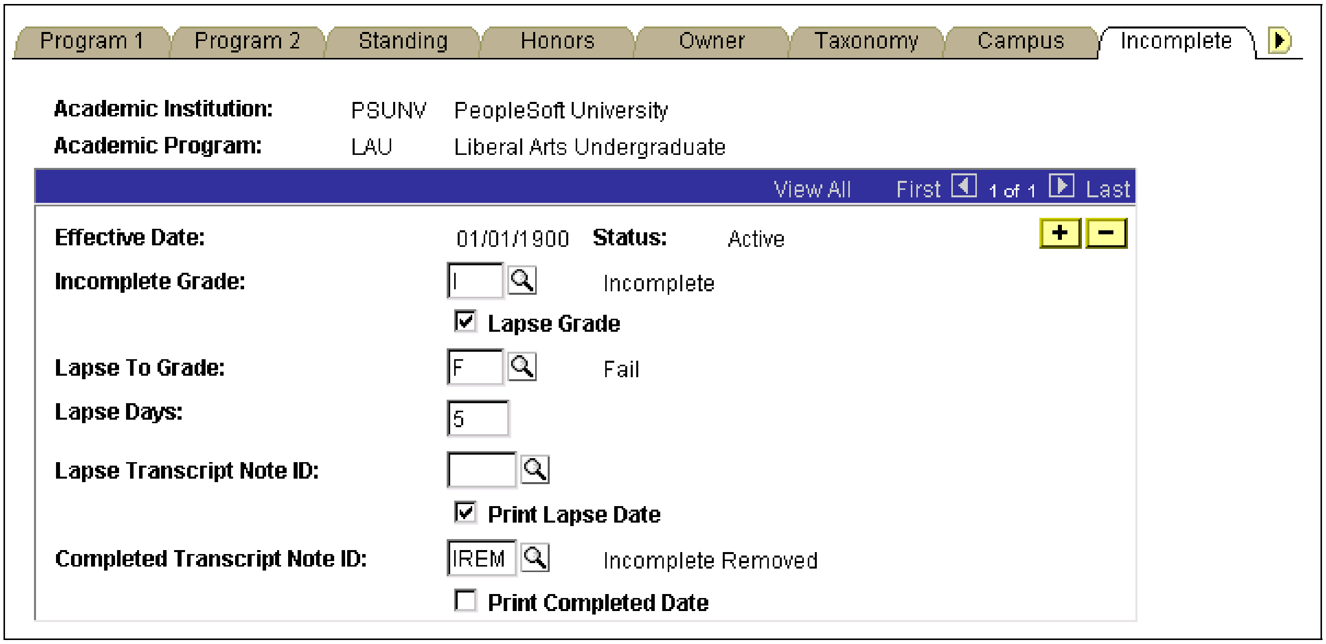
Once you set up your grade lapse rules, you can run the Grade Lapse process at any time. The Grade Lapse process uses the lapse grade that you indicate to populate the Student Incomplete page. Later, you can post the new grade.

Pages Used to Run the Grade Lapse Process

Page Name	Object Name	Navigation	Usage
Incomplete	INCOMPLETE_GRADE	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Incomplete	Define grade lapse rules for academic programs. Each rule defines the grade that your incomplete grades lapse to when you run the report and what related transcript notes (if any) appear on a student's transcript.
Grade Lapse	RUNCTL_SR_GRD_LPS	Manage Student Records, Establish Courses, Process, Grade Lapse, Grade Lapse	Enter processing parameters for the Grade Lapse process and to run the process.
Student Incomplete	STDNT_INCOMPLETE	Manage Student Records, Manage Academic Records, Use, Student Incomplete, Student Incomplete	Review the Grade Lapse process results for an individual student.

Defining Grade Lapse Rules

Access the Incomplete page.



Incomplete page

Incomplete Grade

Enter a value that you define as an incomplete grade for students that are active in this program. Add rows as appropriate. This grade lapses to the value in the Lapse To Grade field as a result of the Grade Lapse process *only* if you select the Lapse Grade check box. If you neither select the Lapse Grade check box, nor enter a Lapse To Grade value, the system never lapses the incomplete grade. Grade values are defined on the Grading Scheme Table page.

Lapse Grade

Select to use the lapse grade rules for this incomplete grade. Some incomplete grades may not have lapse rules attached to them (in which case you would leave the Lapse To Grade field cleared.) If you do not select this check box, the system does not change incomplete grades to any lapse grade value for classes taken in this academic program, and the lapse transcript note ID does not appear.

Lapse To Grade

Select the lapse to grade value (if any). Grade values are defined on the Grading Scheme Table page.

Lapse Days

Enter the number of days past the fully-graded date (as defaulted from the Term Calendar 3 page to the student career term record during term activation) that an incomplete grade can stay on a student's record. Lapse days function as a grace period.

For example, let's say that at PSUNV, the fully-graded date for the undergraduate academic career (*UGRD*), term 0330, regular session (1) is 12/01/01.

If the institutional policy at PSUNV for the LAU academic program allows a student to make up incomplete grades for one month past the term's end, you would enter *30* in the Lapse Days field. When you run the Grade Lapse process, use 1/10/02 as the lapse deadline. This way, you can be sure that all students who might make up an incomplete have done so and that the grades have been entered and posted. The additional 10 days provide you with time to post grades.

Note. Run the grade lapse report after all grades are in and posted. This can be after your lapse day's deadline.

Lapse Transcript Note ID — Select the transcript note ID for the lapse grade. Transcript note IDs are defined on the Transcript Note Table page.

Print Lapse Date — Select to display the lapse date on the student's transcript. The system uses the lapse days value to generate the lapse date. It does *not* use the lapse process date.

Completed Transcript Note ID — Select the transcript note ID that appears once the student's final grade is posted. Transcript note IDs are defined on the Transcript Note Table page.

Print Completed Date — Select to display the completed date on the student's transcript.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Programs

Running the Grade Lapse Process

Access the Grade Lapse page.

Grade Lapse page

The Grade Lapse process converts the original *Incomplete* grade to the lapse grade. In addition, the process creates a report that lists all enrollment request numbers for grades that it lapses.

It is best to run this process two to three weeks *after* all grades are entered and posted. Your lapse deadline should be before the date you run the process.

Institution — Select the institution that the system uses to limit the scope of the process. The selected value defines which careers are valid.

Career — Select the academic career that the system uses to limit the scope of the process. The system evaluates students with enrollment records for this career.

Term — Select the term that the system should use to limit the scope of the process. The system evaluates students with enrollment records for this career and term.

Lapse Deadline

Select the lapse date deadline to specify the date for grades to lapse (change from their original grade to the *lapse to* grade). The lapse deadline must be greater than or equal to the fully-graded date plus the lapse days. The fully-graded date is set up on the Term Calendar 3 page, and the system populates this value by default to the student career term record during term activation, or during the term activation update process. It is the date that the institution expects to have all grades posted for a particular career, term, and session. Lapse days are defined for an academic program and grade on the Incomplete page in the Academic Program Table component.

The Grade Lapse process looks at all of the student incomplete records that meet your processing parameters. It then uses the lapse deadline to determine which students have *Incomplete* grades on their records and converts those students' grades to the Lapse Grade value that you define on the Incomplete page in the Academic Program Table component.

Subsequent processes pick up any new *Incomplete* grades that you enter. You can run this process as many times as you need for a specific term and career.

Warning! The Grade Lapse process does not convert *Incomplete* grades that you have entered on the Student Enrollment 1 page. *Incomplete* grades that you enter on this page do not have a corresponding row in the incomplete table.

Academic Program

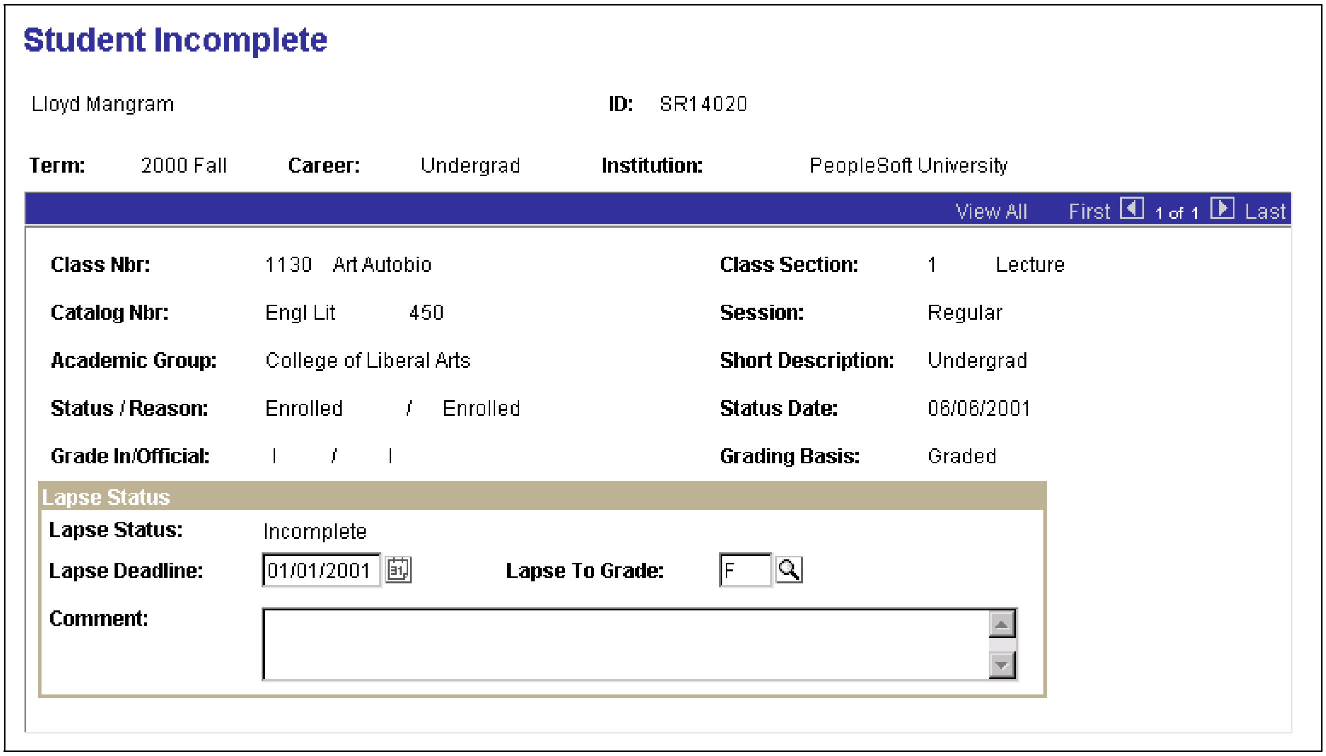
Because different programs can have different lapse rules, select the academic program that the system uses to limit the scope of the population to process. Academic Program is an optional field.

Click Run to run this request. PeopleSoft Process Scheduler runs the Grade Lapse process at user-defined intervals.

Running the PSJob on the server generates the Grade Lapse report and automatically posts the transaction.

Viewing the Lapse Report Results Online

Access the Student Incomplete page.



Student Incomplete

Lloyd Mangram **ID:** SR14020

Term: 2000 Fall **Career:** Undergrad **Institution:** PeopleSoft University

View All First 1 of 1 Last

Class Nbr:	1130 Art Autobio	**Class Section:**	1 Lecture
Catalog Nbr:	Engl Lit 450	**Session:**	Regular
Academic Group:	College of Liberal Arts	**Short Description:**	Undergrad
Status / Reason:	Enrolled / Enrolled	**Status Date:**	06/06/2001
Grade In/Official:	I / I	**Grading Basis:**	Graded

Lapse Status

Lapse Status: Incomplete

Lapse Deadline: 01/01/2001 **Lapse To Grade:** F

Comment:

Student Incomplete page

Lapse Deadline and **Lapse to Grade**	The grade post process populates the Lapse Deadline and Lapse to Grade fields. However, you can manually enter these values. If the student has an incomplete grade, you can specify the date for this incomplete grade to lapse to another grade. The process does not overwrite values that you enter manually.
Comment	Enter any comments regarding the lapse grade. The comments do not appear on the transcript.

Producing the Student Grade Report

This section discusses how to produce the student grade report.

Prerequisite

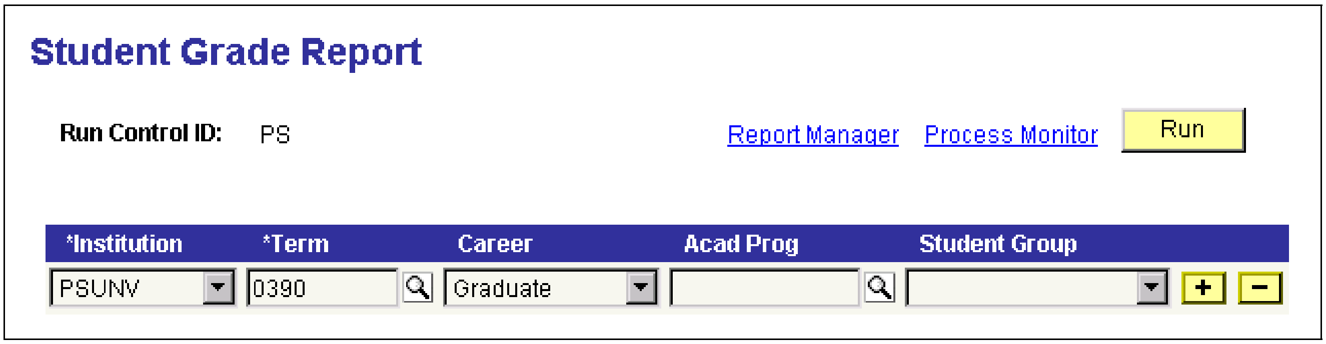
Post grades for the institution and term that you process.

Pages Used to Produce the Student Grade Report

Page Name	Object Name	Navigation	Usage
Student Grade Report	RUNCTL_SRGRDRPT	Manage Student Records, Manage Academic Records, Report, Student Grade Report, Student Grade Report	Produce student grade reports for students in a particular academic career, program, or student group.

Running the Student Grade Report

Access the Student Grade Report page.



Grade Report page

Term Select a term for the student grade report. Term values are defined on the Term Table page.

Academic Career Select the academic career for which the system should limit the report. Academic career values are defined on the Academic Career Table page.

Academic Program Select an academic program for which the system should limit the report. Academic program values are defined on the Academic Program Table component.

Student Group Select a student group for which the system should limit the report. Student group values are defined on the Student Group Table page.

Viewing Student Grades and Statistics

When you post grades, the system calculates term statistics. You can use the Student Grade Inquiry component to view a student's grades and statistics for the term.

Prerequisites

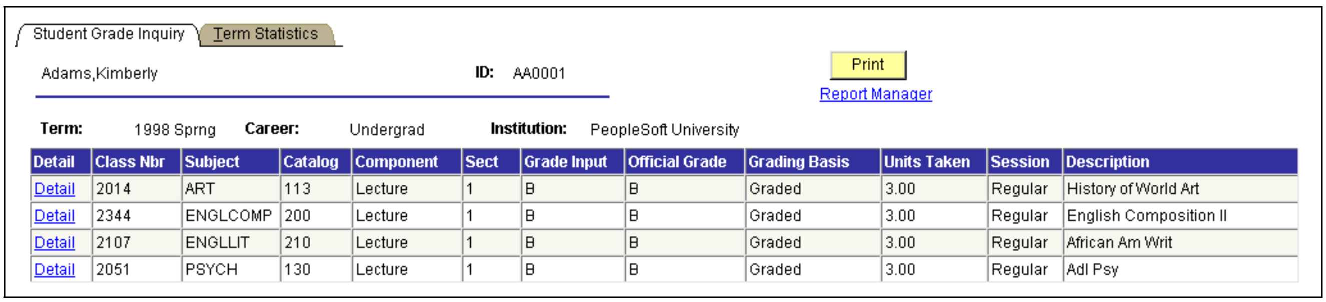
Before you can review term statistics, you must first post grades for the term.

Pages Used to Review Grades and Statistics

Page Name	Object Name	Navigation	Usage
Student Grade Inquiry	STDNT_GRADE_INQ	Manage Student Records, Manage Academic Records, Inquire, Student Grades, Student Grade Inquiry	Review grades for a student within a term.
Term Statistics	TERM_STATISTICS	Manage Student Records, Manage Academic Records, Use, Term History, Term Statistics	Review a student's current term statistics.

Viewing Student Grades

Access the Student Grade Inquiry page.


Student Grade Inquiry | Term Statistics

Adams,Kimberly ID: AA0001 Print Report Manager

Term: 1998 Sprng Career: Undergrad Institution: PeopleSoft University

Detail	Class Nbr	Subject	Catalog	Component	Sect	Grade Input	Official Grade	Grading Basis	Units Taken	Session	Description
Detail	2014	ART	113	Lecture	1	B	B	Graded	3.00	Regular	History of World Art
Detail	2344	ENGLCOMP	200	Lecture	1	B	B	Graded	3.00	Regular	English Composition II
Detail	2107	ENGLLIT	210	Lecture	1	B	B	Graded	3.00	Regular	African Am Writ
Detail	2051	PSYCH	130	Lecture	1	B	B	Graded	3.00	Regular	Adl Psy

Student Grade Inquiry page

Print Click to print the grade information.

Detail Click to access the Class Details page, where you can view class information.

Viewing Term Statistics

Use the Terms Statistics page to view a student's current term statistics.

See Also

Chapter 27, "Viewing Class Enrollment Data," Viewing Term Statistics for a Single Term, page 599

Auditing Grade Changes

This section provides an overview of grade change auditing, and discusses how to audit changes made to student grades.

Understanding Grade Change Audits

PeopleSoft Student Administration provides grade change audit functionality that captures and displays detailed information about grade changes made through online pages, batch processes, and SQL. Specifically, the system tracks and writes an audit record to the grade change audit table for each of the following changes:

- Online changes to the GRADE_INPUT field (on the Enrollment Request page or the Student Enrollment 1 page).
- Batch changes to the GRADE_INPUT field (on the Grade Lapse Process page).
- SQL changes to the Grade Input field.

The grade change audit table captures the entire PS_STDNT_ENRL record and stores an image of the record before and after the change. The system date and time stamps and marks each record in the audit table as a before or after image.

Here's how to audit grade changes:

1. Enter the parameters that define your audit group on the Grade Change Audit page.
2. Select the View Changes Only check box to see only changes to original grades. Clear the View Changes Only check box to see both original grades and subsequent grade changes.
3. Click the Search button to retrieve your results.
4. Review the results of your search on the following tabs:

   Change Detail

   Units and GPA

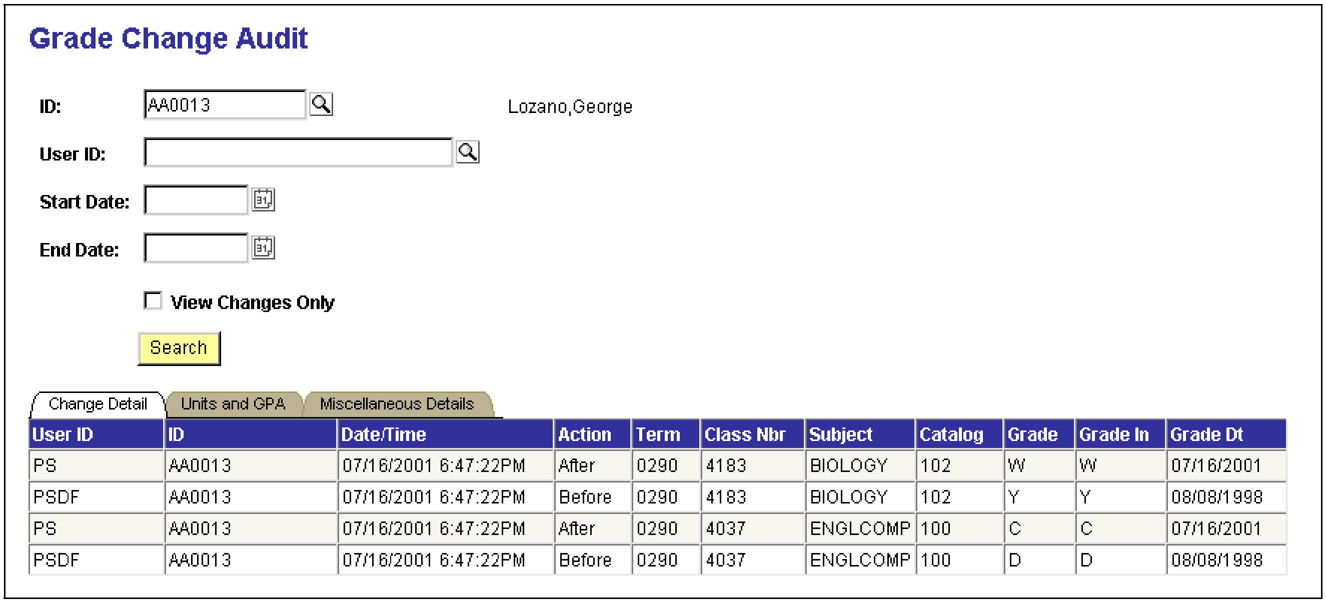
   Miscellaneous Details

Pages Used to Audit Grade Changes

Page Name	Object Name	Navigation	Usage
Grade Change Audit	GRADE_AUDIT	Manage Student Records, Manage Academic Records, Inquire, Grade Change Audit, Grade Change Audit	Specify grade change audit search parameters and review detailed information about grade changes that match the selection criteria.

Entering Grade Change Audit Search Parameters

Access the Grade Change Audit page.



Grade Change Audit

ID: AA0013 Lozano,George

User ID:

Start Date:

End Date:

View Changes Only

Search

Change Detail | Units and GPA | Miscellaneous Details

User ID	ID	Date/Time	Action	Term	Class Nbr	Subject	Catalog	Grade	Grade In	Grade Dt
PS	AA0013	07/16/2001 6:47:22PM	After	0290	4183	BIOLOGY	102	W	W	07/16/2001
PSDF	AA0013	07/16/2001 6:47:22PM	Before	0290	4183	BIOLOGY	102	Y	Y	08/08/1998
PS	AA0013	07/16/2001 6:47:22PM	After	0290	4037	ENGLCOMP	100	C	C	07/16/2001
PSDF	AA0013	07/16/2001 6:47:22PM	Before	0290	4037	ENGLCOMP	100	D	D	08/08/1998

Grade Change Audit page: Change Detail tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

ID The ID of the student to audit. Leave this field cleared to have the system retrieve all values for this field (wild card).

User ID The ID of the user to audit. Leave this field cleared to have the system retrieve all values for this field (wild card).

Start Date The earliest date to audit. Leave this field cleared to have the system retrieve all values for this field (wild card).

End Date The latest date to audit. Leave this field cleared to have the system retrieve all values for this field (wild card).

View Changes Only If you select this check box, the system returns only those records with an action of *After.* If you clear this check box, the system returns records with an action of *Before* and *After.*

Search Click to retrieve audit data. To refresh the data that the system returns, update the selection criteria and click the button again.

Note. Once you click the Search button, the retrieval process begins. If the system finds records in the GRADE_AUDIT table within your search criteria, the system refreshes the data on the Change Detail tab. If the process returns no changes, the fields on the Change Detail tab remain clear.

User ID The ID of the individual who made changes to the PS_STDNT_ENRL record.

ID The ID of the student whose grade changed.

Date/Time When a user made changes to the PS_STDNT_ENRL record.

Action

Action types reflect the state of the change record. Valid values are the following:

Before: Image of the record before it was updated.

After: Image of the record after it was updated.

All remaining columns on the Units and GPA tab and the Miscellaneous Detail tab display a subset of columns from the Grade Audit table, which stores a snapshot of the student's record on the PS_STDNT_ENRL table.

See Also

Chapter 24, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Enrollment Component, page 523

CHAPTER 34

Graduating Students

This chapter discusses how to:

- Post degrees.
- Automate graduation processing and reporting.
- Audit degree changes.
- Apply for graduation through self-service.

See Also

Chapter 12, "Setting Up Degrees and Honors," page 251

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Processing Academic Advising Reports"

Posting Degrees

The process of posting degrees requires that you update student program records and, if necessary, report and audit degree changes. This section provides an overview of the degree posting process, lists prerequisites, and discusses how to:

- Complete the student's program.
- Verify and update student degree data.
- View and modify degree data.
- View and modify degree honors data.
- View and modify degree plan data.
- View and modify degree subplan data.

Understanding the Degree-Posting Process

Here's how to post a degree:

1. Insert a new row and enter a program action of *Completion of Program* on the Student Program page.

   This sets the Degree Checkout Stat (degree checkout status) field on the Student Degrees page to *Approved.*
2. (Optional) On the Student Degrees page, verify the completion term, specify degree honors, and enter a degree grade point average (GPA.)
3. Click the Update Degrees button on the Student program page to post the degree.

This sets the Degree Checkout Stat field to *Awarded.*

4. (Optional) When the process completes, you can view and edit posted degrees through the Student Degrees component.
   a. View and modify degree honors information on the Degree Honors page.
   b. View and modify degree plan information on the Degree Plan page.
   c. View and modify subplan information on the Degree Sub-Plan page.
5. (Optional) Use the Degree Change Audit component to audit any degree status changes.

   See Chapter 34, "Graduating Students," Auditing Degree Changes, page 768.

Prerequisites

Before you can post a student's degree, you must:

- Define degrees and degree honors.
- Assign degrees to academic plans.
- Matriculate the student, or confirm that the student has a history of matriculation.

Pages Used to Post Degrees

Page Name	Object Name	Navigation	Usage
Student Program	STDNT_PROG	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Program	Insert a new row and update the Program Action field value to a status of *Completion of Program.*
Student Degrees	STDNT_DEGR	Manage Student Records, Track Student Careers, Use, Student Program/Plan, Student Degrees	Verify and update a student's completion term, degree honors, degree GPA, and degree checkout status.
Degree	ACAD_DEGREE	Manage Student Records, Track Student Careers, Use, Student Degrees, Degree	View and modify posted degree data.
Degree Honors	ACAD_DEGREE_HONORS	Manage Student Records, Track Student Careers, Use, Student Degrees, Degree Honors	View and modify degree honors information, which is particularly useful when you want to award more than two honors code values to a student (there is a limit of two honors codes on the Student Degrees page).
Degree Plan	ACAD_DEGREE_PLAN	Manage Student Records, Track Student Careers, Use, Student Degrees, Degree Plan	View and modify degree plan information.
Degree Sub-Plan	ACAD_DEGREE_SUBPLN	Manage Student Records, Track Student Careers, Use, Student Degrees, Degree Sub-Plan	View and modify subplan information.

Completing the Student's Program

Access the Student Program page.

Program Action Insert a new row in this field, and select a value of *Completion of Program.*

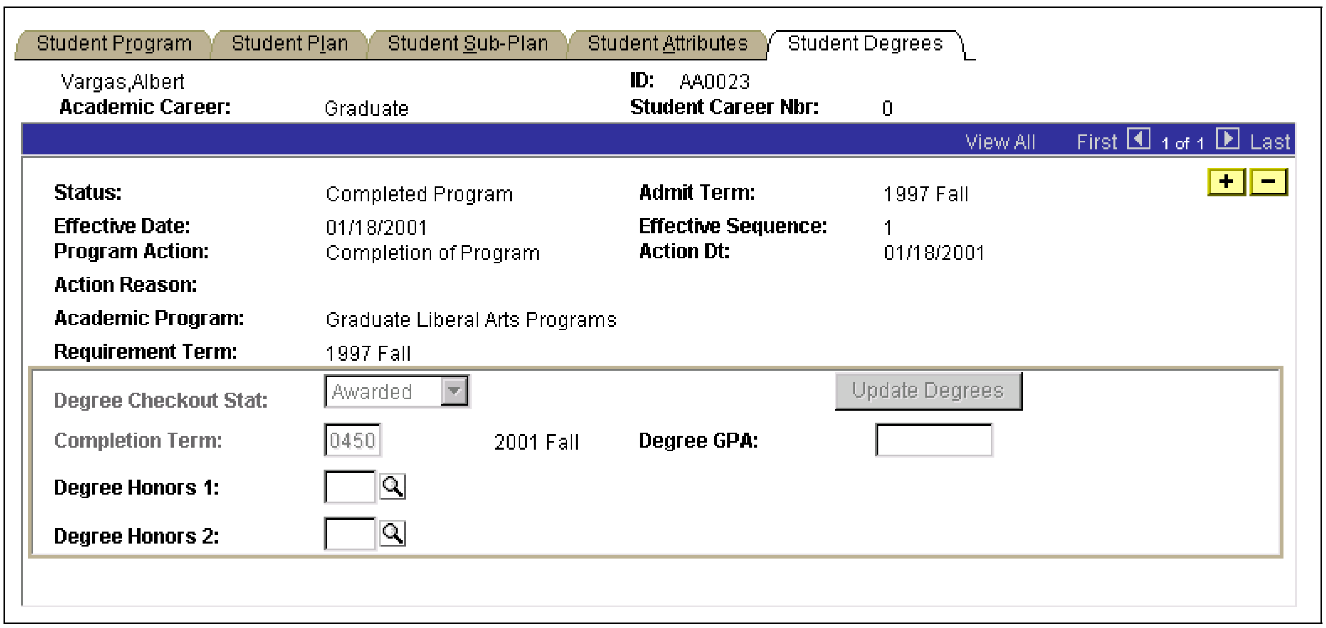
Note. If you must revoke a degree after it's been awarded, insert a row and enter a program action of *Revoke Degree.* The system automatically updates the degree tables.

See Also

Chapter 19, "Managing Students' Programs, Plans, and Subplans," Pages Used to Manage Students' Program Stacks, page 446

Verifying and Updating Student Degree Data

Access the Student Degrees page.



Student Degrees page

Degree Checkout Stat (degree checkout status) Throughout a student's degree history, you can progressively update the values in this field. Your choices are *Applied, Approved, Awarded, Denied, In review, Pending,* and *Withdrawn.*

When you select the status of *Completion of Program* in the Program Action field on the Student Program page, the system populates the Degree Checkout Stat field here to *Approved;* you cannot modify this value. The system changes this status from *Approved* to *Awarded* when you click the Update Degrees button. When you click this button, all fields on this page become unavailable. You must complete future edits on the Degree page, or you can revoke the degree altogether by inserting a new row in the Program Action field on the Student Program page and selecting a value of *Revoke Degree.*

Completion Term Enter the term in which the degree is awarded.

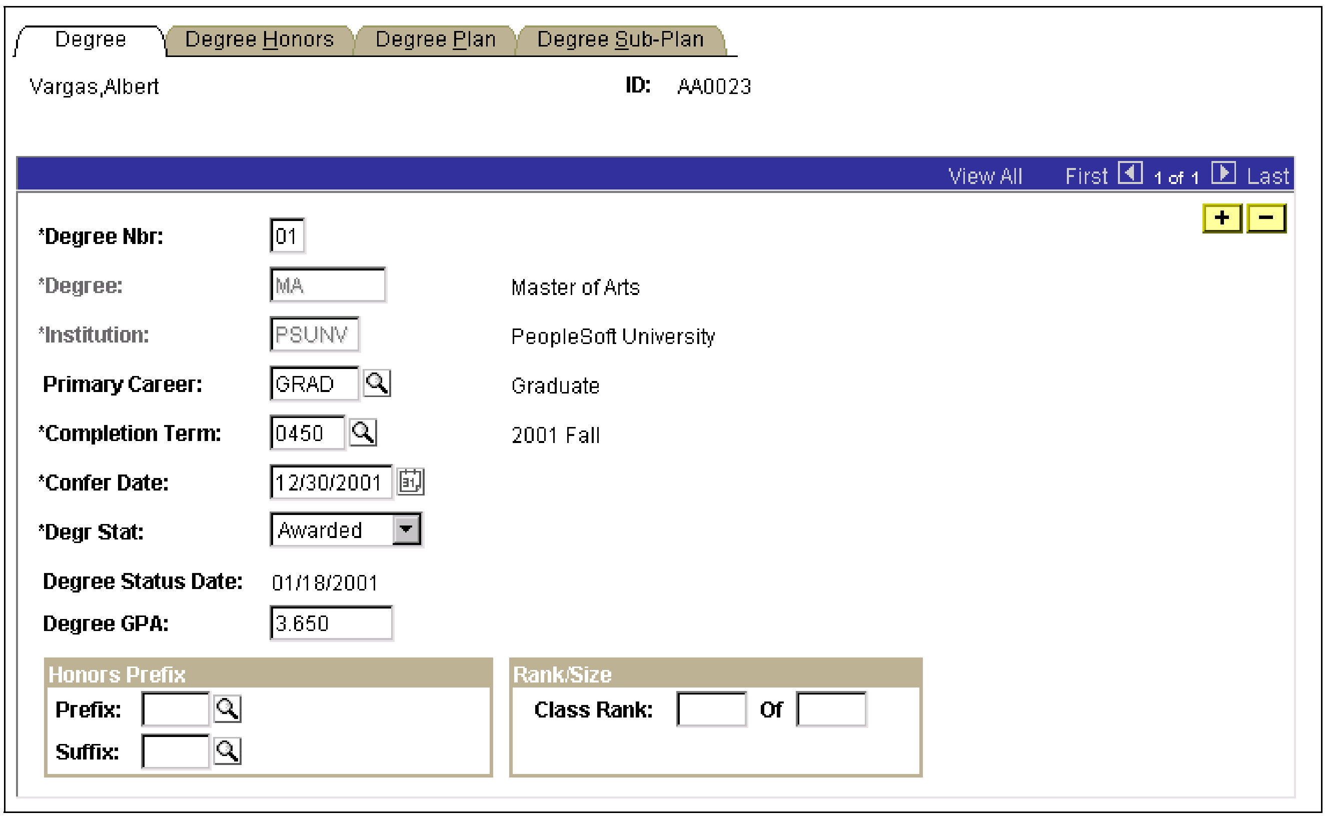
Degree Honors 1 and **Degree Honors 2** If applicable, select a value from the list of values that you defined on the Degree Honors Table page.

Degree GPA (degree grade point average) Enter the degree GPA. When you click the Update Degrees button, the GPA and degree honors are stored on the student's degree records.

Although the system does not calculate this value, you can create an academic advising report to assist you with calculating the value.

Viewing and Modifying Degree Data

Access the Degree page.



Degree page

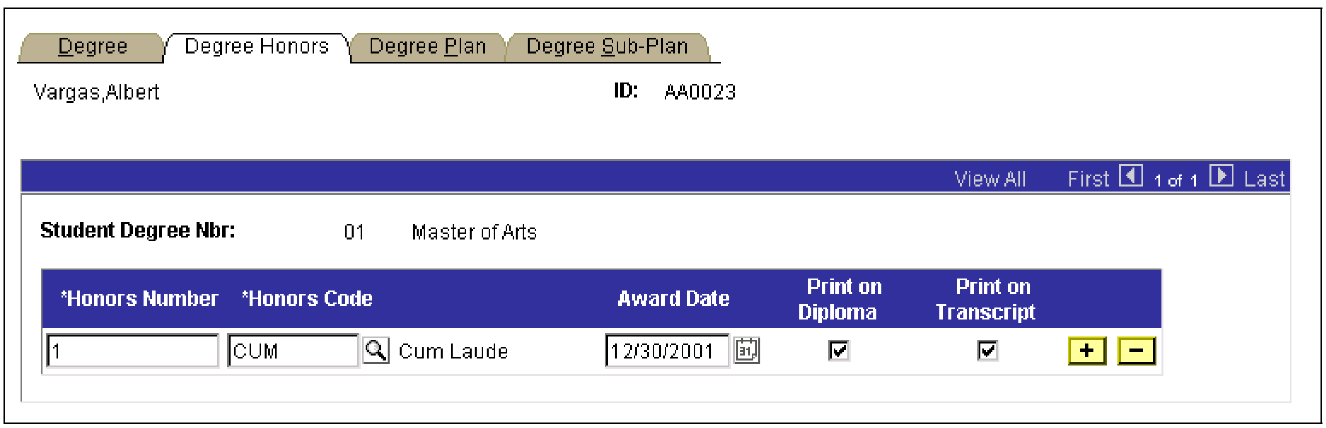
Degree Number The system generates the degree number, which is unique for each degree that you assign to a student.

Degree and **Institution** These values appear by default from the Student Degrees page. You cannot override these values once degree posting is complete. The degree appears on the transcript if you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.

Primary Career, Completion Term, Confer Date, Degr Stat (degree status), and **Degree GPA** (degree grade point average)	These values appear by default from the Student Degree page. The Confer Date defaults to the Confer Date for student's completion term. You can override the values.
Degree Status Date	This date appears by default from the effective date for the *Completion* row on the Student Program page.
Prefix and **Suffix**	Select from those prefixes and suffixes that you defined on the Degree Honors Table page. Only those honors with a type of *Degree Prefix* and *Degree Suffix,* respectively, are available. The prefix and suffix appears with the degree description on the transcript if you specify a *Local Degrees* print area on the Transcript Type- Degrees/Program page.
Class Rank and **Of**	Enter class rank values for the student's degree. The class rank information appears with the degree description on the transcript if you specify a *Local Degrees* print area and select the Print Degree Rank check box on the Transcript Type - Degrees/Program page.

Viewing and Modifying Degree Honors Data

Access the Degree Honors page.



Degree Honors page

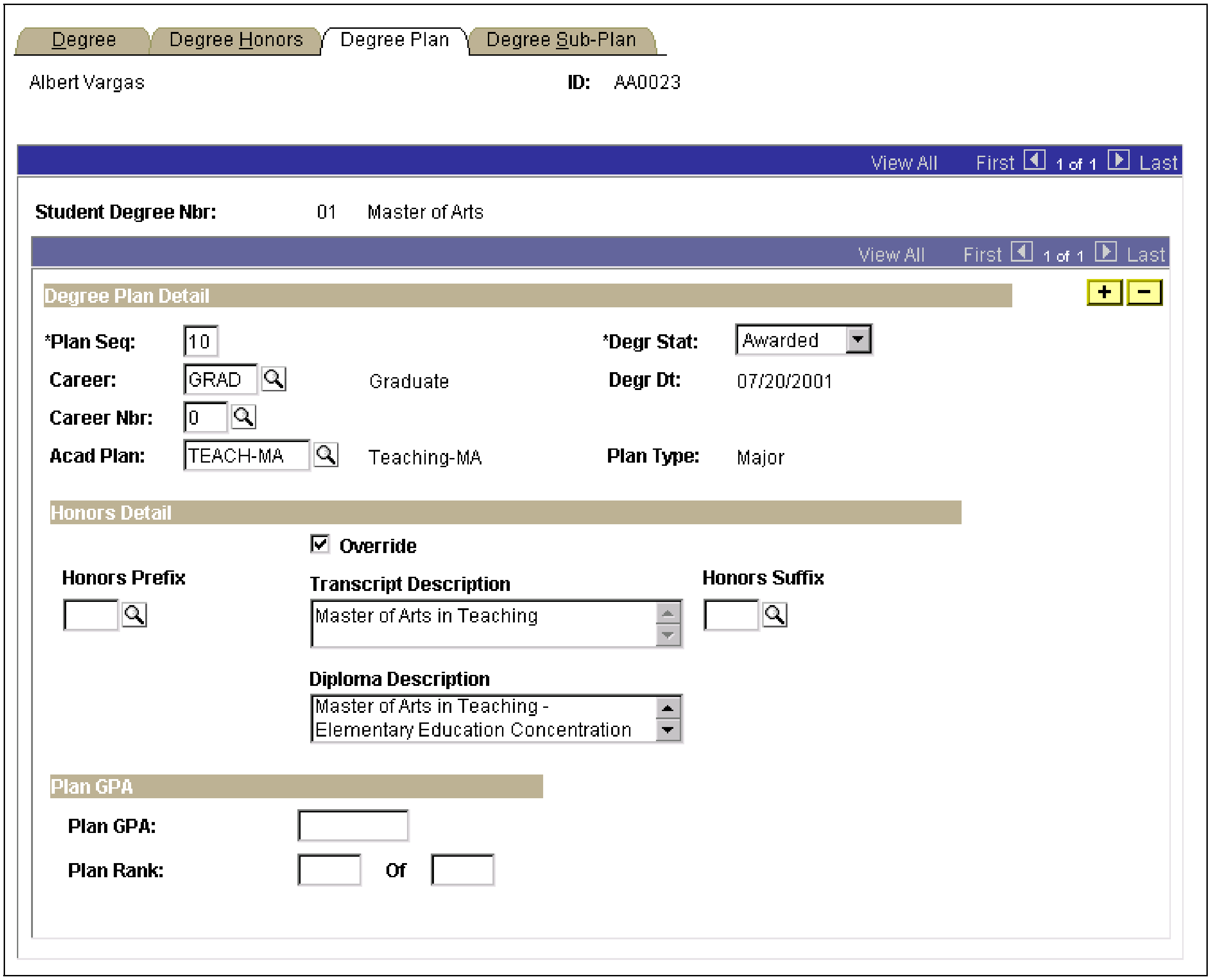
Honors Number	The system generates the honors number and uses this value for sequencing honors on the transcript.
Honors Code	If available, this value appears by default from the Student Degrees page. Add rows to select additional honors for the degree. Honors values are defined on the Degree Honors Table page.
Award Date	This value appears by default from the Confer Date field on the Degree page. See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Defining Traditional Academic Calendars," Setting Up Term Landmark Dates.
Print on Diploma	No programming is tied to this check box.

Print on Transcript Select this check box to display the honors value on the student's transcript. For the degree honors information to appear on the transcript, you must also specify a *Local Degrees* print area and select the Print Degree Honors check box on the Transcript Type- Degrees/Program page.

Warning! Changes to this page do not post to a student's record. You must post honors to the student's record by running the posting process using the Academic Standing/Honors and Awards page. When you run the process, select the Calculate Honors & Awards check box to calculate honors and awards.

Viewing and Modifying Degree Plan Data

Access the Degree Plan page.



Degree Plan page

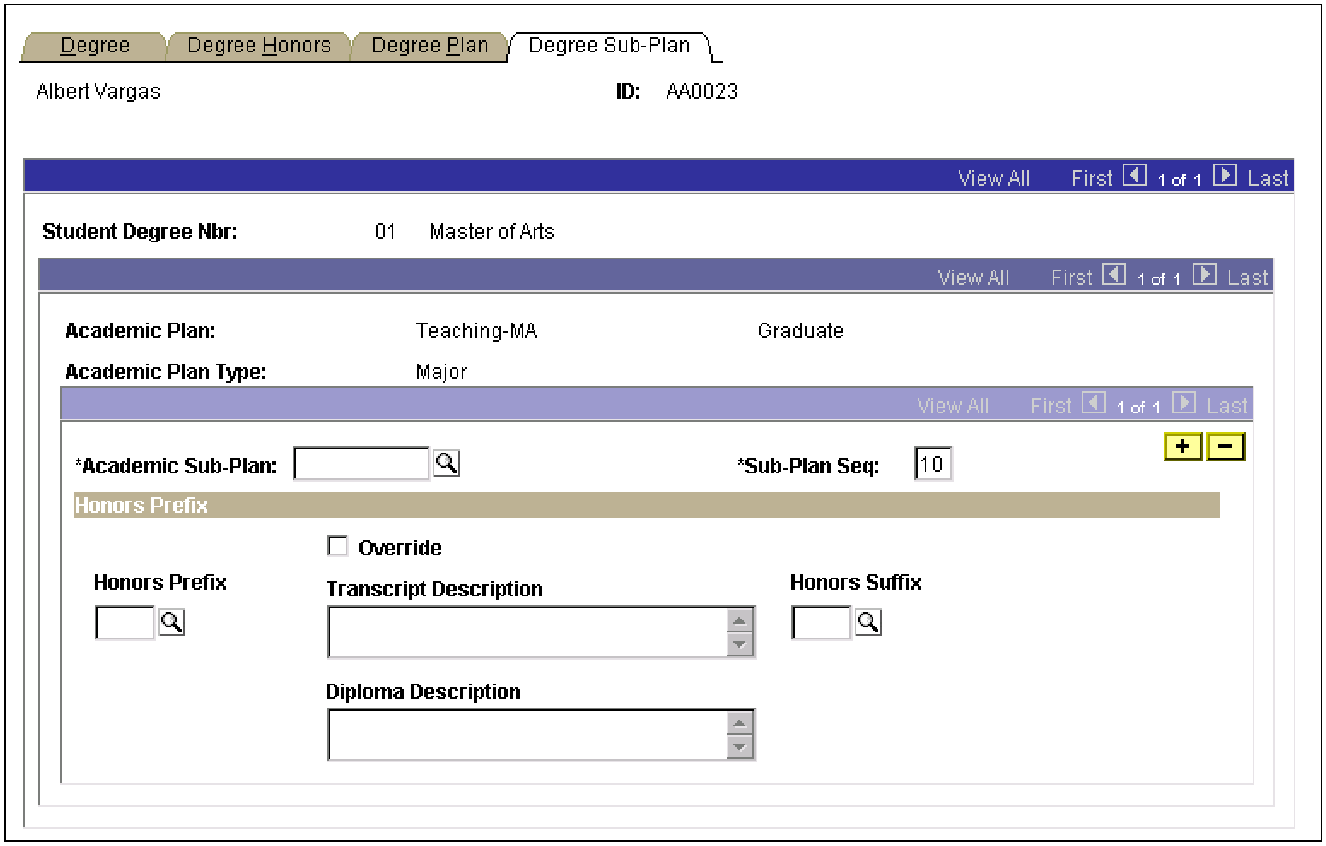
Plan Seq (plan sequence) This value defines the primacy of the plan within the program.

Career The career to which the degree is assigned.

Career Nbr (career number)	The specific career number to which the degree is assigned. The system increments this number for each active program in the same career.
Acad Plan (academic plan)	The academic plan to which the degree is assigned.
Degr Stat (degree status)	The status of the degree: *Awarded* and *Revoked*. You can override the degree status. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
Degr Dt (degree date)	The effective date from the Student Program page, where the program action is *Completion of Program.*
Plan Type	The type of plan, as defined on the Academic Plan Table page.
Override	Select this check box to revise the transcript description and the diploma description.
Transcript Description	The description of the plan degree to appear on the transcript. The plan transcript description appears on transcripts where you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.
Diploma Description	No programming is tied to this field.
Honors Prefix	Specify an honors prefix for this plan degree, if any. Honors prefix values are defined with a type of *Degree Plan Prefix* on the Degree Honors Table page. The plan honors prefix appears next to the plan degree on transcripts where you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.
Honors Suffix	Specify an honors suffix for this plan degree, if any. Honors suffix values are defined with a type of *Degree Plan Suffix* on the Degree Honors Table page. The plan honors suffix appears next to the plan degree on transcripts where you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.
Plan GPA (plan grade point average)	The system does not calculate the plan GPA value, although you can create an academic advising report to assist you with the calculation. The plan GPA appears with the plan degree on transcripts where you specify a *Local Degrees* print area and select the Print Degree Plan GPA check box on the Transcript Type - Degrees/Program page.
Plan Rank and **Of**	Enter plan rank values for the student's plan. The plan rank information appears with the plan degree description on the transcript if you specify a *Local Degrees* print area and select the Print Degree Plan Rank check box on the Transcript Type - Degrees/Program page.

Viewing and Modifying Degree Subplan Data

Access the Degree Sub-Plan page.



Degree Sub-Plan page

Academic Sub-Plan The academic subplan associated with the plan degree.

Sub-Plan Seq (subplan sequence) The sequence number for the subplan. This value defines the primacy of the subplan within the plan.

Override Select this check box to revise the transcript description and the diploma description.

Transcript Description The subplan transcript description appears on transcripts where you specify a *Local Degrees* print area and select the Print Degree Sub-Plan check box on the Transcript Type - Degrees/Program page.

Diploma Description No programming is tied to this field.

Honors Prefix Specify an honors prefix for this subplan degree, if any. Honors prefix values are defined with a type of *Degree Sub-Plan Prefix* on the Degree Honors Table page. The subplan honors prefix appears next to the subplan degree on transcripts where you specify a *Local Degrees* print area and select the Print Sub-Plan check box on the Transcript Type - Degrees/Program page.

Honors Suffix Specify an honors prefix for this subplan degree, if any. Honors suffix values are defined with a type of *Degree Sub-Plan Suffix* on the Degree Honors Table page. The subplan honors suffix appears next to the subplan degree on transcripts where you specify a *Local Degrees* print area and select the Print Sub-Plan check box on the Transcript Type - Degrees/Program page.

Automating Graduation Processing and Reporting

The Graduation Processing and Reporting feature, which is run through the Graduation Reporting component, facilitates the degree checkout process. The feature works as a part of core functionality, and it works as an integrated complement to the PeopleSoft Learner Services collaborative application (through which students can use self-service pages to apply for graduation).

Using the Graduation Processing and Reporting feature, you can dynamically define a student population, and for this population you can:

- Update degree checkout status values (from a valid status that you specify to another status that you specify).
- Create requests for transcripts, degree audits, and special advisement reports.
- Generate a graduation report.

This section provides an overview of the graduation reporting process, lists prerequisites, and discusses how to:

- Enter graduation report parameters.
- Retrieve student population.

Understanding the Graduation Reporting Process

Here's how to run the graduation reporting process:

1. Select the Select Students check box, and enter your student population selection criteria on the Graduation Reporting page.
2. Click the Run button to run the Graduation Reporting process.
3. Click the Fetch button on the Selection results page in order to populate the page with your resultant student population.
4. Delete rows remove students that you do not want to process. Insert rows to add students that did not match your parameters, but whom you want to process.
5. Navigate to the Graduation Reporting page and clear the Student Population check box.
6. Select the run option check boxes and their respective data.
7. Click the Run button and run the Graduation Reporting process.

   If you run a report, PeopleSoft suggests a type of *Web* and a format of *PDF.*
8. After the process completes, you can do the following:
   a. Navigate to the Transcript Generation page to generate transcripts (use the transcript request number on the Graduation Reporting page.)
   b. Navigate to the Student Degrees page or the Degrees page to view updated degree checkout status values.
   c. Review the Graduation report.

Prerequisites

If you plan to create transcript requests, you must first define transcript types in the Transcript Type component.

See Also

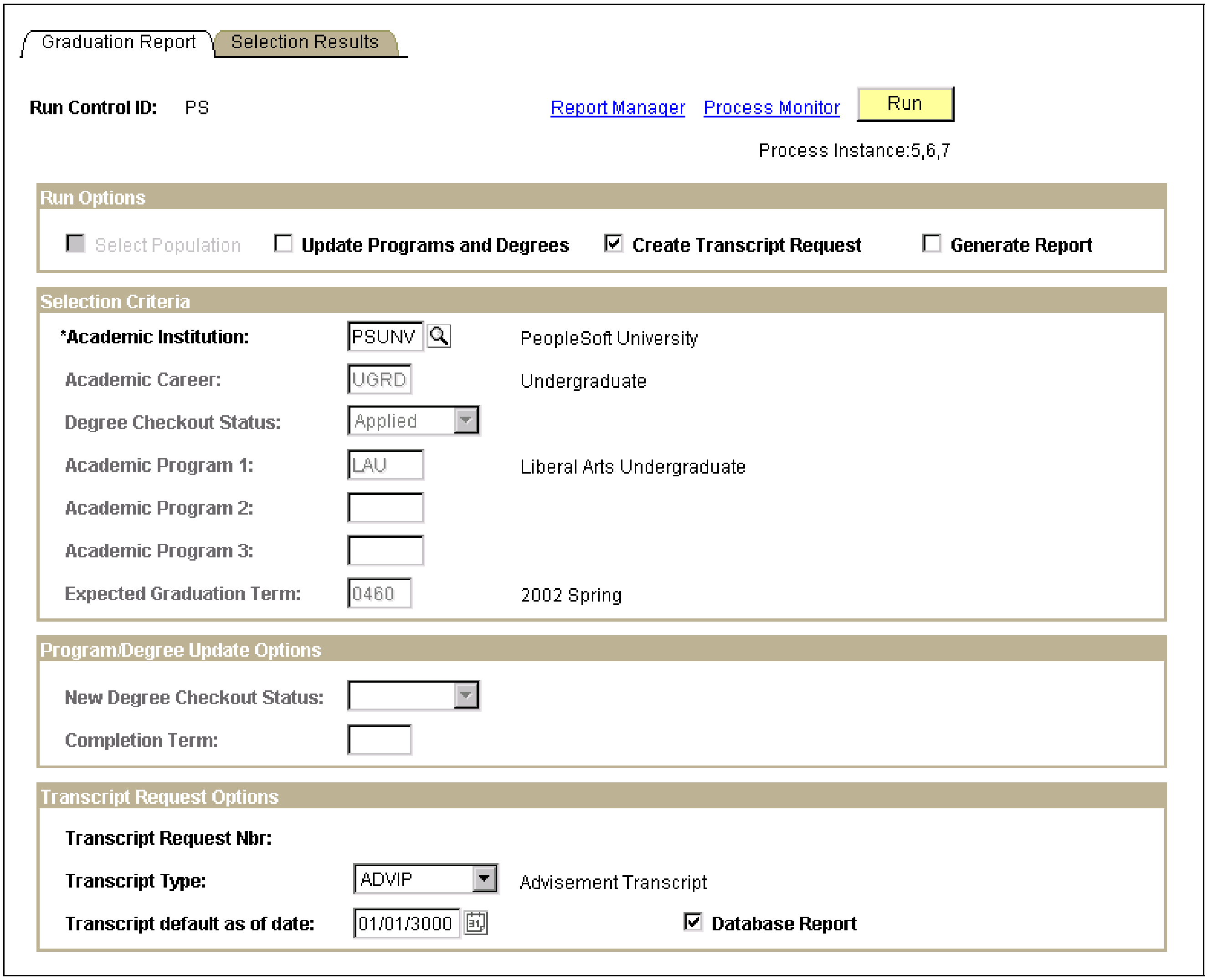
Chapter 13, “Setting Up Transcripts,” Defining Transcript Types, page 264

Pages Used to Automate Graduation Processing and Reporting

Page Name	Object Name	Navigation	Usage
Graduation Report	RUNCTL_GRAD_RPT	Manage Student Records, Manage Academic Records, Report, Graduation Reporting, Graduation Report	Enter graduation report parameters: define a population of students for which you can update degree checkout status values, create transcript requests, and generate graduation reports. For example, when a student applies for graduation through the PeopleSoft Learner Services Apply for Graduation feature, a separately licensed collaborative application, the system sets that student’s degree checkout status to *Applied*. You can use the Graduation Reporting component to set all students with a status of *Applied* to *In Review.*
Selection Results	RUNCTL_GRAD_RPT2	Manage Student Records, Manage Academic Records, Report, Graduation Reporting, Selection Results	Retrieve the results of your population query, add or delete students, and edit the degree GPA and degree honors for each student.

Entering Graduation Report Parameters

Access the Graduation Report page.



Graduation Report page

Run Options

Select Population

The first step to using the Graduation Reporting component is entering selection criteria and fetching a student population. Select this check box to enable the fields that define your student population in the Selection Criteria group box. After you enter all of your parameters, click the Run button to run the Graduation Reporting process. View your student population on the Selection Results page, where you can add or delete students

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Note. The process does not select students with a current program action of Admission Revocation, Defer Enrollment, Discontinuation, Suspension, or Administrative Withdrawal.

Update Programs and **Degrees**

Once you enter your selection criteria and fetch your population, select this check box to enable the fields in the Program/Degrees Update Options group box and enter your update data.

Once you specify your update data, click the Run button to run the Graduation Reporting process to update program and degree information for the students in your population. Specifically, this process updates for all students in your population the student career term records with the values from:

- The Program and Degree Update Options group box on this page.
- The Degree GPA and Degree Honors fields on the Selection Results page.

Create Transcript Request Once you enter your selection criteria and fetch your population, select this check box to enable the fields in the Transcript Request Options group box and to enter your transcript type data. Once you specify your data, run the Graduation Reporting process to create a batch transcript request for the students in your population. Next, generate the transcripts on the Transcript Generation page.

Generate Report Once you enter your selection criteria and fetch your population, select this check box and run the process to create a report that highlights all of the graduation data for the students in your population.

Selection Criteria

Academic Institution The academic institution of the students you want to fetch.

Academic Career The academic career of the students you want to fetch.

Degree Checkout Status The current degree checkout status of the students to fetch: *Applied, Approved, Denied, In Review, Pending,* or *Withdrawn.*

Academic Program 1, Academic Program 2, and **Academic Program 3** You can enter up to three academic programs within the career you specify to identify the students you want to fetch. If any fields are left blank, the system fetches all students in the career you specify.

Expected Graduation Term The expected graduation term of the students to fetch. The system verifies this value against the value in the Expected Grad Term field on the Student Program page. This field is optional.

Program and Degree Update Options

New Degree Checkout Status When you select the Update Programs and Degrees check box, the New Degree Checkout Status field becomes available.

Specify the degree checkout status that you want to assign to all students in your population: *Approved, Awarded, Denied, In review, Pending,* or *Withdrawn.* For a new checkout status of *Awarded,* the system inserts a new effective-dated row on the Student Program page with a program action of *Completion of Program.* For all other checkout status values, the system inserts a new effective-dated row on the Student Program page with a program action of *Data Change.* The system does not specify a program action reason.

Completion Term When you select a New Degree Checkout Status field value of *Awarded,* you must specify the completion term that you want the system to assign to students in your population.

Transcript Request Options

Elements in this group box are available when you select the Create Transcript Request check box.

Transcript Request Nbr (transcript request number) — The system generates and displays the number of your transcript request after you specify your transcript options and run the Graduation Reporting process. Use this number to generate transcripts on the Transcript Generation page.

Transcript Type — Specify the type of transcript to create for all students in your population.

Transcript default as of date — When you select a transcript type that is also an advising report (special or standard), this field becomes available.

A value appears by default from the Transcript Default Date on the Installation Student Administration page. You can override it.

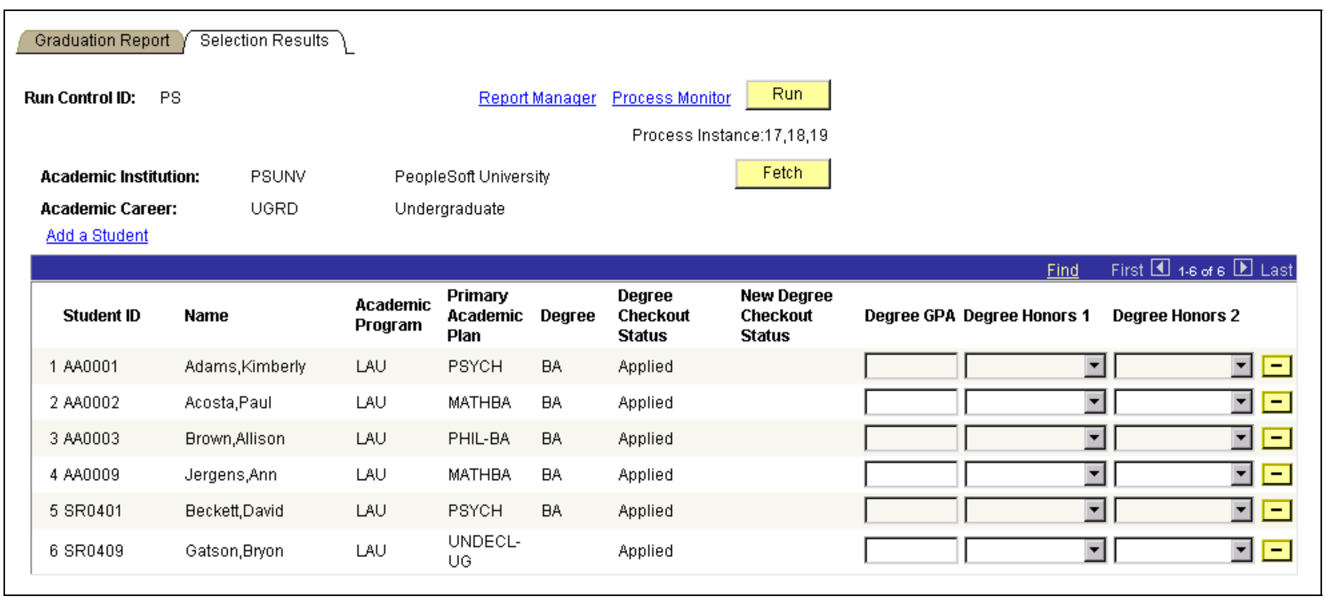
Database Report — When you select a transcript type that is also an advising report (special or standard), this check box becomes available. Select this check box to create a transcript request where the results of the advising report populate the analysis database tables.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, “Using the Analysis Database to Create User Configurable Reports,” Understanding the Analysis Database

Retrieving the Student Population

Access the Selection Results page.



Selection Results page

Fetch — Click to populate the page with your student population. If no students appear, either no students match your selection criteria, or you did not run the Graduation Reporting process.

Add a Student	Click to access the Add Student page where you can search for other student IDs within the career that you have specified. Only students that are active in their program are available.
Student ID	The ID of the student in the population.
Name	The name of the student in the population.
Academic Program	The academic program of the student in the population. If a student is active in more than one program in the career you specify, the selection returns all instances. You can delete program instances as necessary.
Primary Academic Plan	The primary academic plan of the student.
Degree	The degree that is associated with the program and primary plan of the student.
Degree Checkout Status	The student's degree checkout status prior to the update degree checkout status process. The system reads this value from the Student Degrees page.
New Degree Checkout Status	The student's degree checkout status of the student after the update degree checkout status process. The system reads this value from the Student Degrees page.
Degree GPA (degree grade point average)	Enter a degree GPA on one of three pages: the Selection Results page (prior to program completion/degree checkout status of *Awarded),* the Student Degrees page (prior to program completion or degree checkout status of *Awarded),* or the Degrees page (after program completion).
Degree Honors 1 and **Degree Honors 2**	The student's degree honors for this degree. The values appears from the Student Degrees page. Enter degree honors on one of three pages: the Selection Results page (prior to program completion/degree checkout status of *Awarded),* the Student Degrees page (prior to program completion/degree checkout status of *Awarded),* or the Degrees page (after program completion).

Auditing Degree Changes

This section provides an overview of degree change audits, lists prerequisites, and discusses how to:

- Enter degree change audit search parameters.
- View degree change audit results.
- View degree honors change audit results.
- View degree plan change audit results.
- View degree subplan change audit results.

Understanding Degree Change Audits

Degrees are among the most sensitive data within the Student Records application. As such, PeopleSoft offers Degree Change Audit functionality that captures and displays detailed information about student degree postings or changes to postings. Changes include online changes to the Student Degrees page that occur when you click the Update Degrees button on the Student Degrees page and changes to any of the pages in the Student Degrees component. Inserts, updates, or deletions on these pages cause the system to write an audit record to the degree change audit table. The degree change audit table captures the entire record for ACAD_DEGR, ACAD_DEGR_HONS, ACAD_DEGR_PLAN, and ACAD_DEGR_SPLN, storing an image of each record before and after any change. The system date/time stamps and marks each record in the audit table as an “insert” or “delete,” or as a “before” or “after” in the case of updates.

Use the Degree Change Audit component to search your database for details about degree changes. An option on the Search Criteria page enables you to filter out the “before” image.

Prerequisites

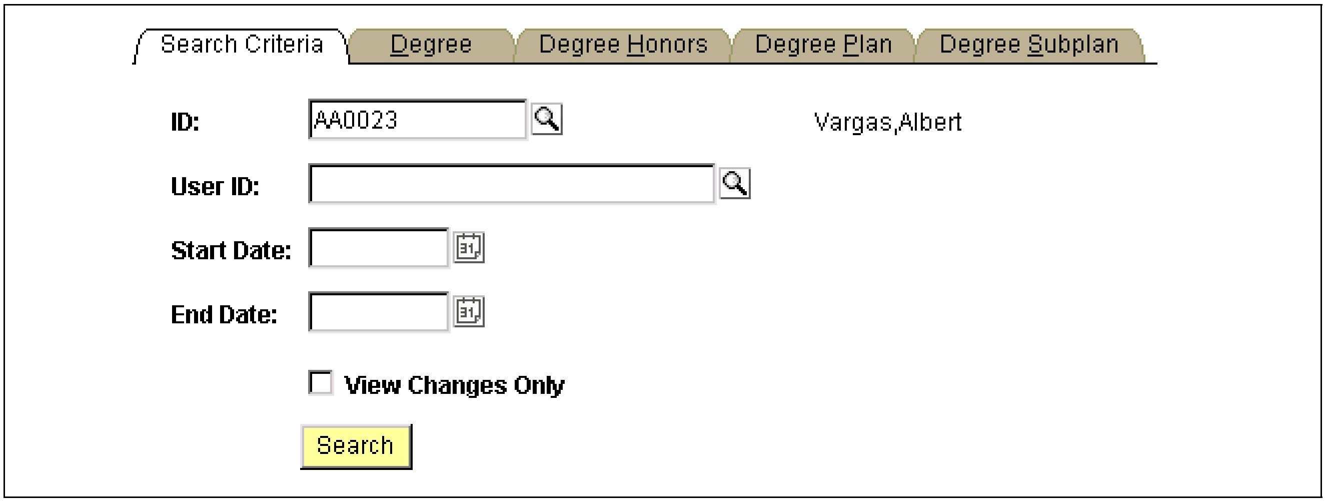
To view degree changes, you must first click the Search button on the Search Criteria page.

Pages Used to Audit Degree Changes

Page Name	Object Name	Navigation	Usage
Search Criteria	DEGREE_AUDIT	Manage Student Records, Track Student Careers, Inquire, Degree Change Audit, Search Criteria	Define your degree change audit search parameters. All of the fields on this page are optional.
Degree	AUD_ACAD_DEGR	Manage Student Records, Track Student Careers, Inquire, Degree Change Audit, Degree	Review detailed information about degree changes that match the selection criteria specified on the Search Criteria page. The elements on this page are the same as those found on the Degree page. See Chapter 34, "Graduating Students," Viewing and Modifying Degree Data, page 758.
Degree Honors	AUD_ACAD_DEGR_H	Manage Student Records, Track Student Careers, Inquire, Degree Change Audit, Degree Honors	Review detailed information about changes to degree honors that match the selection criteria specified on the Search Criteria page.
Degree Plan	AUD_ACAD_DEGR_P	Manage Student Records, Track Student Careers, Inquire, Degree Change Audit, Degree Plan	Review detailed information about degree plan changes that match the selection criteria specified on the Search Criteria page.
Degree Subplan	AUD_ACAD_DEGR_S	Manage Student Records, Track Student Careers, Inquire, Degree Change Audit, Degree Subplan	Review detailed information about degree subplan changes that match the selection criteria specified on the Search Criteria page. The elements of all four tabs on this page are the same as those found on the Degree Sub-Plan page. See Chapter 34, "Graduating Students," Viewing and Modifying Degree Subplan Data, page 761.

Entering Degree Change Audit Search Parameters

Access the Search Criteria page.



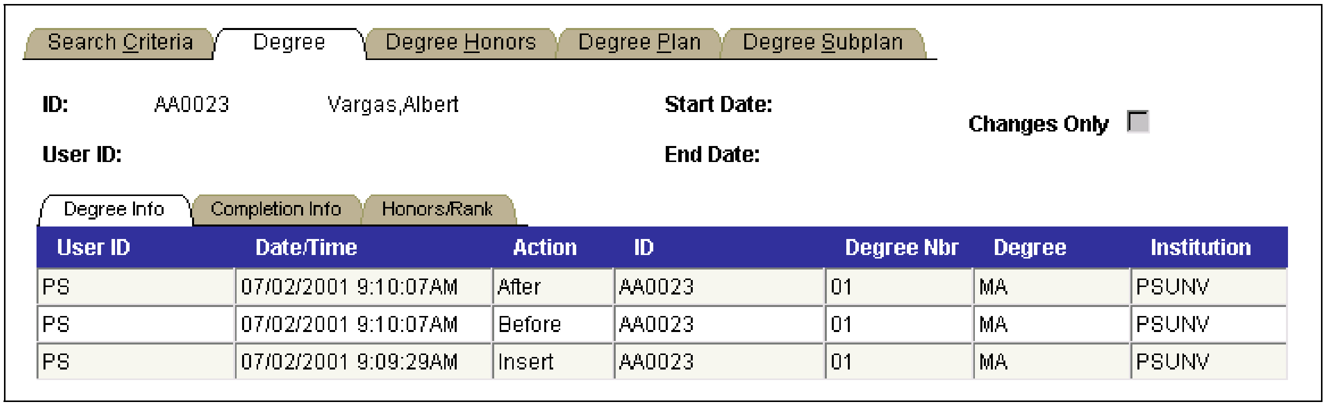
Search Criteria page

ID	The ID for the student who you want to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
User ID	The ID for the user who you want to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
Start Date	The earliest date to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
End Date	The latest date to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
View Changes Only	If cleared, the system returns all records with an action of *Insert, Before, After,* or *Delete.* If selected, the system does not return records with an action of *Before* and returns only records with an action of *Insert, After,* or *Delete.*
Search	Once you have entered your search parameters, click this button to return audit data to the Degree page. To change the data that the system returns, update the selection criteria and search for data again.

Note. When you click the Search button, the retrieval process begins. If the system finds changes to any of the records within your search criteria, the system automatically takes you to the first page where changes exist. If no changes are found, the system remains on the Search Criteria page.

Viewing Degree Change Audit Results

Access the Degree page.



Degree page: Degree Info tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

User ID The ID of the individual who made changes to the ACAD_DEGR record. For rows where the Action is *Delete,* no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string “********” appears in the User ID field.

Date/Time When changes to the ACAD_DEGR record were made.

Action Action types include the following:

Insert: User inserted a new row (a row was added to the database).

Delete: User deleted a row out of the database. For rows where the Action is *Delete,* no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string “********” appears in the User ID field.

Before: Image of the record before it was updated.

After: Image of the record after it was updated.

ID The ID of the student whose degree was changed.

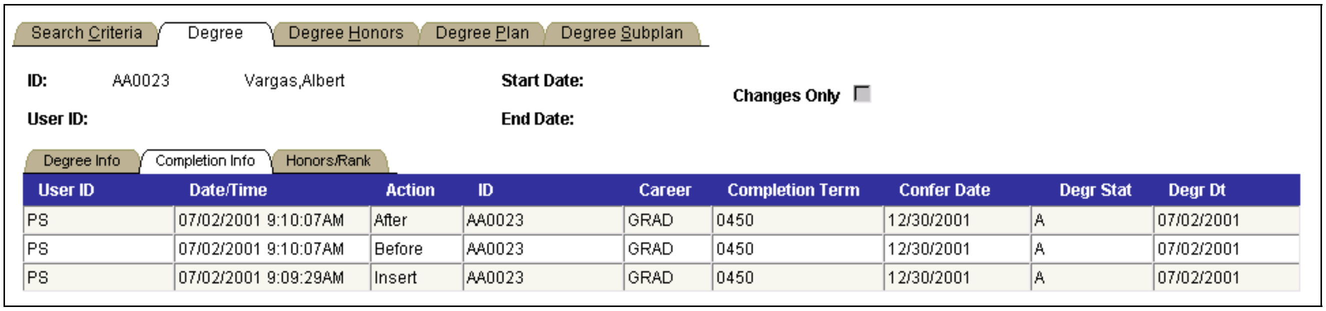
Degree Nbr (degree number) Students can have more than one degree, and each degree is assigned a degree number.

Degree The student’s degree.

Institution The academic institution associated with the degree.

Completion Info Tab

Select the Completion Info tab.



Search Criteria | Degree | Degree Honors | Degree Plan | Degree Subplan

ID: AA0023 Vargas,Albert Start Date: Changes Only

User ID: End Date:

Degree Info | Completion Info | Honors/Rank

User ID	Date/Time	Action	ID	Career	Completion Term	Confer Date	Degr Stat	Degr Dt
PS	07/02/2001 9:10:07AM	After	AA0023	GRAD	0450	12/30/2001	A	07/02/2001
PS	07/02/2001 9:10:07AM	Before	AA0023	GRAD	0450	12/30/2001	A	07/02/2001
PS	07/02/2001 9:09:29AM	Insert	AA0023	GRAD	0450	12/30/2001	A	07/02/2001

Degree page: Completion Info tab

Career The career under which the student earns the degree.

Completion Term The completion term of the degree.

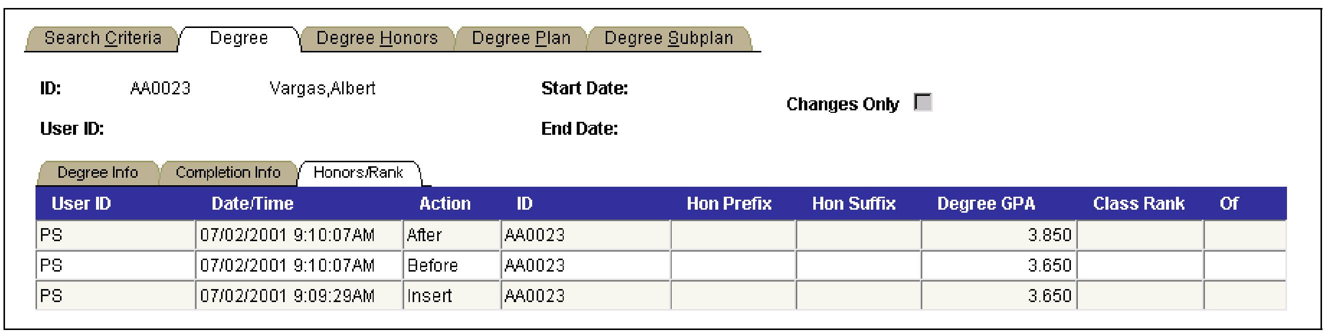
Confer Date The date the degree was conferred. This is the date when the degree is official.

Degr Stat (degree status) The status of the degree. Choices are *A* (active) and *R* (revoked).

Degr Dt (degree date) The date the degree is updated to a status of awarded or revoked. This date may differ from the actual confer date.

Honors/Rank Tab

Select the Honors/Rank tab.



Search Criteria | Degree | Degree Honors | Degree Plan | Degree Subplan

ID: AA0023 Vargas,Albert Start Date: Changes Only

User ID: End Date:

Degree Info | Completion Info | Honors/Rank

User ID	Date/Time	Action	ID	Hon Prefix	Hon Suffix	Degree GPA	Class Rank	Of
PS	07/02/2001 9:10:07AM	After	AA0023			3.850		
PS	07/02/2001 9:10:07AM	Before	AA0023			3.650		
PS	07/02/2001 9:09:29AM	Insert	AA0023			3.650		

Degree page: Honors/Rank tab

Hon Prefix (honors prefix) The degree honors prefix for the degree.

Hon Suffix (honors suffix) The degree honors suffix for the degree.

Degree GPA (degree grade point average) The degree grade point average.

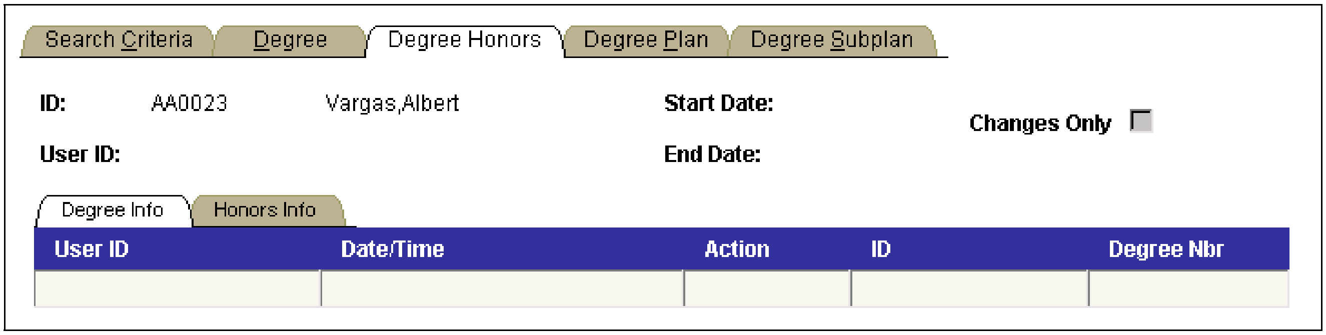
Class Rank Of The student's class rank and class size.

See Also

Chapter 34, "Graduating Students," Verifying and Updating Student Degree Data, page 757

Viewing Degree Honors Change Audit Results

Access the Degree Honors page.



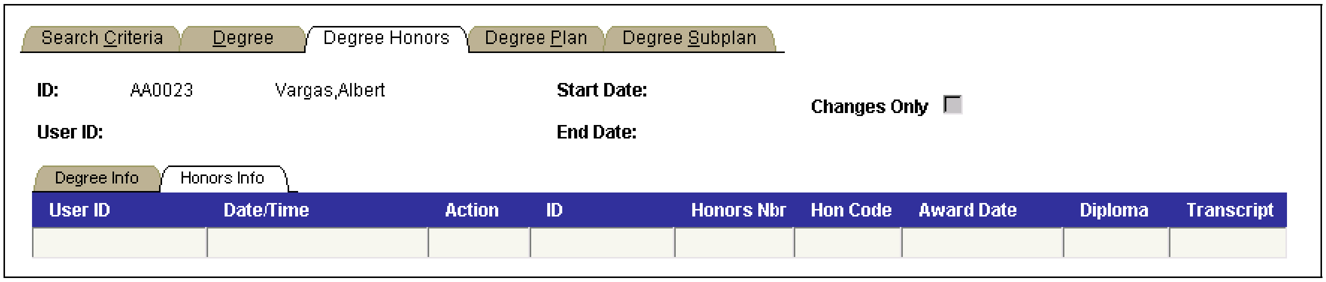
Degree Honors page: Degree Info tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

User ID	The ID of the individual who made changes to the ACAD_DEGR_HONS record. For rows where the action is *Delete,* no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field.
Date/Time	When changes to the ACAD_DEGR_HONS record were made.
Action	Action types include the following: *Insert:* User inserted a new row (a row was added to the database). *Delete:* User deleted a row out of the database. For rows where the Action is *Delete,* no User ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the User ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field. *Before:* Image of the record before it was updated. *After:* Image of the record after it was updated.
ID	The ID of the student whose degree was changed.
Degree Nbr (degree number)	Students can have more than one degree, and each degree is assigned a degree number.

Honors Info Tab

Select the Honors Info tab.



Degree Honors page: Honors Info tab

Honors Nbr (honors number) — Students can have multiple honors for each degree. Each honors value has a unique number.

Hon Code (honors code) — The honors code associated with the degree.

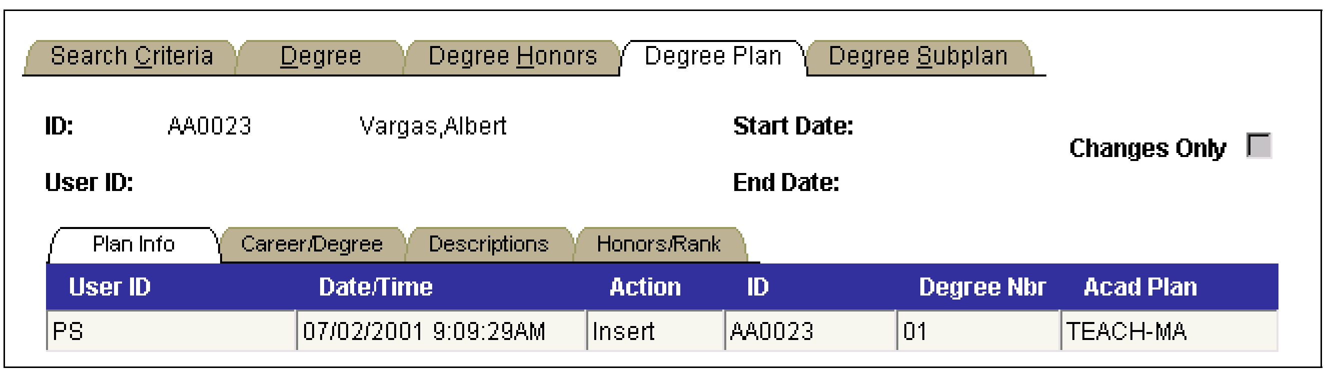
Award Date — The date the honor was awarded.

Diploma — The setting of the Print on Diploma check box on the Degree Honors page. The check box status values are *Y* for selected, and *N* for cleared.

Transcript — The setting of the Print on Transcript check box on the Degree Honors page. The check box status values are *Y* for selected, and *N* for cleared.

Viewing Degree Plan Change Audit Results

Access the Degree Plan page.



Degree Plan page: Plan Info tab

User ID — The User ID of the individual who made changes to the ACAD_DEGR_PLAN record. For rows where the Action is *Delete,* no User ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the User ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field.

Date/Time — When changes to the ACAD_DEGR_PLAN record were made.

Action — Action types include the following:

Insert: User inserted a new row (a row was added to the database).

Delete: User deleted a row out of the database. For rows where the Action is *Delete,* no User ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the User ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field.

Before: Image of the record before it was updated.

After: Image of the record after it was updated.

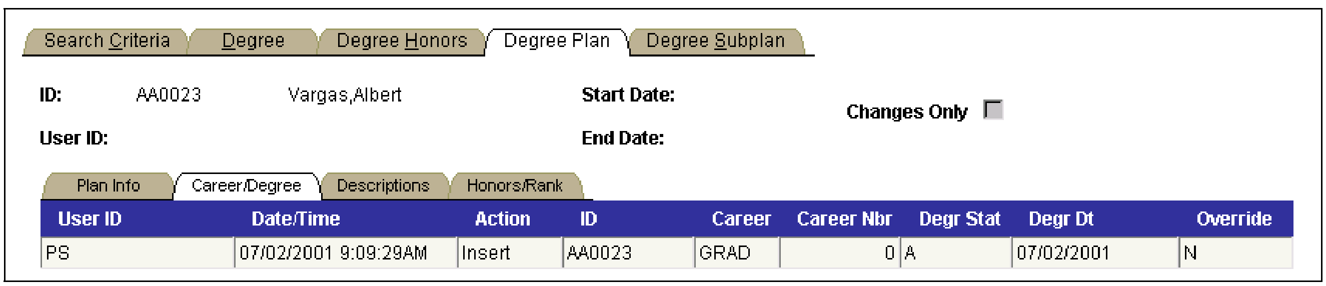
ID The ID of the student whose degree was changed.

Degree Nbr (degree number) Students can have more than one degree, and each degree is assigned a degree number.

Acad Plan (academic plan) All plans associated with the degree.

Career/Degree Tab

Select the Career/Degree tab.


Search Criteria | Degree | Degree Honors | Degree Plan | Degree Subplan

ID: AA0023 Vargas,Albert Start Date:

User ID: End Date: Changes Only

Plan Info | Career/Degree | Descriptions | Honors/Rank

User ID	Date/Time	Action	ID	Career	Career Nbr	Degr Stat	Degr Dt	Override
PS	07/02/2001 9:09:29AM	Insert	AA0023	GRAD	0	A	07/02/2001	N

Degree Plan: Career/Degree tab

Career The career under which the student earns the degree.

Career Nbr (career number) The number of the career associated with the degree. For students with more than one program in a single career, this number increments from zero.

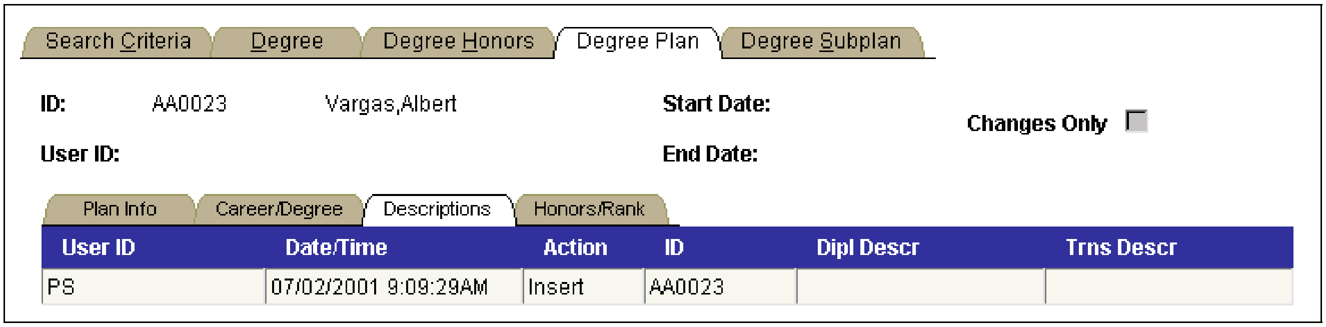
Degr Stat (degree status) The status of the degree. Choices are *A* (active) and *R* (revoked).

Degr Dt (degree date) The date the degree is updated to a status of awarded or revoked. This date may differ from the actual confer date.

Override This represents the setting of the Override check box on the Degree Plan page.

Descriptions Tab

Select the Descriptions tab.



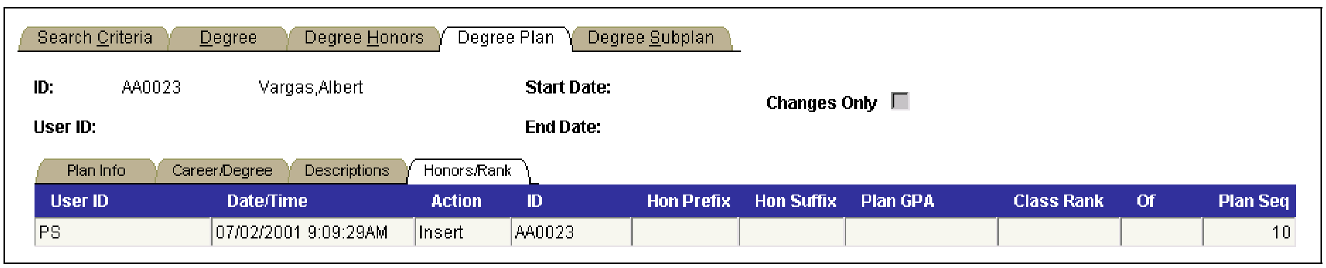
Degree Plan: Descriptions tab

Dipl Descr (diploma description) The academic plan diploma description, if different from the default.

Trns Descr (transcript description) The academic plan transcript description, if different from the default.

Honors/Rank Tab

Select the Honors/Rank tab.



Degree Plan: Honors/Rank tab

Hon Prefix (honors prefix) The degree honors prefix for the plan.

Hon Suffix (honors suffix) The degree honors suffix for the plan.

Degree GPA (degree grade point average) The plan grade point average.

Class Rank Of The student’s class rank and class size.

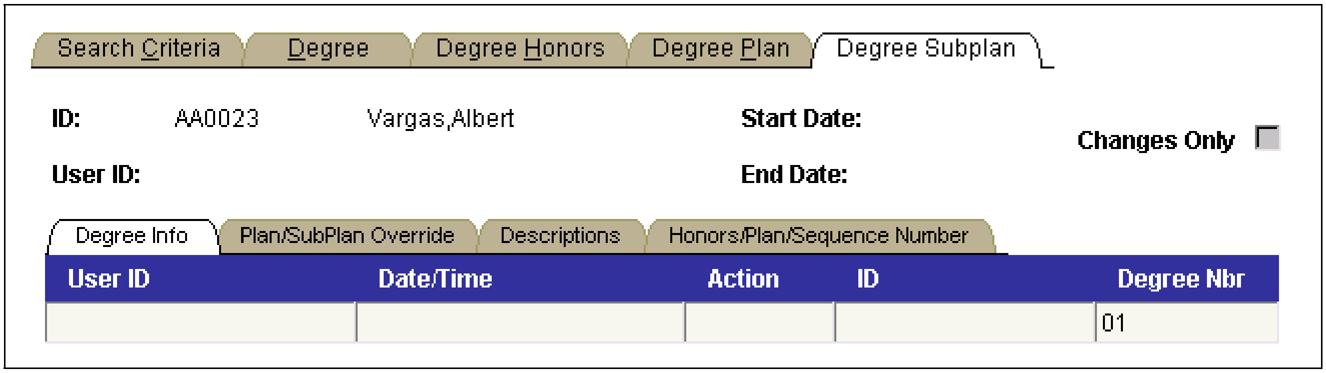
Plan Seq (plan sequence) The number of the plan within the program.

See Also

Chapter 34, “Graduating Students,” Viewing and Modifying Degree Plan Data, page 760

Viewing Degree Subplan Change Audit Results

Access the Degree Subplan page.



Degree Subplan page: Degree Info tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

User ID The User ID of the individual who made changes to the ACAD_DEGR_SPLN record. For rows where the Action is *Delete,* no User ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the User ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field.

Date/Time When changes to the ACAD_DEGR_SPLN record were made.

Action Action types include the following:

Insert: User inserted a new row (a row was added to the database).

Delete: User deleted a row out of the database. For rows where the Action is *Delete,* no User ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the User ID of the person who deleted it. When deletes occur, the character string "********" appears in the User ID field.

Before: Image of the record before it was updated.

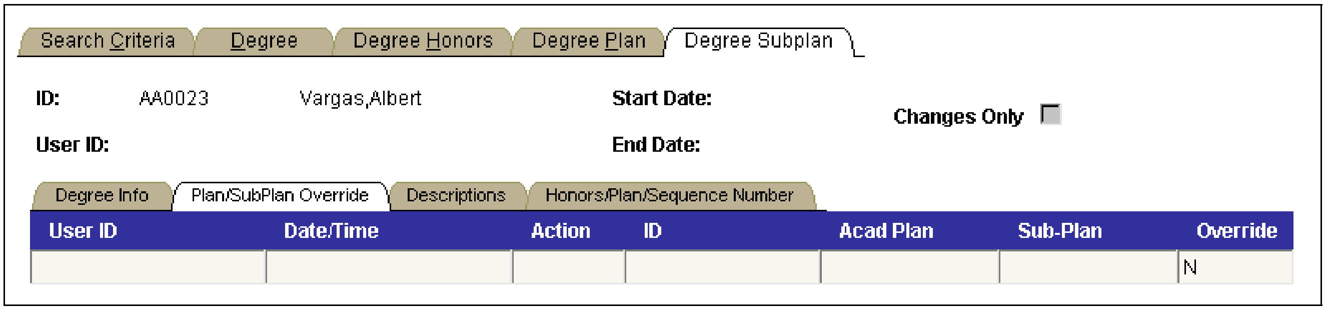
After: Image of the record after it was updated.

ID The ID of the student whose degree was changed.

Degree Nbr (degree number) Students can have more than one degree, and each degree is assigned a degree number.

Plan/SubPlan Override Tab

Select the Plan/SubPlan Override tab.



Degree Subplan page: Plan/SubPlan Override tab

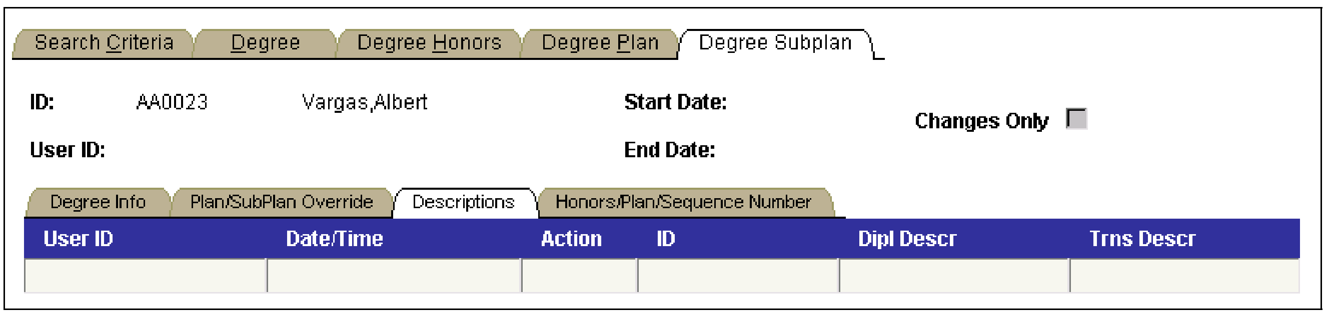
Acad Plan (academic plan) — The academic plan.

Sub-Plan — The academic subplan.

Override — Represents the Override check box on the Degree Sub-Plan page.

Descriptions Tab

Select the Descriptions tab.



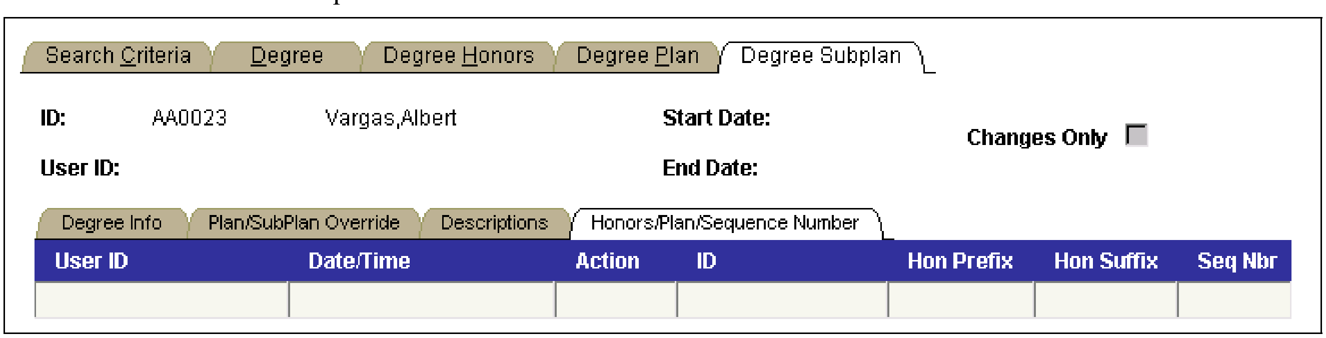
Degree Subplan page: Descriptions tab

Dipl Descr (diploma description) — The academic subplan diploma description, if different from the default.

Trns Descr (transcript description) — The academic subplan transcript description, if different from the default.

Honors/Plan/Sequence Number Tab

Select the Honors/Plan/Sequence Number tab.



Degree Subplan page: Honors/Plan/Sequence Number tab

Hon Prefix (honors prefix) — The degree honors prefix for the subplan.

Hon Suffix (honors suffix)	The degree honors suffix for the subplan.
Seq Nbr (sequence number)	The sequence number of the subplan assigned to the plan.

Applying for Graduation Through Self-Service

This section provides an overview of the self-service application process and discusses how to:

- Define self-service graduation terms.
- View academic programs.
- Specify graduation terms.
- Verify the accuracy of requests.
- Receive confirmation of successfully submitted graduation requests.

Understanding the Self-Service Application Process

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

The PeopleSoft Learner Services self-service application enables students to submit requests for graduation over the web using a single self-service transaction. A successful self-service application updates a student’s Program/Plan record with a new effective-dated row and program action of *Data Change.* The self-service application also updates the student’s degree checkout status to *Applied.* You can use the Graduation Processing and Reporting feature to select this population of students and to track and update their degree checkout progress through graduation.

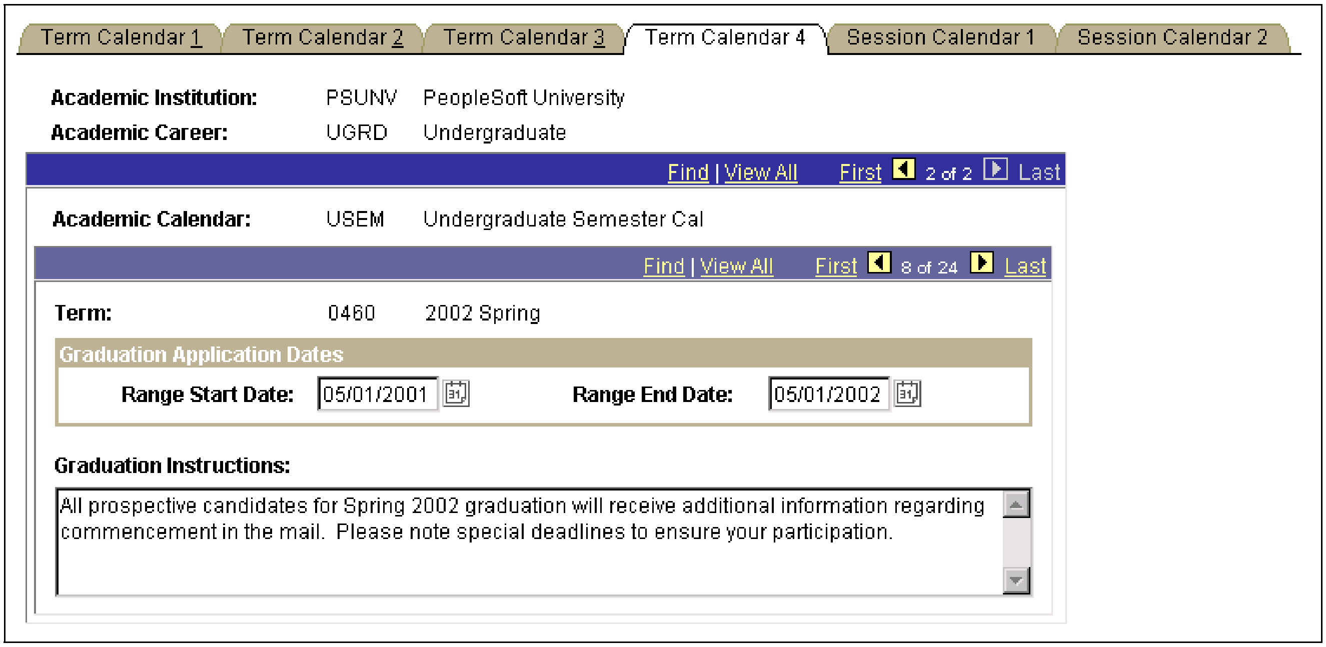
Degree checkout counselors and academic advisors who are evaluating and approving student applications for graduation, for example, can later use the Graduation Reporting component to query and identify this student as part of a larger student population in the system (students with a degree checkout status equal to *Applied*).

Pages Used to Set Up and Use the Self-Service Apply for Graduation Feature

Page Name	Object Name	Navigation	Usage
Term Calendar 4	ACAD_TERM_CAL4	Design Student Administration, Design Academic Structure, Setup, Academic Calendar, Term Calendar 4	Define valid graduation application dates for each term. The system uses the date range to control the values that students can select in the Expected Graduation Term field on the Apply for Graduation - Select Graduation Term page.
Apply for Graduation	SS_GRAD_APPLY	SA Self Service, Learner Services, Academics, Apply for Graduation	(Students) View the academic programs for which you are eligible to apply for graduation.
Apply for Graduation - Select Graduation Term	SS_GRAD_APPLY2	SA Self Service, Learner Services, Academics, Apply for Graduation	(Students) Specify the graduation term for which you are applying.
Apply for Graduation - Submit Application	SS_GRAD_APPLY3	SA Self Service, Learner Services, Academics, Apply for Graduation	(Students) Verify the accuracy of a request before it is officially submitted.
Apply for Graduation - Confirmation	SS_GRAD_APPLY4	SA Self Service, Learner Services, Academics, Apply for Graduation	(Students) Receive confirmation from the system that an application for graduation was successfully submitted.

Defining Self-Service Graduation Terms

Access the Term Calendar 4 page.



Term Calendar 4 page

Before students can use the self-service Apply for Graduation feature, you must define valid graduation terms. For each graduation term, you must specify a range of days that a student must apply within in order to apply for the graduation term. For example, you can set up a term of fall 2002 with a valid date range of September 1, 2001, through August 15, 2002. Students that use the self-service Apply for Graduation feature between the dates of September 1, 2001, and August 15, 2002, see *Fall 2002* as one of the graduation term choices.

Range Start Date

Enter the earliest date that a student using the self-service Apply for Graduation feature (and in the career you specify) can select this term as an expected graduation term. If this field is blank, the term does not appear on the Apply for Graduation self-service page.

Range End Date

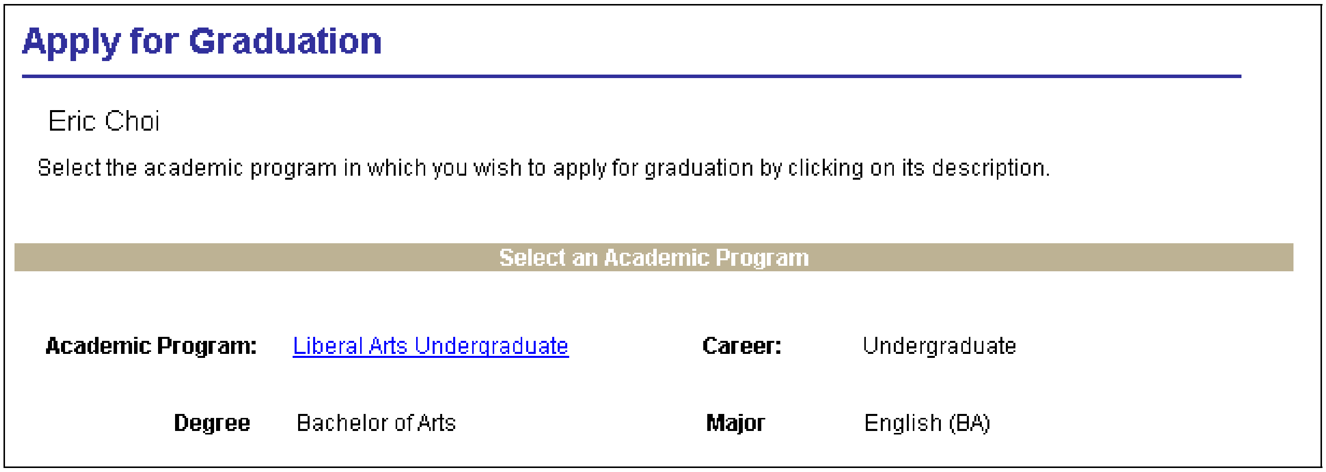
Enter the latest date that a student using the self-service Apply for Graduation feature (and in the career your specify) can select this term as an expected graduation term. If this field is blank, the term does not appear on the Apply for Graduation self-service page.

Graduation Instructions

Enter graduation instructions that you want to appear to the student after the student selects an expected graduation term.

Viewing Academic Programs

Access the Apply for Graduation page.

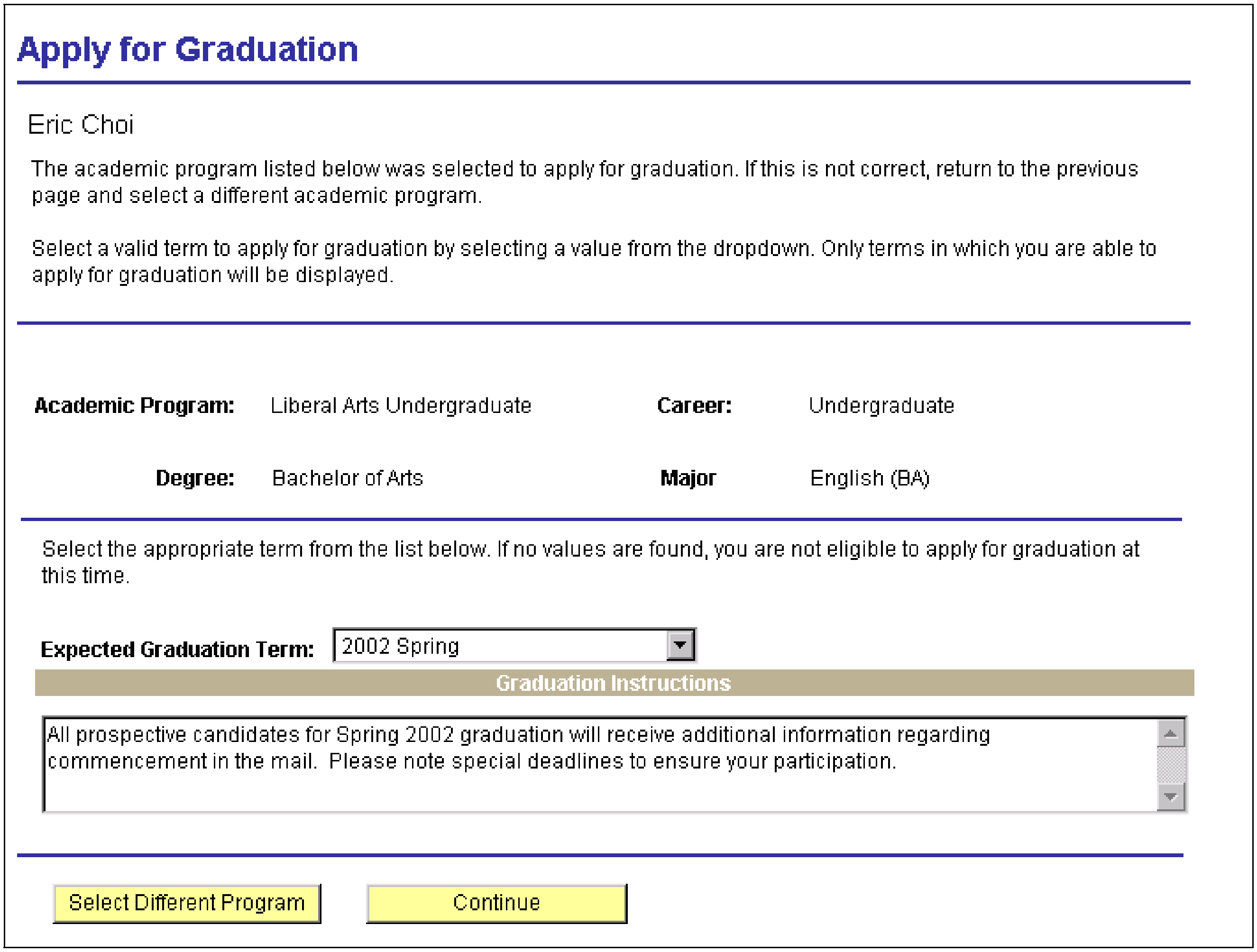


Apply for Graduation page

Academic Program Click this link to select the program for which you want to apply and to access the Apply for Graduation - Select Graduation Term page. If no programs appear, this indicates that you don't have an active academic program.

Specifying Graduation Terms

Access the Apply for Graduation - Select Graduation Term page.



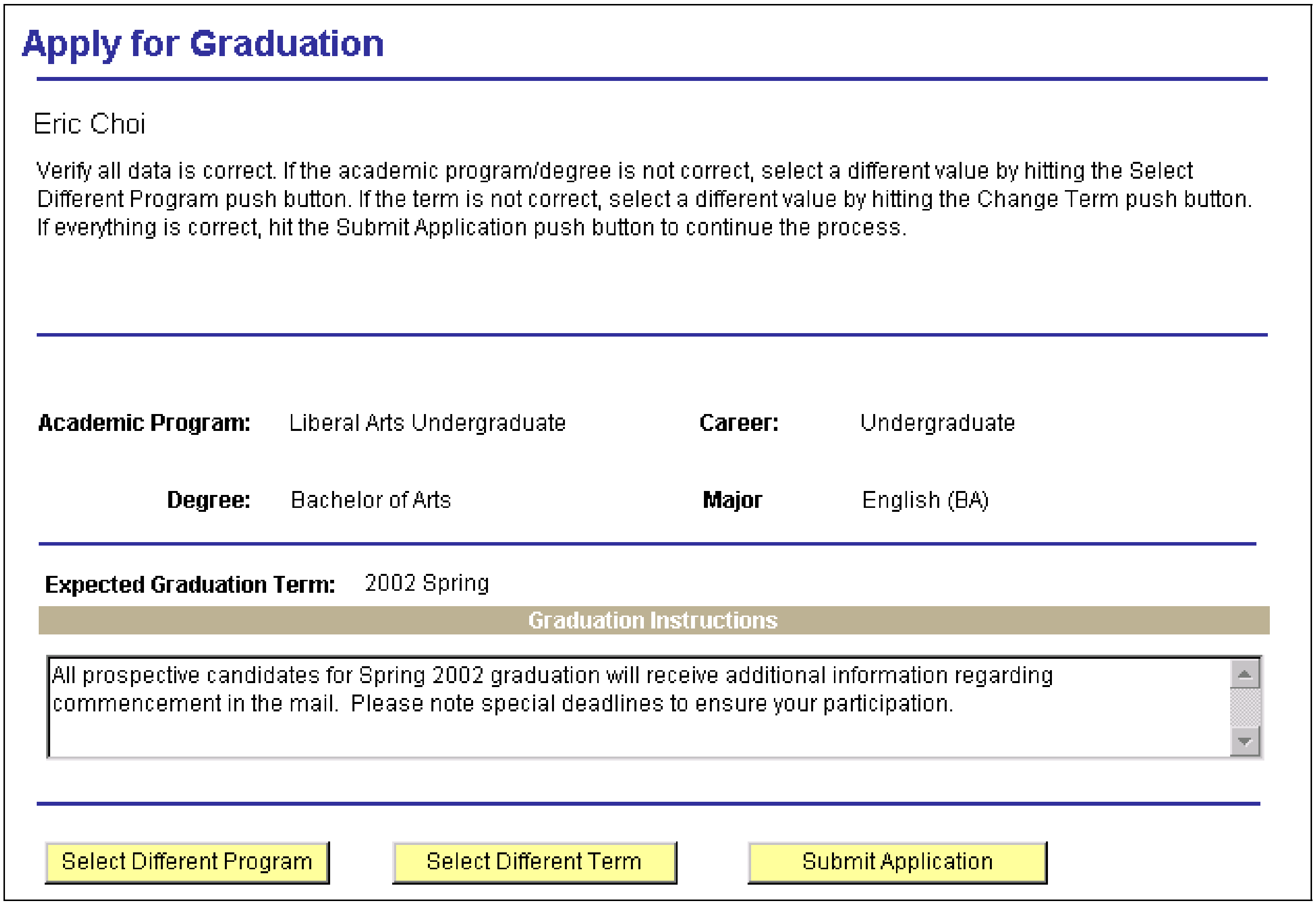
Apply for Graduation - Select Graduation Term page

Select Different Program Click this button to return to the previous page and modify your program selection.

Continue Click this button to access the Apply for Graduation - Submit Application page, where you can verify the accuracy of your graduation application before officially submitting it.

Verifying the Accuracy of Requests

Access the Apply for Graduation - Submit Application page.



Apply for Graduation - Submit Application page

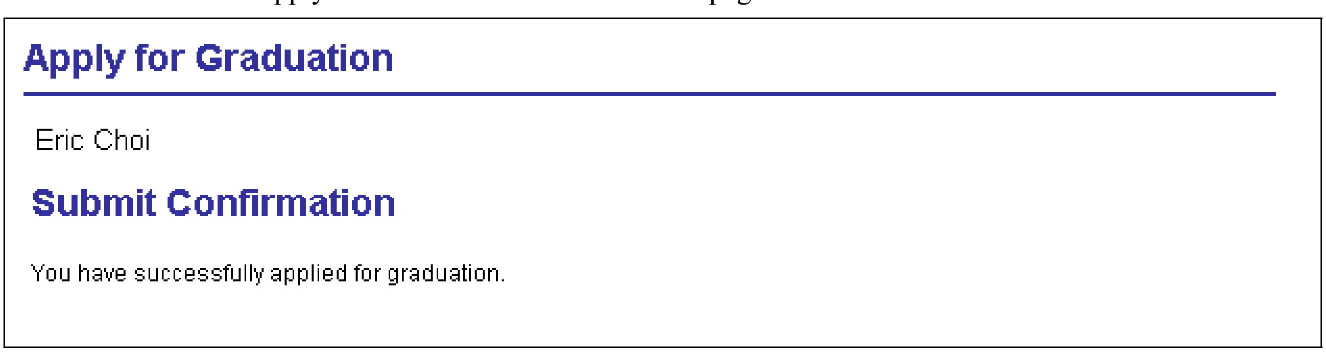
Select Different Program If the academic program is incorrect, click this button.

Select Different Term If the graduation term is incorrect, click this button.

Submit Application Click this button to submit your request for graduation. If an application is already on file for you, the system displays an error message.

Receiving Confirmation of Successfully Submitted Graduation Requests

Students access the Apply for Graduation - Confirmation page.



Apply for Graduation - Confirmation page

An Apply for Graduation confirmation indicates that the system has inserted a new row on the Student Program page with a program action of *Data Change* and has updated the Degree Checkout Status field on the Student Degrees page to *Applied*.

CHAPTER 35

Producing Transcripts

This chapter provides an overview of transcript related processes (including self-service transcript processing) and discusses how to:

- Process transcripts for a small number of students.
- Create batch transcript requests.
- Generate batch transcript requests.
- Print transcripts.
- Use the Grade Review process to release transcripts.
- Implement and use the self-service transcript feature.
- Purge transcript requests.

See Also

Chapter 13, “Setting Up Transcripts,” page 255

Understanding Transcript Production

After you have set up transcript notes, transcript types, and transcript type security, you’re ready to create transcript requests and process transcripts. The PeopleSoft Transcript feature enables you to define multiple types of transcripts at varying levels of security, formality, appearance and function. You can produce transcripts for individual students or for dynamically created groups of students that meet criteria you specify. You can process transcripts online or in the background at scheduled intervals, and you can send the results to a file, a window or a printer. Finally, the Transcript feature includes a purge process that enables you to delete transcript requests. Purging transcripts periodically is a maintenance practice that enhances system performance.

The choices you have for producing transcripts are the same as those that you have for producing advising reports. We briefly discuss advising reports in this section, but you are encouraged to review the *PeopleSoft Academic Advisement PeopleBook* for more information.

The PeopleSoft Student Records application provides you with five components that you can use to create, process, print, and purge transcript requests:

Component	Usage
Transcript Request *inquiry* component	Request, process, and print small numbers of transcripts (recommended under 20).
Transcript Request *process* component	Define group parameters and create request for large group of students (more than 20).
Transcript Generation *process* component	Process and Generate transcripts for a previously created *online* request. Generate transcripts for a previously created *batch* request.
Transcript Batch Print *process* component	Print transcripts that were previously generated through either the Transcript Request inquiry component, or the Transcript Generation process component.
Transcript Purge *process* component	Purge transcript requests and transcript results based on parameters you specify.

Each of these components is discussed in the following sections.

Processing Transcripts for an Individual Student or Small Group of Students

This section provides an overview of the Transcript Request inquiry component and discusses how to process transcripts for small groups of students.

Understanding Individual Transcript Requests

Use the Transcript Request *inquiry* component to create and update transcript requests for an individual student or small group of students. A small group of students is defined as a group of less than twenty. Process the request, and you can view the transcripts online and print them. You can also use the Transcript Request *inquiry* component to create transcript requests for processing on future dates or events. For example, a student can request that a transcript be processed once they have been awarded a degree, once their grades have been posted for a term, or once a specific date arrives. Upon saving the future transcript request, the system generates a report request number. You can then use a single report request number, a range of report request numbers, or requested print dates to process these requests in the background through the Transcript Generation page. You can also use this component to view online the transcript requests that your institution generates through the Transcript Generation page (for batches larger than 100, this is not recommended).

Here’s how to create a transcript request by student ID:

1. Select the transcript type and enter other general parameters on the Request Header page.
2. Enter IDs for students requesting transcripts, as well as recipient information, on the Request Detail page.

3. Submit your request by clicking the Process Request button on the Request Detail page.
4. View results by scrolling on the Report Results page.
5. Print results by individual student ID on the Report Results page, or print results for all students within the process request instance on the Request Detail page.

Prerequisites

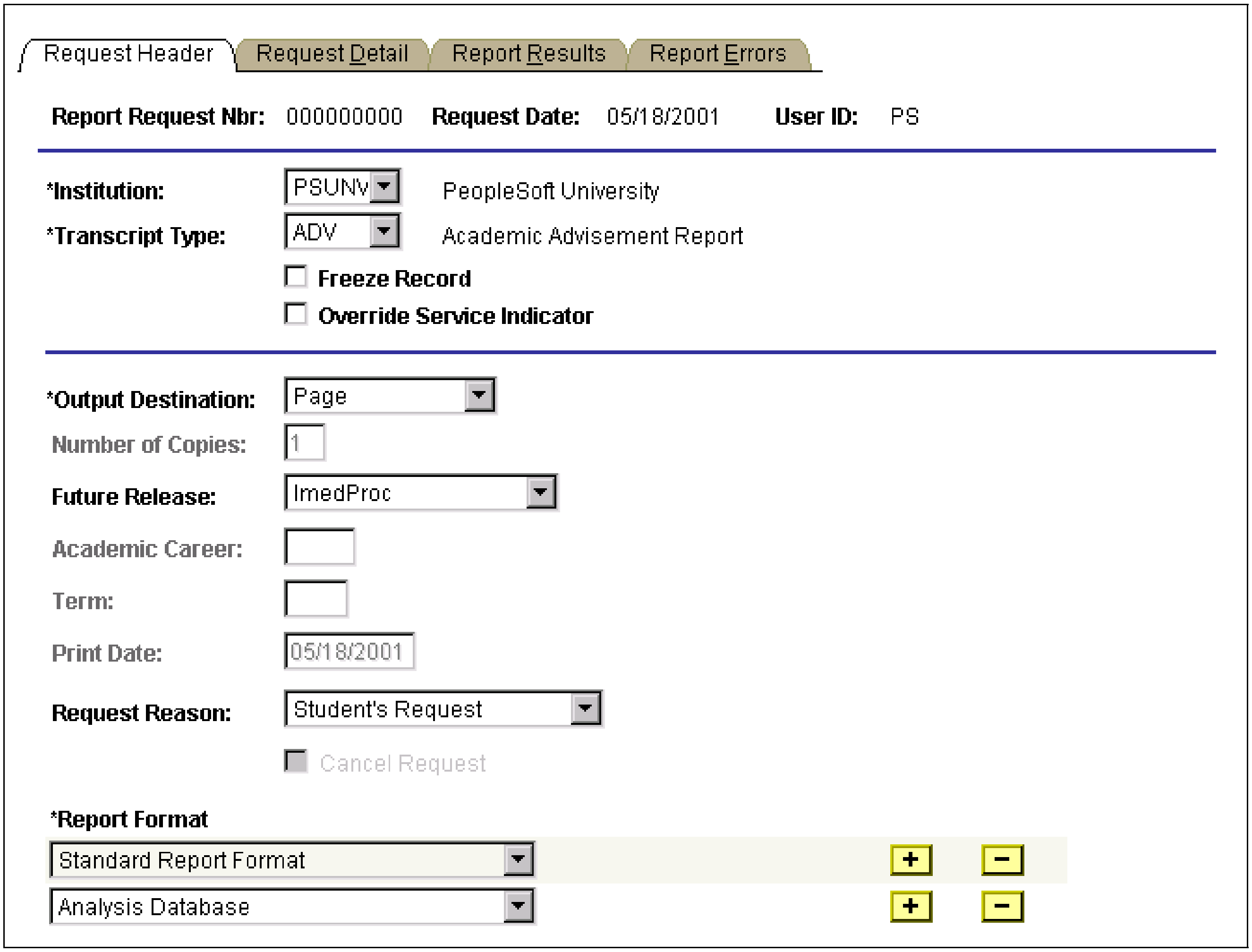
Before you can create an online transcript request, you must first create a transcript type.

Pages Used to Create an Online Transcript Request

Page Name	Object Name	Navigation	Usage
Request Header	SA_REQUEST_HEADER	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Request Header • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Header	Select the type of transcript you want to process, and to set other general parameters for the request.
Request Detail	SA_REQUEST_DETAIL	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Request Detail • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Detail	Enter the IDs that you want to process. In addition, you can specify a copy quantity.
Send to Information	SA_REQUEST_DTL_SEC	Click the Send button on the Request Detail page.	Specify a mailing address for each ID.
Report Results	SA_REPORT_RESULTS	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Results • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Results	Review online the results of your transcript request process.
Report Errors	SA_REQ_REPORT_ERR	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Errors • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Errors	Review messages about any problems the system encounters while processing the transcript request.

Creating Transcript Request Headers

Access the Request Header page.



Request Header page

Institution

The system populates this field by default. You can change this value before you enter a transcript type.

Transcript Type

Select a transcript type with the correct detail organization that you want to appear on the transcripts. The system populates this field by operator default. You can change this value. Transcript type values are defined on the Transcript Type - Basic Data page, and the Transcript Type default is defined on the User Defaults 4 page.

Freeze Record

Select to protect the request from being purged during the transcript purge process. Since requests build up quickly in your system, PeopleSoft provides a purge process to delete them. If you select this check box, the purge process does not delete the request.

Override Service Indicator

Select this check box to have the system process transcripts for all students, regardless of whether their service indicators match those specified for this transcript type on the Basic Data page.

For instance, some service impacts—if listed on the Basic Data page and attached to the student through a service indicator—might prevent a student from receiving a transcript.

See Chapter 13, "Setting Up Transcripts," Defining Transcript Type Basic Data, page 265.

See Chapter 31, "Tracking Student Data," Using PeopleSoft Student Records Service Impacts, page 711.

See *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook*, "Managing Service Indicators".

If you do not select this check box, the system enforces the service indicator rules and does not generate transcripts for students with negative service indicators that match the service impacts on the Basic Data page for this transcript type.

Output Destination

Select the output destination of the transcript. This determines where the system electronically sends the results of the process. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

Page: Sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window.

Printer: Like the *Page* option, sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window.

Number of Copies

Enter the number of copies you require when you have *Printer* selected in the Output Destination field. The system populates this field by default to *1.* You can override the number of copies for each student on the Request Detail page.

Future Release

Select a future release value to indicate that you want the system to print the transcript at a later date. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Your choices are:

Degree: The Career and Term fields become available for entry.

Grades: The Career and Term fields become available for entry.

Hard Date: The Print Date field defaults to the current date and is available for entry. You can enter a specific date for the transcript request to be processed through the Transcript Generation page.

Hold: The Print Date field defaults to the current date and is available for entry. This option indicates that you are going to process the request at a later and as yet undetermined time. The system saves this request until you change the future release value and enter a specific print date.

Imed Proc (immediate processing): The Print Date defaults to the system date. This value is used as the online default, as well as by self-service.

Transfr Cr (transfer credit): The Print Date field defaults to the current date and becomes available for entry. You can issue a transcript through the Transcript Generation page once the system has articulated transfer credit to the student's academic record. This is not an automatic process.

Academic Career and **Term** If available for entry, select the appropriate academic career and term values, and you can later issue a transcript through the Transcript Generation page upon the fully graded date (future release value of *Grades*) or once you award degrees for the students (future release value of *Degree).* The system populates the Print Date field with either the fully graded date from the Academic Term Calendar 3 page, or the degree confer date from the Academic Term Calendar 3 page. Term values are defined on the Term Table page.

To create transcripts for future release, enter the request parameters and save the request without processing it. To later process and print the future release request, enter into the Transcript Generation page a single or range of report request numbers or requested print dates. The system processes requests for all transcripts due to print within the range you specify. Once you process a transcript request, the system marks the report request ID as complete and the system excludes it from further processing.

The following table displays the way various Future Release field values impact the enabling and disabling of the Academic Career, Term, and Print Date fields:

Field Value	Academic Career	Term	Print Date
Degree	available for entry	available for entry	unavailable for entry (defaults to Degree Confer Date for Term)
Grades	available for entry	available for entry	unavailable for entry (defaults to Fully Graded Date for Term)
Hard Date	unavailable for entry	unavailable for entry	available for entry (defaults to system date)
Hold	unavailable for entry	unavailable for entry	available for entry (defaults to system date)
Imed Proc (default)	unavailable for entry	unavailable for entry	unavailable for entry (defaults to system date)
Transfr Cr	unavailable for entry	unavailable for entry	available for entry (defaults to system date)

Future Release Values

Request Reason

Select the request reason. The reason appears on the transcript if the transcript type is set to display request reason information. Values for this field are delivered with your system as translate values. You can modify these values.

Cancel Request

Select this check box to cancel a future dated transcript request before it is processed.

Report Format

With a transcript type that includes an advising report, the Report Format field becomes available for entry. A single report request can have multiple report formats. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. You choices are:

Standard Report Format: Indicates that the report is delivered to a page or printer.

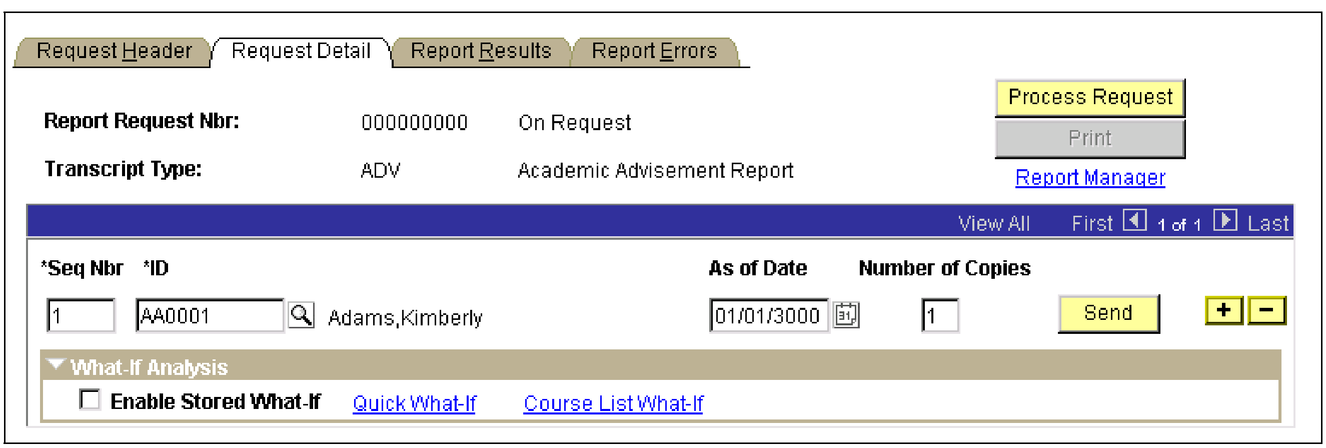
Analysis Database: Indicates that the results of the report are written to the analysis database. The results are stored in computer-readable format so application programs can be written against the tables to create user configurable reports. (This is the only field value that refreshes the database tables.)

Completed Only: Indicates that the report contains only those requirement groups that have been wholly completed. (Normally, the advising report bolds incomplete requirement groups and requirements while completed requirement groups are not bold.)

Incompleted Only: Indicates that the report contains only those requirement groups that have not been wholly completed. (This field value can help a counselor determine exactly what a student needs to satisfy in order to graduate.)

Specifying Students for Evaluation

Access the Request Detail page.



Request Detail page

This page is used to process both Transcripts and Advising Reports.

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, “Processing Academic Advising Reports,” Selecting Advising Transcripts for Processing.

Sequence Number The system determines the sequence number, and the number is the order in which the transcripts are processed.

ID Enter IDs of students for whom you want to process transcripts. The system populates the name by default once you enter the ID and tab out of the field.

Copies Although you can indicate the overall number of copies on the Request Header page when you select *Printer* as your output destination, you can override the number on a student by student basis by changing the value in this field.

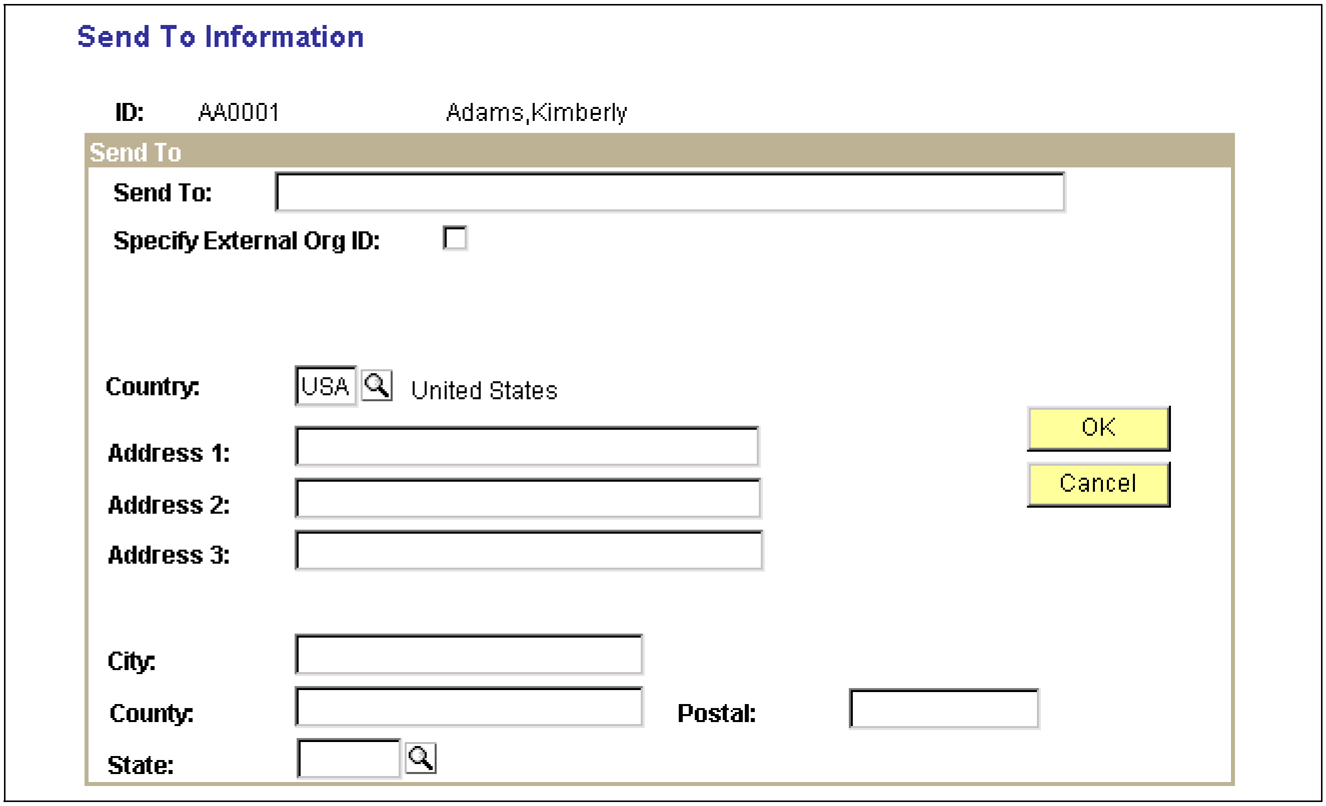
Process Request Click when you are ready to submit the request for processing. A COBOL/SQL process commences and, when complete, the system displays the results on the Report Results page and automatically opens that page.

Print After you have successfully completed the transcript request process, the Print button on the Request Detail page becomes available. Click the button to submit the Crystal to the Report manager. Use the Report Manager link to view and print the Crystal output, which the system sorts by Student Name within Transcript Request ID. Click the Print button on the Crystal window and choose whether you want to print all pages or a range of pages. When you have large groups of transcripts to print, clicking the Print All button significantly reduces the time it takes you to print them. You can also print transcripts by individual student ID by clicking the Print button on the Report Results page.

Send Before you process the report request, click to enter recipient information for each ID.

Entering Transcript Recipient Information

Access the Send to Information page.



Send To Information page

Send To The name of the addressee.

Specify External Org ID Select to send the transcript to an external organization that you already have in your database.

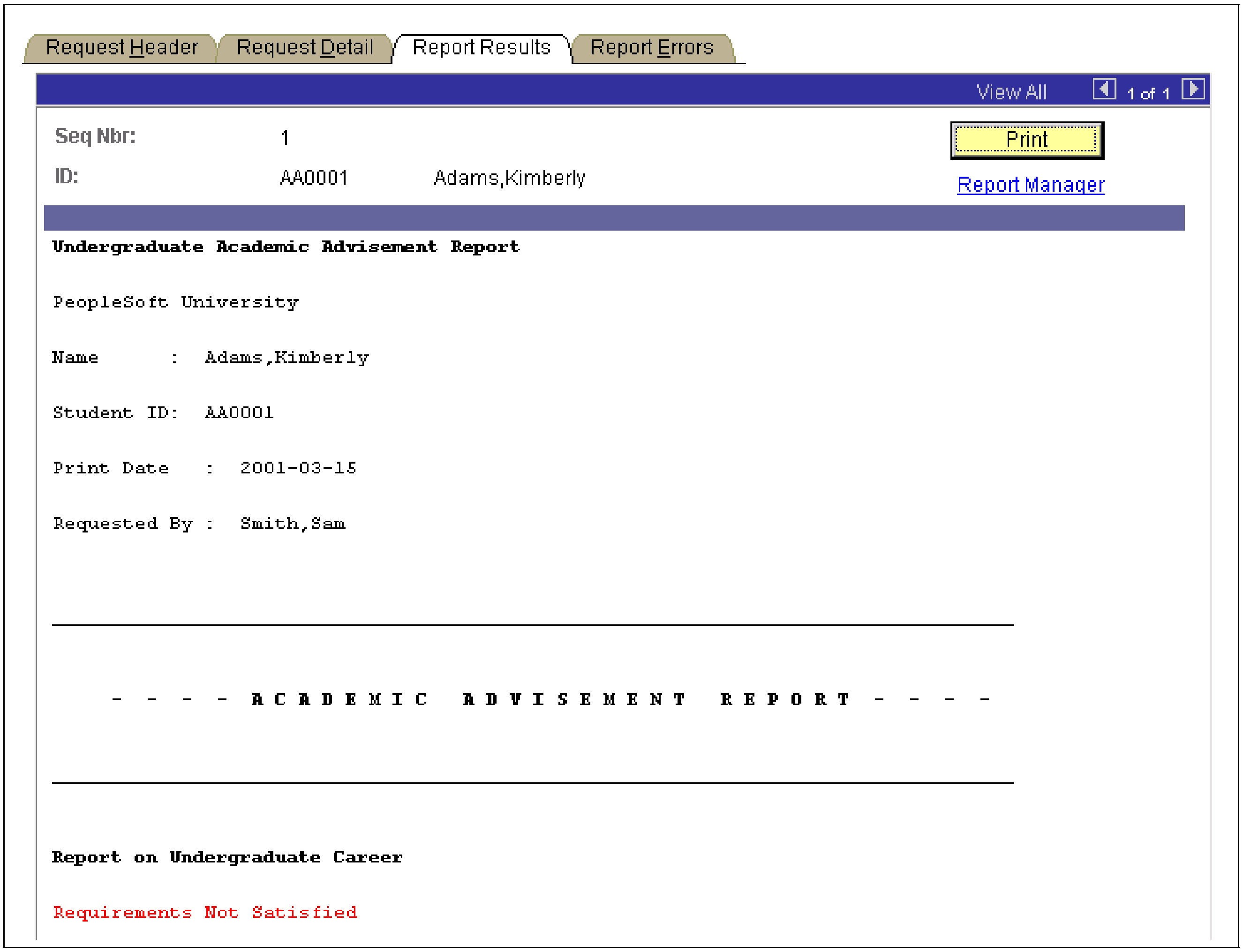
Org ID Select the appropriate external organization ID number. If you do not select the Specify External Organization ID check box, enter the name and address of the recipient in the available address fields.

OK Click to save and exit the page.

Cancel Click to exit the page.

Viewing Transcript Results

Access the Report Results page.



Report Results page

Print

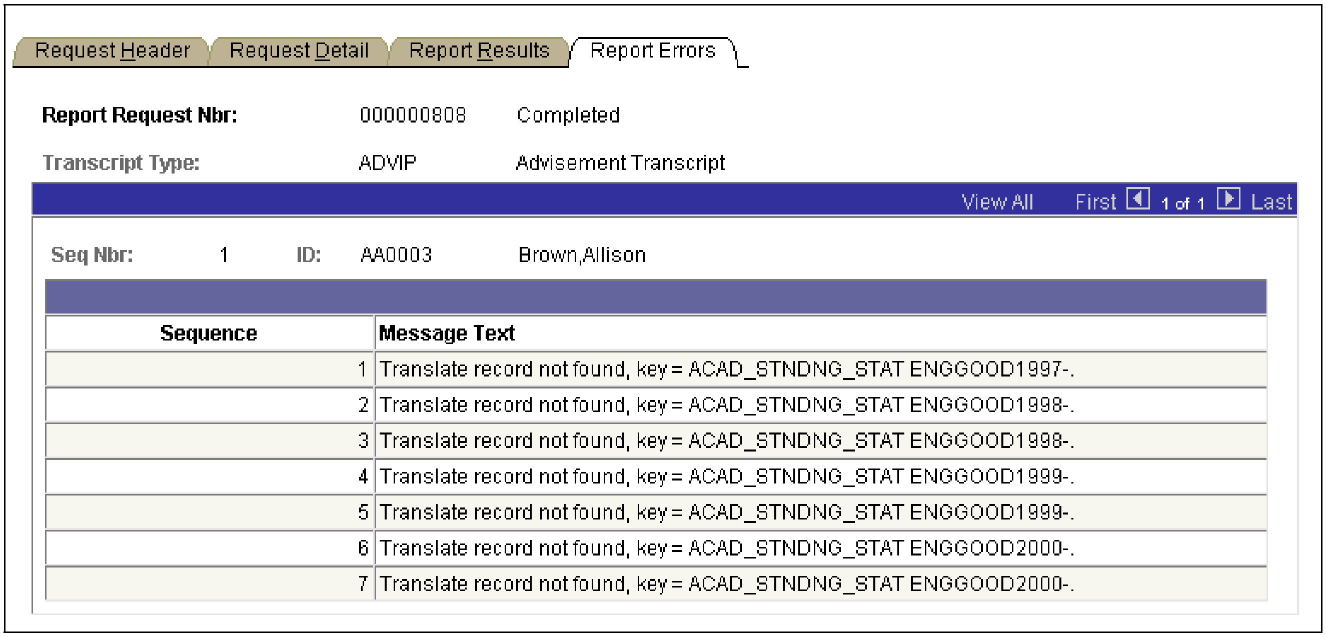
Click to submit the Crystal to the Report manager. Use the Report Manager link to view and print the Crystal output. Click the Print button on the Crystal window and choose whether you want to print all pages or a range of pages. When you have large groups of transcripts to print, clicking the Print All button significantly reduces the time it takes you to print them. You can also print transcripts by individual student ID by clicking the Print button on the Report Results page.

To print transcripts for multiple students whose transcripts you have processed within this report request number, click the Print button on the Request Detail page then click Print All from the Crystal window. If necessary, you can save the transcript request and both process and print the request at a later time.

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the*PeopleSoft Student Administration Reports PeopleBook* (for hard copy users).

Viewing Process Messages for Transcript Requests

Access the Report Errors page.


Request Header | Request Detail | Report Results | Report Errors

Report Request Nbr: 000000808 Completed

Transcript Type: ADVIP Advisement Transcript

View All First 1 of 1 Last

Seq Nbr: 1 ID: AA0003 Brown,Allison

Sequence	Message Text
1	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD1997-.
2	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD1998-.
3	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD1998-.
4	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD1999-.
5	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD1999-.
6	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD2000-.
7	Translate record not found, key = ACAD_STNDNG_STAT ENGGOOD2000-.

Report Errors page

Sequence After you run the process, the system displays the sequence number in the Sequence column.

Message Text The message text explains the message or error, if any.

Creating Batch Transcript Requests

The Transcript Request process component enables you to create transcript request for a large group of students at one time based on a specific academic institution and transcript type, and based on additional selection criteria and key values that you specify to define the group. For example, you can use this component to create transcript requests for all senior level undergraduates for the fall term, or you can create academic advisement transcript requests for all undergraduate accounting majors.

Here's how to create a batch transcript request:

1. Specify the parameters for which you want to create transcript requests on the Batch Transcript Request page.
2. Click the Run button on the Batch Transcript Request page to create your request.
3. Once the Transcript Request process completes, view the Message Log and note the Transcript Request Number. You can enter the Transcript Request Number on the Transcript Generation page to generate the transcripts.

Note. To process transcript requests for individual student IDs, use the Transcript Request inquiry component.

Prerequisites

Before you can process a batch transcript request, you must:

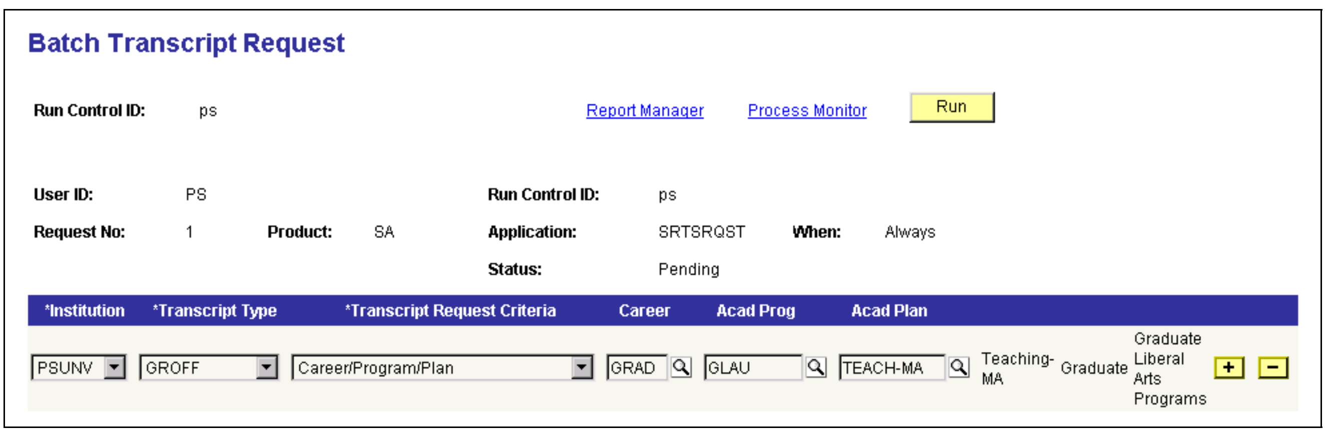
- Define your run control ID.
- Define transcript types and any of the key values that you want to use as search criteria.

Pages Used to Create Batch Transcript Requests

Page Name	Object Name	Navigation	Usage
Batch Transcript Request	RUNCTL_SRTSCRPT	Manage Student Records, Manage Academic Records, Process, Transcript Request, Batch Transcript Request	Select the institution and type of transcript that you to want process, select the criteria for the group of students, and create the transcript requests for all students who meet your selection criteria. This process creates a request only, and does not generate a transcript. To generate transcripts, use the Transcript Generation component.

Defining Batch Transcript Requests

Access the Batch Transcript Request page.



Batch Transcript Request page

Institution Select the institution for which the transcript type is associated. Add rows as necessary. When you run the process, the system creates a transcript request number for each row within the process instance. Institution values are defined on the Academic Institution Table page.

Transcript Type Select the transcript type. Be sure you select a transcript type with the correct detail organization that you want to appear on the transcripts. You can organize by academic career or chronologically. Academic advising reports can include both an advising report and a regular transcript. When transcript types have the Advising Report check box or the Special Advising report check box selected on the Basic Data page, the transcript includes an audit of academic requirement groups. Transcript type values are defined on the Transcript Type - Basic Data Page.

If you select an advising transcript type, the Use Stored What-If, Database Report, and As of Date fields become available for entry.

Use Stored What-If

Select to process the batch of advisement reports based on stored what-if information for each student (as opposed to actual student academic career, academic program, academic plan and academic sub-plan information). For example, a student may have a stored what-if scenario set up for them that has an alternate combination of academic program, academic plan, academic sub-plan, requirement term and so on. With the Use Stored What-If check box selected, the system uses the hypothetical "what-if" data, rather than the student's actual data from the Track Student Careers component.

See *PeopleSoft 8 SP1 Academic Advisement PeopleBook*, "Processing Academic Advising Reports," Entering Quick What-If Parameters.

Database Report

Select this check box to update the academic advisement analysis database with the results of the transcript request (at the time of the Transcript Generation process.) Specific data for each student based on their respective requirements is then available for query and reporting. For example, you may run an advisement report with the Student Group option and Athlete selected, thereby populating the analysis database with advising results for student athletes. You may then query those tables to create user configurable reports for all athletes at a later date.

As of Date

Set the As of Date field as appropriate to include or exclude future-dated academic programs, academic plans, academic sub-plans, conditions, and entity groups when you process any type of academic advising report.

At the start of the advising report process (on the Transcript Generation page), the system references the value in the As of Date field to determine which student_car_term records are active for each student. Active records are defined as rows on the Track Student Careers component with an effective date that is equal to or less than the as of date and have a program action of *activate, data change, plan change, program change,* or*readmit.* Once the system identifies the active rows, it compares the student's career, program, plan, sub-plan and requirement term information against the appropriate academic requirement groups. Appropriate academic requirement groups are defined as those with effective dates that are equal to or less than the start date of the student's requirement term. Regardless of the As of Date value, the system evaluates all courses on a student's transcript (future dated or otherwise).

Note. As delivered by PeopleSoft, the system populates the As of Date field by default to 01/01/3000, but you can modify the date each time you run the process. To set the As of Date field default to always use the current date, go to the Installation Student Administration page and set the Transcript Default As of Date field such that it is blank (in other words, make sure the field is empty).

Transcript Request Criteria

Use to select the batch processing criteria and to further describe the group. Your choices are:

Career/Program/Plan: If you select this option, the Career, Acad Program (academic program), and Acad Plan (academic plan) fields become available for entry.

Academic Level: If you select this option, the Career, Term, and Level fields become available for entry. The values in all three of these fields intersect to form a single criterion set.

Advisor: If you select this option, the Advisor field becomes available for entry.

Student Group: If you select this option, the Student Group field becomes available for entry.

Career

Creates transcript requests for all students within the academic career you specify. Academic career values are defined on the Academic Career Table page. This field is required.

Acad Program (academic program)

Creates transcript requests for all students within the academic career and academic program that you specify. Academic program values are defined in the Academic Program Table component.

Acad Plan (academic plan)

Creates transcript requests for all students within the academic career, academic program, and academic plan that you specify. Academic plan values are defined on the Academic Plan Table page.

Term

Creates transcript requests for all students that are term activated in the academic career and academic level as of the term you specify. Term values are defined on the Term Table page. This field is required.

Academic Level

Creates transcript requests for all students within the academic career and academic level as of the term you specify. Academic level values are defined on the Academic Level Table page. This field is required.

Advisor

Creates transcript requests for all active students who are assigned to this advisor on the Student Advisor page. This field is required.

Student Group

Creates transcript requests for all students who are active within the student group you specify. Student group names are defined on the Student Group Table page, and assigned to students on the Student Groups page. This field is required.

Click Run to run this request. When you click the OK button, an Application Engine process commences, scanning the database and creating transcript requests for the students that match your selection criteria. Once the Run Status for SRTSRQST process is Success, you can generate the transcripts on the Transcript Generation page. Be sure to click the Message Log link on the Process Detail page to note the system generated Transcript Request Numbers. You will need this number to generate transcripts on the Transcript Generation page, and to print transcripts on the Transcript Print page.

Generating Batch Transcript Requests

This section provides an overview of the Batch Transcript Generation component and discusses how to generate previously processed transcript requests.

Understanding the Transcript Generation Component

The Transcript Generation component enables you to generate previously created transcript requests that you saved through the Transcript Request inquiry page, or that you processed through the Transcript Request process component.

This component is ideal for generating transcripts that students have requested for release on future dates or after specific events.

For example, students can request future release of their transcripts based on degree confer date, term grade posting date, transfer credit posting date, or a date you specify. Once the future date arrives, you can access the Transcript Generation component, enter the transcript type you want the system to process, enter a single or range of Report Request Numbers or Requested Print Dates, and generate the transcripts. For example, if a student knows in March that they need a transcript sent to a specific institution on June 15, the date of graduation, this request can be entered and saved online with a future date of June 15 on the Transcript Request page in March. On June 15, this request can be processed through the Transcript Generation component and the system will generate this student's transcript as well as all other requests scheduled for processing on this date.

After you have run the process through the Transcript Generation page, you can access the transcripts in the Transcript Request *inquiry* component, or you can print these transcripts through the Transcript Batch Print component.

Here's how to generate transcripts:

1. Go to the Transcript Generation page and enter your processing parameters, including the Transcript Request Number range if necessary.
2. Click the Run button on the Transcript Generation page. To send the transcripts to a file or a printer, use the Transcript Batch Print component.

Prerequisites

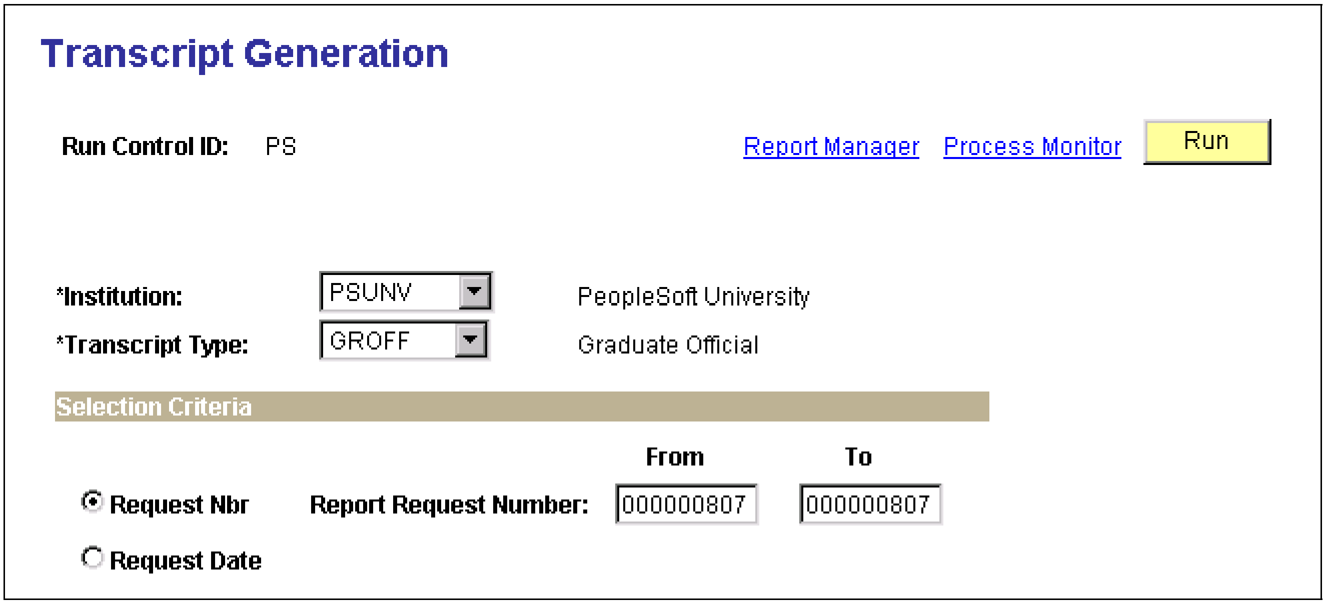
You must first create your transcript requests, either in online or batch mode.

Pages Used to Generate Transcripts

Page Name	Object Name	Navigation	Usage
Transcript Generation	RUNCTL_SRTSBGEN	Manage Student Records, Manage Academic Records, Process, Transcript Generation	Select the type of transcript to generate, the range of Report Request Numbers or Requested Print Dates, and generate transcripts for all requests that meet your criteria.

Defining Transcript Generation Parameters

Access the Transcript Generation page.



Transcript Generation page

Institution Select the Institution that the system should use in the process. Institution values are defined on the Academic Institution Table page. This field is required.

Transcript Type Select the transcript type. Transcript type values are defined on the Transcript Type - Basic Data Page. Be sure you select a transcript type that matches the pending request you want to generate.

Request Nbr (request number) Select this option to indicate that you want to generate transcripts for one or a range of Report Request Numbers.

From and **To** Enter the report request numbers into the From and To fields. These two fields can contain the same report request number.

Request Date Select this option to indicate that you want to generate transcripts for transcript requests with print date values within a certain date range. Print date values are specified in the Print Date field on the Request Header page.

From and **To** Enter the dates into the From and To fields. These two fields can contain the same date.

Click the Run button when you are ready to submit the transcript requests for generation. A COBOL/SQL process commences, scanning the database and collecting the student transcript records that match your selection criteria. The system generates transcripts for requests that have been previously saved through the Transcript Request page, and for transcript requests that have been created through the Batch Transcript Request page. Process Scheduler runs the Transcript Generation process at user-defined intervals.

Printing Transcripts for Single Transcript Requests

This section discusses the prerequisites and pages used to print a single transcript request.

Prerequisites

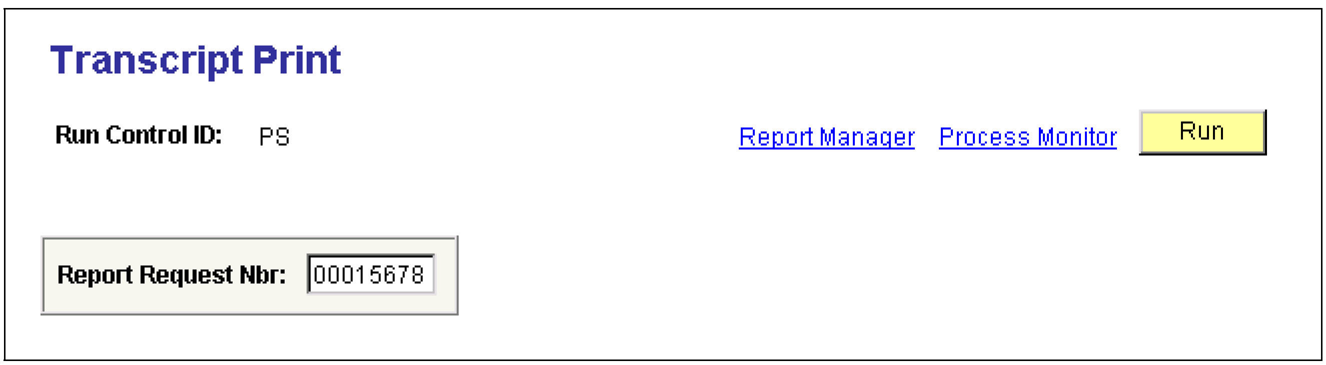
You must first generate transcripts through either the Transcript Request inquiry component or the Transcript Generation process component.

Pages Used to Print Transcripts for Single Transcript Requests

Page Name	Object Name	Navigation	Usage
Transcript Print	RUNCTL_SRTRPRINT	Manage Student Records, Manage Academic Records, Process, Transcript Print, Transcript Print	Print transcripts associated with a single transcript request number.

Printing Single Transcript Requests

Access the Transcript Print page.



Transcript Print page

Report Request Nbr (report request number) Enter the report request number that corresponds with the transcript request that you want to print. This field is required.

Printing Transcripts for a Range of Transcript Requests

This section discusses the prerequisites and pages used to print a large range of transcripts.

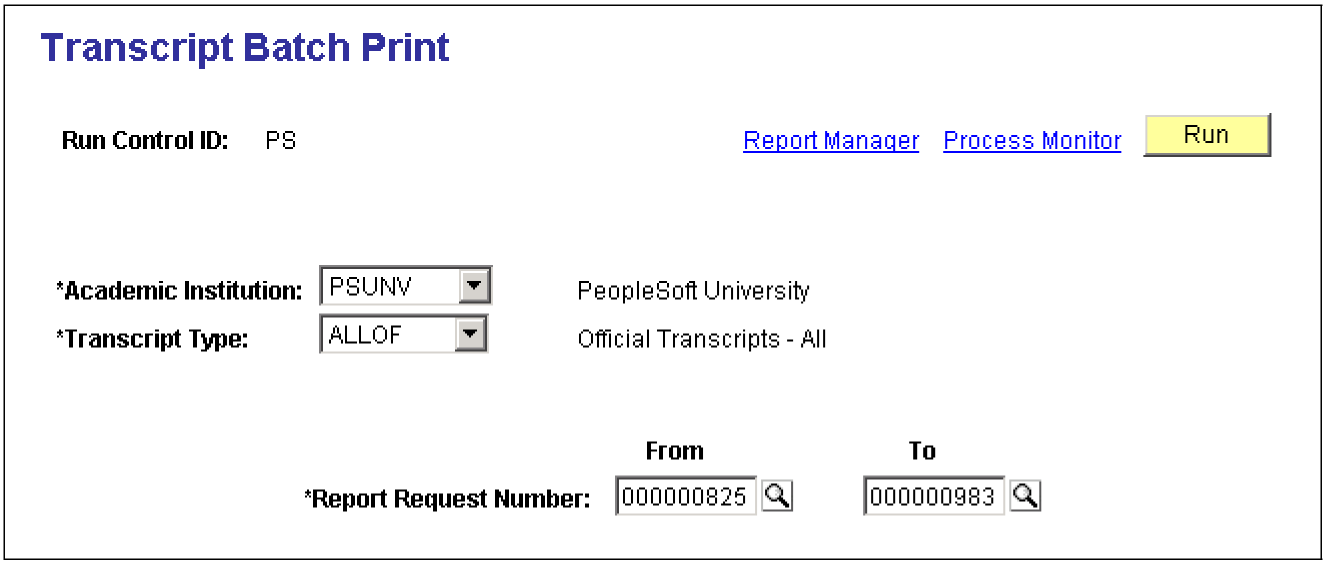
Prerequisite

You must first generate transcripts through either the Transcript Request inquiry component or the Transcript Generation process component.

Page Used to Print a Range of Transcript Requests

Page Name	Object Name	Navigation	Usage
Transcript Batch Print	RUNCTL_SRTSCPRT	Manage Student Records, Manage Academic Records, Process, Transcript Batch Print	Enter the parameters for which you want to print generated transcript requests.

Access the Transcript Batch Print page.



Transcript Batch Print page

Academic Institution The institution for which you want to generate transcripts.

Transcript Type The type of transcript you want to print.

Report Request Number From The beginning of the transcript request number range that you want to print. Prompt to select from report requests that correspond to the institution, transcript type, and have a status of *Completed.*

Note. The process does *not* print transcripts within your range that have a status of *Printed.*

Report Request Number To The end of the transcript request number range that you want to print. Prompt to select from report requests that correspond to the institution, transcript type, and have a status of *Completed.*

Note. The process does *not* print transcripts within your range that have a status of *Printed.*

Run Click to run the SRTSBTPR process, and create the printable transcripts with Crystal report SR778BT. The system sorts the transcripts by Student Name within Transcript Request ID.

Using the Grade Review Transcript Release Process

Using the Grade Review Transcript Release process, you can update your students' fully graded date and grade review status in batch mode, then process transcripts or degree audits for students who meet your specific run control parameters. Essentially, this process releases transcripts or degree audits only if a student's classes are fully graded for the term. If some required grades are missing, the process does not generate a transcript. Instead, it assigns a special grade review value to the student so that they can be easily identified for future processing.

Here's how to use the Grade Review process:

1. Set up Grade Review values on the Grade Review Table page.
2. Set specific grade bases as *required* on the Grading Scheme Table page.
3. Process Grade Reviews.
4. View the grade review information on the Student Grade Review page.
5. View fully graded date information on the Term Control dates page.
6. View the transcripts through the Transcript Request component.

Prerequisites

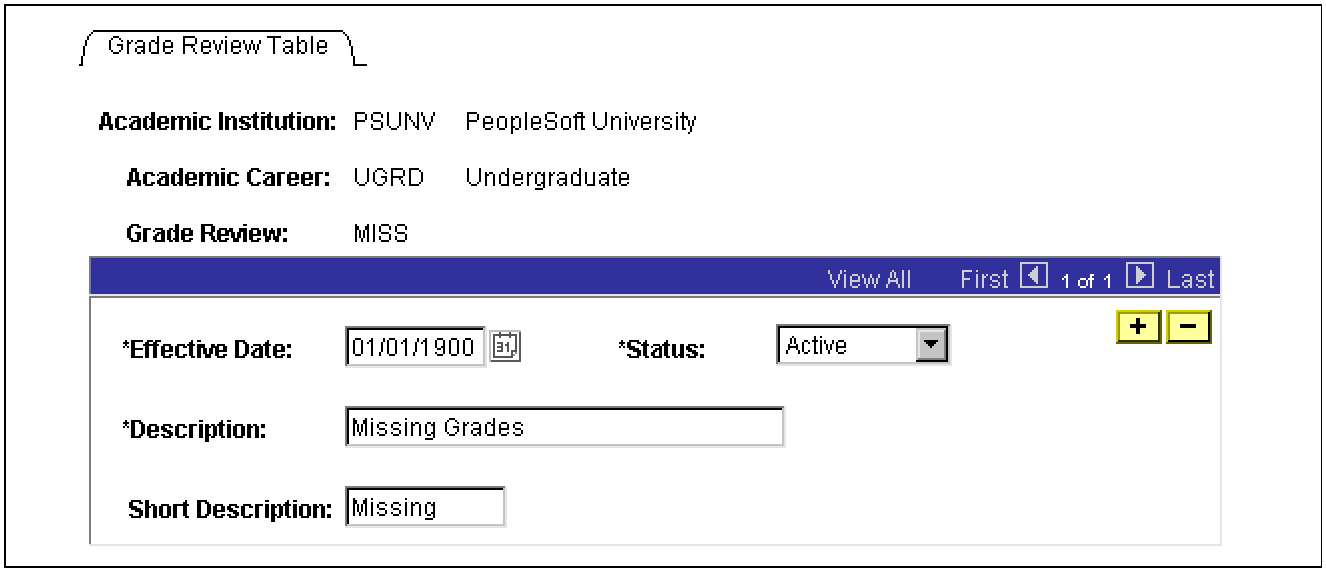
Define grade review status values and transcript types.

Pages Used to Run the Grade Review Process

Page Name	Object Name	Navigation	Usage
Grade Review Table	GRD_REVIEW_TABLE	Design Student Administration, Define Student Records, Setup, Grade Review Table, Grade Review Table	Define different values that you want to assign to students as a result of the grade review process. For example, *MISS* for *missing grades, PEND* for *pending grade review,* and *COMP* for *completed all grades.* The system assigns these values to students on the Term History - Student Grade Review page, based on the status of the students' grades for the term you specify.
Grading Scheme Table	GRADING_SCHEME_TBL	• Design Student Administration, Define Student Administration, Setup, Grading Scheme Table, Grading Scheme Table • Manage Student Records, Establish Courses, Setup, Grading Scheme Table, Grading Scheme Table	Define those Grade Bases that you want to require. Specifically, the system references the Grade Required check box setting to determine if a student's transcript can be released or not. Students that are enrolled in classes with a grade basis that is set to Grade Required, must have all of their grades entered and posted for a specific term in order for the system to release their transcript through the Grade Review process.
Grade Review	RUNCTL_SRGRDREV	Manage Student Records, Manage Academic Records, Process, Grade Review	Specify the group of students that you want to evaluate for fully graded data, to define your processing parameters, to enter the values that you want to assign to the students' records, and to run the SRPCGRDR (Grade Review) process.

Setting Up Grade Review Values

Access the Grade Review Table page.



Grade Review Table page

Effective Date Enter an effective date for this grade review status. The effective date defines when the status that you select is valid.

Status Select a status for this grade review status. Select *Active* when adding a new grade review status. The *Inactive* option should only be used if your institution will no longer use this grade review status.

Description Enter a description for this status. The description appears in related display on the Student Grade Review page.

Short Description Enter a short description for this status.

Specifying Required Grade Bases

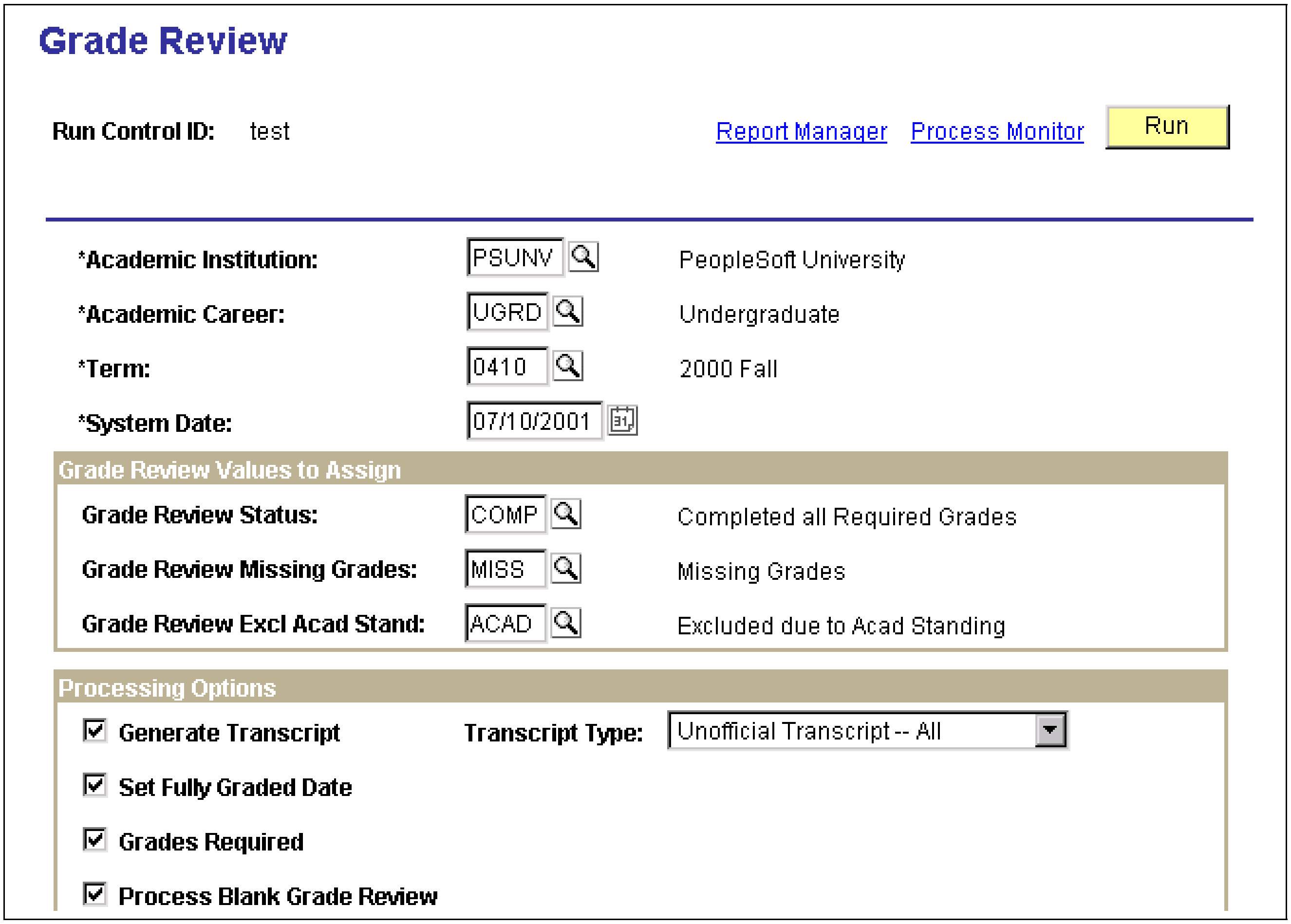
Access the Grading Scheme Table page.

See Also

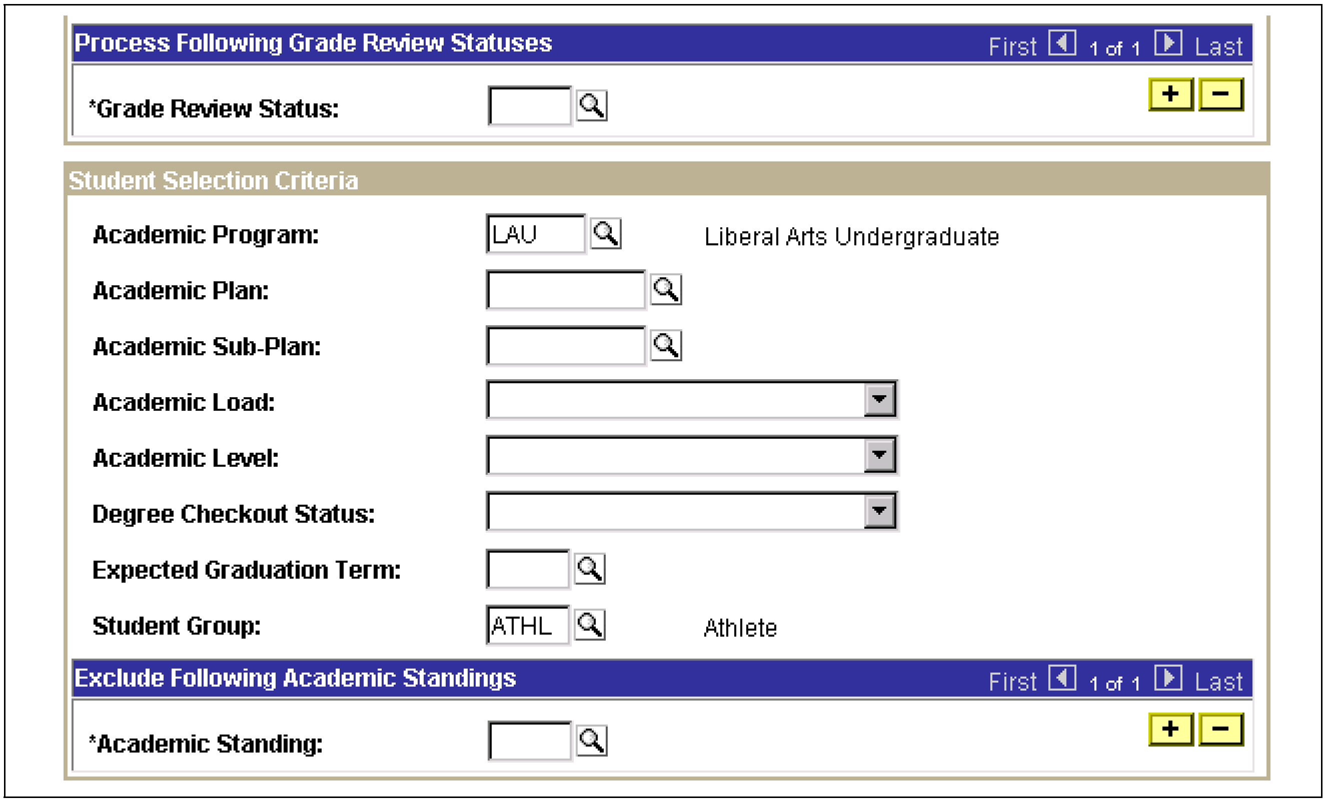
Chapter 11, "Setting Up Grading," Defining Grading Schemes, page 237

Defining Grade Review Parameters

Access the Grade Review page.



Grade Review page (1 of 2)



Grade Review page (2 of 2)

Academic Institution — The institution for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.

Academic Career — The academic career of students for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.

Term — The term for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.

System Date — The process assigns this date to the student records when it assigns new grade review values. For example, if a student is fully graded, and meets all other processing parameters, her grade review status is set to COMP on the Student Grade Review page, with an effective date equal to the system date. In addition, if you select the Set Fully Graded Date check box, the system sets her fully graded date to the system date on the Term Control Dates page.

Grade Review Status — The status to assign to a student on the Student Grade Review page if the system finds her to be fully graded for the term.

Grade Review Missing Grades — The status to assign to a student on the Student Grade Review page if the system finds her to be in acceptable academic standing, but lacking fully graded enrollment records for the term. If a student is neither fully graded, nor in acceptable standing, the system assigns the Grade Review Excl Acad Stand field value to the student on the Student Grade Review page.

Grade Review Excl Acad Stand (grade review excluded due to academic standing)

The status to assign to a student on the Student Grade Review page if the system finds here to be fully graded, but her academic standing for the term is equal to the value in the Academic Standing field. If a student is neither fully graded, nor in acceptable standing, the system assigns the Grade Review Excl Acad Stand field value to the student on the Student Grade Review page.

Generate Transcript

Select to process transcripts for the students in your selected population.

Warning! If you select the Generate Transcript check box and run the Grade Review process, the system immediately generates transcripts (not just transcript request numbers) for all students in your population. Depending on the size of your population and the transcript type you select, this process could take a substantial amount of time to complete.

Transcript Type

The type of transcript that you want to generate.

Report Format

If you select a transcript type that is an advising report, the Report Format field is available for entry. Your choices are:

Standard Report Format: Indicates that the report is delivered to a page or printer.

Analysis Database: Indicates that the results of the report are written to the analysis database. The results are stored in computer-readable format so application programs can be written against the tables to create user configurable reports. (This is the only field value that refreshes the database tables.)

Completed Only: Indicates that the report contains only those requirements that have been wholly completed. (Normally, the advising report marks in bold incomplete requirement groups and requirements while completed requirement groups and requirements are not bold.)

Incompleted Only: Indicates that the report contains only those requirements that have not been wholly completed. (This field value can help a counselor determine exactly what a student needs to satisfy in order to graduate.)

Set Fully Graded Date

Select to set students' fully graded date (on the Term Control Dates page) to the system date you specify in the System Date field. The system sets the fully graded date only if the process assigns a new grade review status to the student. If no grade review status is assigned, the fully graded date field does not update. Clear this check box if you never want to update the fully graded date.

Grades Required

Select to have the system use the Grade Required check box setting on the Grade Scheme Table page to determine if grades are missing. If you select this check box, the system only evaluates courses taken with grade bases where the Grade Required check box is selected. If you clear this check box, students in the population will get set regardless of whether their grades are in.

Process Blank Grade Review

Select to include in your student selection students with no grade review value.

Grade Review Status	Enter the current grade review status of students that you want to process. Add rows to specify more than one valid grade review status value.
Academic Program	The academic program of the students you want to review.
Academic Plan	The academic plan of the students you want to review.
Academic Sub-Plan	The academic sub-plan of the students you want to review.
Academic Load	The academic load of the students (for the term you specify) that you want to review.
Academic Level	The academic level (term begin) of the students (for the term you specify) that you want to review.
Degree Checkout Status	The degree checkout status of the students you want to review.
Expected Graduation Term	The expected graduation term of the students you want to review.
Student Group	The student group of the students you want to review.
Academic Standing	The academic standing of students (on the Term History page for the term you specify) that you want to *exclude* from the grade review. Add rows to specify more than one type of academic standing value that you want to exclude from the review.

Click Run to run this request. PeopleSoft Process Scheduler runs the Grade Review Process Driver process at user-defined intervals. If you selected the Generate Transcripts check box, you can view the transcripts online or print them when the process completes.

Understanding Self-Service Transcripts

PeopleSoft Student Administration and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Learner Services application you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

Students can request official and unofficial transcripts through the self-service pages described in the following sections.

Prerequisites

Before you enable self - service transcript requests (official or unofficial), you must define which transcript types you want to make available for official and unofficial transcript requests. Use the Self-Service Availability group box on the Transcript Type - Basic Data page to do this.

See Also

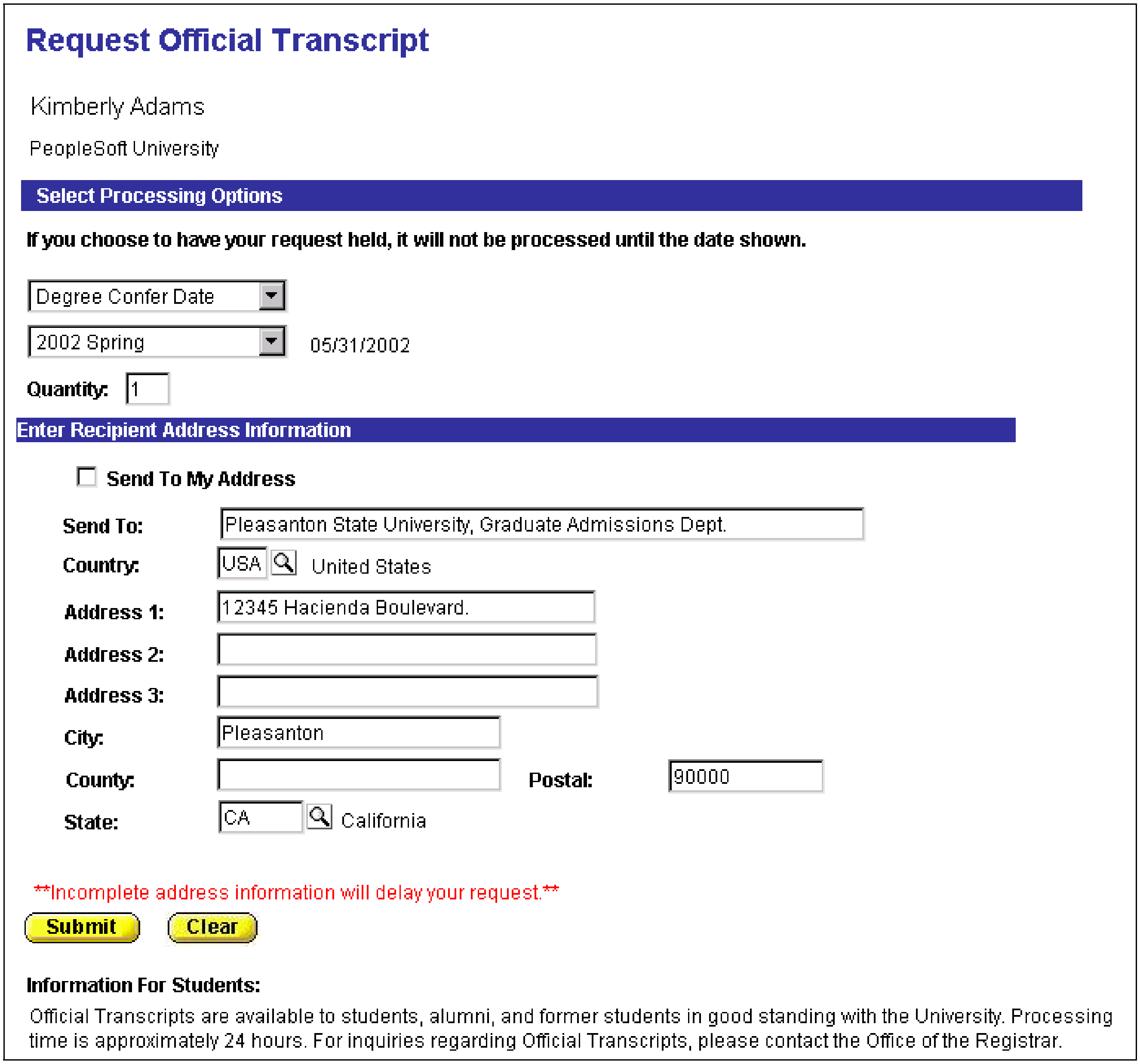
Chapter 13, “Setting Up Transcripts,” Defining Transcript Type Basic Data, page 265

Pages Used to Request a Self-Service Transcript

Page Name	Object Name	Navigation	Usage
Request Official Transcript	SS_TSCRPT_OFF	SA Self Service, Learner Services, Academics, Request Official Transcript	Students use this page to enter their request for an official transcript. Students enter their processing preferences, transcript quantity, and recipient address information. If students select the My Address check box, they can specify which of their system addresses they want to use.
Transcript Request Confirmation	SS_TSCRPT_OFF1	Automatically appears after the student submits their transcript request.	Students use the Transcript Request Confirmation page to confirm their request. Students can print this confirmation through their browser.
Unofficial Transcript	SS_ES_AARPT_TYPE2	SA Self Service, Learner Services, Academics, View Unofficial Transcript	Students use the Unofficial Transcript page to specify the institution and report type that they want to generate.
View Previously Requested Reports	SS_STUREQ_RSLT	• SA Self Service, Learner Services, Academics, View Degree Progress Report, View Previously Requested Reports • SA Self Service, Learner Services, Academics, View Unofficial Transcript, View Previously Requested Reports	Students use the View Previously Requested Reports page to view a summary of all unofficial reports they have generated.
Report Results	SS_REPORT_RESULT_A	• SA Self Service, Learner Services, Academics, View Degree Progress Report, Report Results • SA Self Service, Learner Services, Academics, View Unofficial Transcript, Report Results	Students use the Report Results page to view the results of their unofficial transcript report request.

Reviewing the Request Official Transcript Page

Access the Request Official Transcript page.

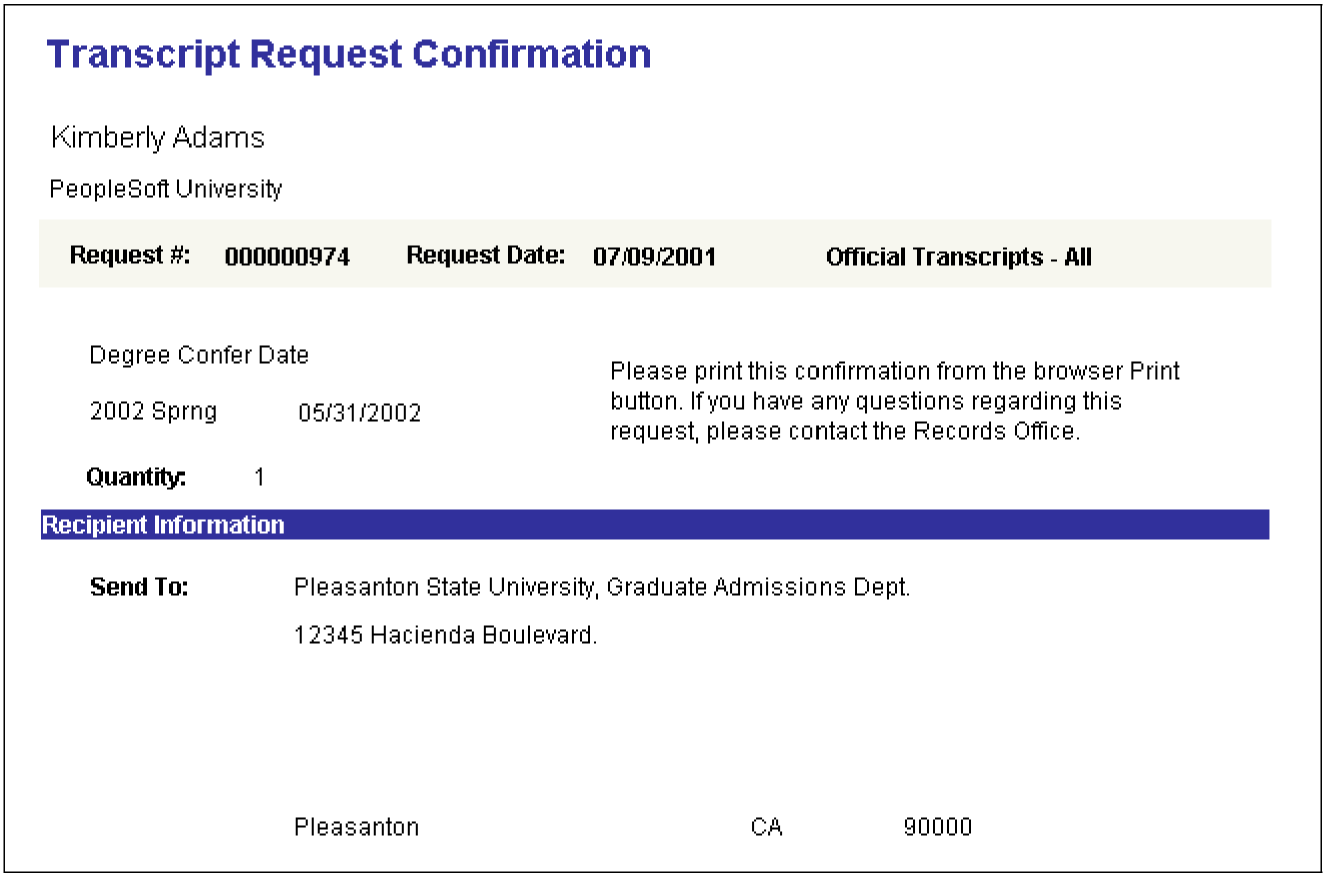


Request Official Transcript page

Students specify the details of their request and click the Submit button to submit their request, or the Clear button to start over.

Reviewing the Transcript Request Confirmation Page

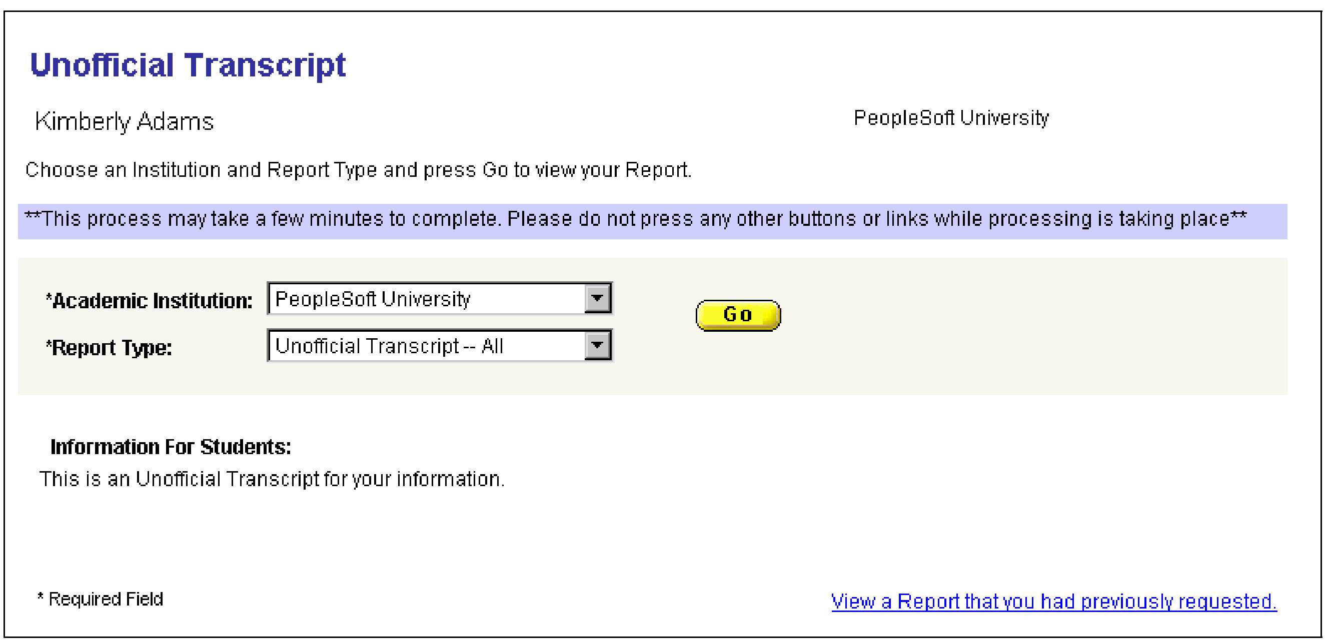
Access the Transcript Request Confirmation page.



Transcript Request Confirmation page

Reviewing the Unofficial Transcript Page

Access the Unofficial Transcript page.

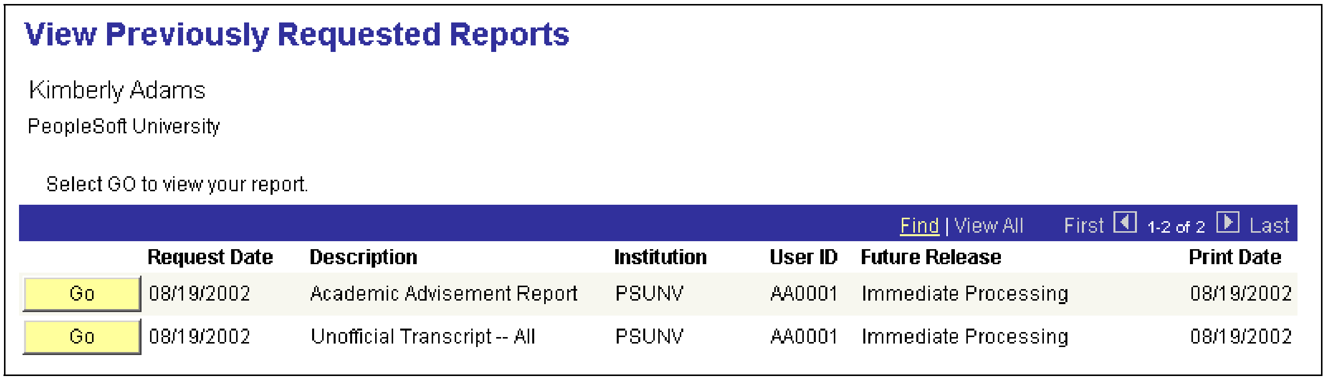


Unofficial Transcript page

Students enter their institution and report type, then click the Go button to process their report request. Students can also use the link on this page to access previously requested reports.

Reviewing the View Previously Requested Reports Page

Access the View Previously Requested Reports page.



View Previously Requested Reports page

Students click the Go button to access the Report Results page, where they can view their previously requested report.

Reviewing the Report Results Page

Access the Report results page.

Report Results

Return to Reports Page

Unofficial Transcript -- All

Print Date : 2001-07-06

Name : Adams,Kimberly

Student ID : AA0001

- - - - - **Academic Program History** - - - - -

Program : Liberal Arts Undergraduate

1900-01-01 : Psychology Major

1900-01-01 : Active in Program

- - - - - **Beginning of Undergraduate Record** - - - - -

1997 Fall

BIOLOGY	100	General Biology I	3.50	3.50	C	7.000
ENGLCOMP	100	English Composition I	3.00	3.00	B	9.000
HISTORY	120	American History	3.00	3.00	B	9.000
PSYCH	100	Intro to Psy	3.00	3.00	A	12.000
TERM GPA :	2.960	TERM TOTALS :	12.50	12.50		37.000

Good Standing

Report Results page

Purging Transcripts

This section discusses the pages used to purge transcript requests and transcripts.

Prerequisites

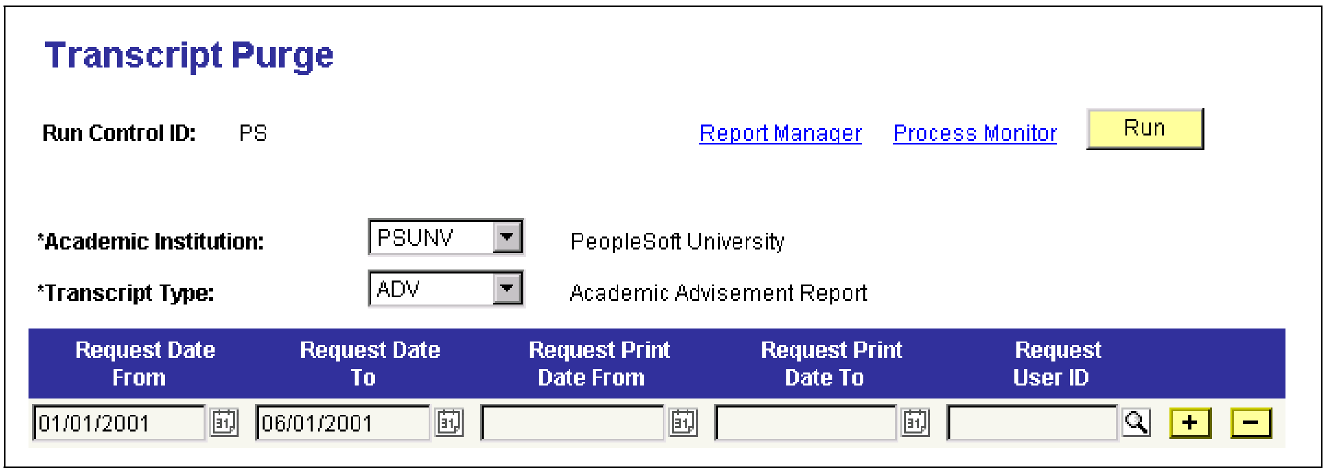
Before you can purge transcript requests and transcripts, you must first create transcript requests.

Pages Used to Purge Transcripts

Page Name	Object Name	Navigation	Usage
Transcript Purge	RUNCTL_SRTRPURG	Manage Student Records, Manage Academic Records, Process, Transcript Purge, Transcript Purge	Purge transcript requests, including transcript results, if any. The system purges all transcript requests within the parameters that you specify, except for those with the Freeze Record check box selected on the Request Header page.

Entering Transcript Purge Parameters

Access the Transcript Purge page.



Transcript Purge page.

Note. You can enter any or all of the parameters on the page to select the appropriate transcript requests to purge. The only fields that the system requires are Academic Institution and Transcript Type.

Academic Institution
The institution for which you want to purge transcripts. This value determines the availability of transcript types in the Transcript Type field.

Transcript Type
The transcript type for which you want to purge transcripts.

Request Date From and **Request Date To**
Enter values in the Request Date From and Request Date To fields in order to specify purge parameters in more detail. The system purges transcript requests created on and including these dates. The request date is the date that the transcript request number is created.

Request Print Date From and **Request Print Date To**
Enter values in the Request Print Date From and Request Print Date To fields in order to specify purge parameters in more detail. The system purges transcript requests printed on and including these dates. The request print date is not a literal definition. The request print date refers to the date on which the transcript is generated and available for printing. For online transcript requests, this is the value in the Print Date field on the Request Header page. For batch transcript requests, this is the date on which the transcript is generated.

Request User ID Select an ID from your user ID list. The system purges transcript requests requested or printed by this user.

Click Run to run this request. PeopleSoft Process Scheduler runs the Transcript Purge process at user-defined intervals.

CHAPTER 36

Consolidating and Reporting Academic Statistics

This chapter provides overviews of consolidating and reporting academic statistics, the consolidated statistics processes, and the Consolidate Academic Statistics process (SRPCCONP) calculations, and discusses how to:

- Perform academic statistics consolidation.
- View consolidated academic statistics for individual students.
- View consolidated academic statistics for groups of students.
- Produce veteran reports.
- Produce Nation Student Clearinghouse (NSLC) extracts.
- Build Online Analytical Processing (OLAP) cubes for records analysis.

Understanding Consolidating and Reporting Academic Statistics

With the Consolidate Academic Statistics process (SRPCCONP), you can capture demographic and statistical information about your students, reporting these students under one primary academic career and program for a statistical period of time. If a student is active in multiple academic careers or programs within one or more terms of an academic statistics period, the process combines the student's academic career, program, level, and load information, based on the student's academic career and program that have the lowest primacy number. Your institution can report each student under one academic career and program for a statistical period of time and have the multiple academic level, load, and other statistics consolidated. You can then use these consolidated academic statistics to meet reporting requirements—such as Integrated Postsecondary Education Data System (IPEDS), National Student Clearinghouse (NSLC), and veteran's reporting.

After your institution completes the prerequisite setup for consolidating and reporting academic statistics, you are ready to capture and consolidate academic statistics for students who are active in terms at the academic institution for a given academic statistics period. You can, through the Consolidated Statistics page, run three COBOL/SQL processes. These processes are the following:

- Take Term Statistics Snapshot (SRPCCONA)
- Recurring Term Snapshot (SRPCCONU)
- Consolidate Academic Statistics (SRPCCONP)

Important! To gather statistics that reflect different times of the year, you must run the Recurring Term Snapshot process (SRPCCONU) and the Consolidate Academic Statistics process (SRPCCONP) on a regular basis because the statistics themselves are based on the run date, not on the snapshot date. The processes use the snapshot date to locate the valid academic career and term combinations to include in the calculations.

After you have run the Consolidate Academic Statistics process (SRPCCONP) and are satisfied with the statistical results, you can then create reports based on the calculations found in the consolidated statistics table. PeopleSoft provide several reporting features—such as veterans, NSLC, and OLAP for PeopleSoft Student Records—that use the Consolidate Academic Statistics process results. Or you can create other reports to meet the needs of your institution. This section discusses the delivered reporting features.

See Also

Chapter 14, "Preparing to Consolidate and Report Academic Statistics," page 283

Understanding Consolidated Statistics Processes

Before you run any of the consolidated statistics processes, it is important to understand when to use each process and how each process functions. This section summarizes each process, describes the common functionality shared between the processes, and outlines how each application process functions.

Take Term Statistics Snapshot Process

The Take Term Statistics Snapshot process (SRPCCONA) takes a term snapshot of every academic career and term combination listed in the grid in the lower portion of the Consolidated Statistics process page, where the snapshot date is less than or equal to the system date. The process considers as valid only the academic career and term combinations listed on the Academic Statistics Period page for the academic statistics period for which you run the process.

Run the process only when the consolidation trigger for the given academic statistics period is set to *Consolidation Date.* With such a consolidation trigger, this process is a precursor to running the Consolidate Academic Statistics process (SRPCCONP).

The process stores results in a temporary holding table (PS_STDNT_CARTRM_PD) for future use. This table has no corresponding page in which to view the stored data. There may be several rows of information in this table for one student per academic statistics period, depending on the academic career, term, and snapshot date combination. For example, in the Academic Statistics Period page, you might have set the following snapshot dates:

Academic Career	Term	Snapshot Date
BUSN	0330 (fall semester 1998)	09/20/98
BUSN	0350 (spring semester 1999)	02/01/98

Academic Career	Term	Snapshot Date
LAW	0332 (fall quarter 1998)	09/15/98
LAW	0334 (spring quarter 1999)	01/30/99

Suppose that student A is in both the BUSN and LAW academic careers. In this scenario, after all term snapshots have been run, there will be four rows for student A in the temporary holding table PS_STDNT_CARTRM_PD.

Whenever you select *Consolidation Date* as your consolidation trigger for the academic statistics period, you must run two processes—the Term Snapshot process and the Consolidate Academic Statistics process. With such a consolidation trigger, the Consolidate Academic Statistics process consolidates all of a student's data that is found in the temporary holding table for a specific academic statistics period, calculating only one row of data for each student within an academic statistics period. The Consolidate Academic Statistics process writes these results to the consolidated statistics table (PS_STDNT_CONS_STAT). You can view many of the results from the Consolidate Academic Statistics process in the Student Consolidated Statistics component.

Recurring Term Snapshot Process

The Recurring Term Snapshot process (SRPCCONU) functions like the Take Term Statistics Snapshot process (SRPCCONA), except that you set up the process, through PeopleSoft Process Scheduler, to run regularly with a PeopleTools database agent utility. The Recurring Term Snapshot process searches for and takes term snapshots for an academic statistics period. The process takes a snapshot when the system date is equal to the term snapshot date as defined for the academic statistics period on the Academic Statistics Period page.

Consolidate Academic Statistics Process

The Consolidate Academic Statistics process (SRPCCONP) combines all of a student's valid academic statistics into one consolidated record.

You must run the Consolidate Academic Statistics process for every academic statistics period, regardless of the consolidation trigger for the academic statistics period. For academic statistics period where the consolidation trigger is set to *Consolidation Date,* you must first run either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) for all academic career, term, and snapshot date combinations of an academic statistics period before running the Consolidate Academic Statistics process. For academic statistics periods where the consolidate trigger is set to *As of Date* or *As of Today,* you need only run the Consolidate Academic Statistics process. The Consolidate Academic Statistics process uses the SRPCCONS program to calculate results, which the system then stores in the PS_STDNT_CONS_STAT table.

Regardless of the consolidation trigger for your academic statistics period, when a student is active in more than one academic career and academic program during the same academic statistics period, the Consolidate Academic Statistics process locates the student's primary academic career and program in two ways: by the academic careers and programs in which the student is active, and by the primacy number on the academic career and program. Because many federal and state reports require that you count students under one academic career and program even if the student is actively enrolled in more than one, the process combines all of the academic level, load, career, and program information for each student, based upon the primacy number you give to the academic career and program. The process reports the student based upon the student's academic career and program that has the lowest primacy number at the institution.

After you run the Consolidated Academic Statistics process, you have a table full of the consolidated statistics for your reporting requirements such as veterans, IPEDS, and NSLC. Use the Student Consolidated Stats (student consolidated statistics) component or the Mass Consolidated Statistics component to view and adjust most of the results.

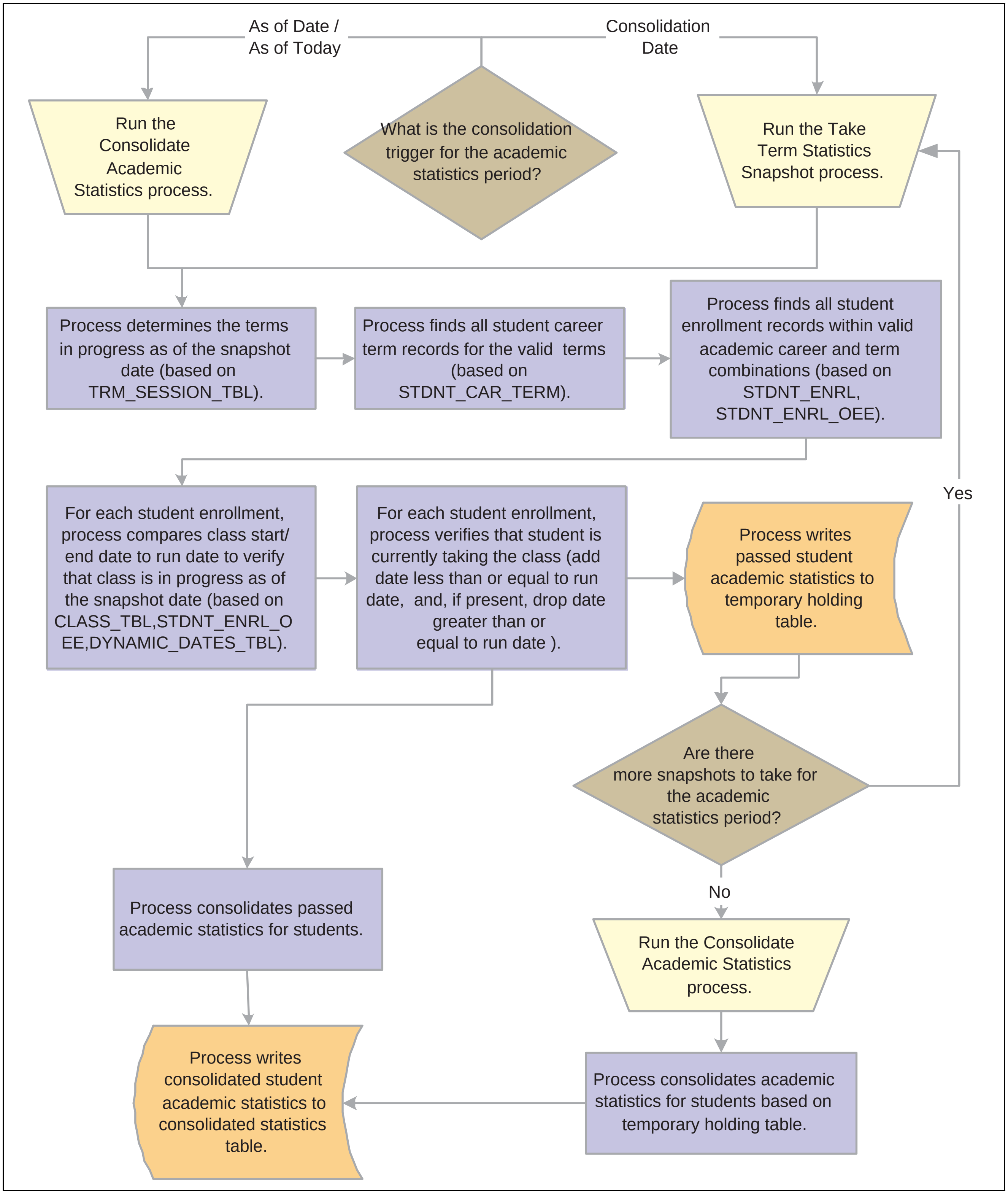
Important! PeopleSoft recommends that you run the Consolidate Academic Statistics process at night, during the weekend, or at any other time with reduced demands on the system.

Common Functionality Shared Between Processes

Before you run any of the consolidated statistics processes, it is important to understand how the processes locate which student data to include in their results. First, the processes locate the valid academic career and term combinations that are in-progress as of the snapshot date. Once the processes locate the valid academic career and term combinations, they gather all of the career-term records for students active in these academic career and term combinations, excluding any student who has completed their degree, except within the student’s degree completion term. After the processes gather the applicable student career-term records, they further gather these students’ enrollment records and compare the start and end dates for all classes in which the student is actively enrolled to the snapshot date to determine if a student’s class units should count towards her or his academic level and load calculation. For example, the process excludes a student’s class units if the student has enrolled in the class for a future session. This structure assists nonterm-based institutions in identifying a student’s status at any given point in time, such as a student’s primary academic program, primary academic career, term, academic level, academic load, and current and cumulative career-term statistics.

Flow Chart of Consolidated Statistics Processes

The following diagram illustrates when to run the Consolidate Academic Statistics process (SRPCCONP) and the Take Term Statistics Snapshot process (SRPCCONA) and, once initiated, how these processes function.



Illustrating flow of consolidated academic statistics processes

Understanding Consolidate Academic Statistics Process Calculations

After you run the Consolidate Academic Statistics process (SRPCCONP), the system stores your results in the consolidated statistics table (PS_STDNT_CONS_STAT), giving you a table full of the consolidated statistics for students that you can then use for reporting. You can use the Student Consolidated Stats and the Mass Consolidated Statistics components to view and edit many of the process calculations stored in the consolidated statistics table.

Use the following table to view the logic behind how the SRPCCONS program, which is part of the Consolidate Academic Statistics process (SRPCCONP), calculates each student's consolidated academic statistics. The Consolidate Academic Statistics process stores these vital statistics into one table—the Consolidated Statistics table (PS_STDNT_CONS_STAT)—which you can access for a specific student through the Student Consolidated Stats component, for a group of students through the Mass Consolidated Statistics component, or through SQL select statements when you query the database. The table contains over a hundred data elements—only the most vital of these are available for inquiry online. PeopleSoft has decided which possible statistics the process includes based upon guidelines of federal reports such as NSLC, IPEDS, and IRS, and from feedback from our clients.

The table below describes each of the fields that you can view through either the Student Consolidated Stats component or the Mass Consolidated Statistics component, and all other fields found in the PS_STDNT_CONS_STAT table. All descriptions in the table are listed in the order in which they appear in the record definition:

Field	Logic
EMPLID (EmplID)	Populated from the corresponding field on the STDNT_CAR_TERM record for the student's primary academic program.
INSTITUTION (Academic Institution)	Originated from input through the Consolidated Statistics process page.
ACAD_STATS_PERIOD (Academic Statistics Period)	Originated from input through the Consolidated Statistics process page.
CONS_STATUS (Consolidation Status)	Result of the Consolidate Academic Statistics process (SRPCCONS). If successful, then the program logic sets status to *S* (success).

Field	Logic
ACAD_CAREER (Academic Career)	Populated from the corresponding field on the STDNT_CAR_TERM record. If the academic statistics period has, for its trigger, *As of Date* or*As of Today* (system date), then that date triggers the cut-off for the admit term. If the academic statistics period has, for its trigger, *Consolidation Date,* then that date triggers the cut off for the admit term (same as the *As of Date* or *As of Today* trigger). If more than one academic career passes these criteria, then the program logic locates the active academic career. If two academic careers are active on the same date, then the program logic looks at the primacy number. The lowest number takes precedence. If the academic careers have the same primacy number, then the program logic will compare the effective dates (EFFDT). The later date takes precedence.
STRM (Term)	Populated with values from the corresponding field on the STDNT_CAR_TERM record. If the academic statistics period has, for its trigger, *As of Date* or*As of Today,* then the program logic reports the term from the student's primary academic program. If the academic statistics period has, for its trigger, *Consolidation Date,* then the program logic reports the term from the student's primary academic program in relation to the consolidation as of date. For example, if you take snapshots for terms 0330, 0350, and 0370 but your consolidation as of date falls within term 0350, then the program logic reports term 0350.
WITHDRAW_CODE (Withdrawal/Cancel)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program.
WITHDRAW_REASON (Withdrawal/Cancel Reason)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program.
WITHDRAW_DATE (Withdrawal/Cancel Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program.

Field	Logic
LAST_DATE_ATTENDED (Last Date of Attendance)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program.
STDNT_CAR_NBR (Student Career Number)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.
ACAD_PROG_PRIMARY (Primary Academic Program)	Calculated from the corresponding field on the STDNT_CAR_TERM record. If a student has two or more active academic programs, the program logic calculates the primary academic program according to the primacy value of the academic programs. Tit is the calculated academic program that will be reported.
ACAD_LOAD_APPR (Approved Academic Load)	Populated from the corresponding field on the STDNT_CAR_TERM record.
ACADEMIC_LOAD (Academic Load)	Computed by the SRPCRULE/SRPCLOAD process based on units in progress and using academic load rules according to the academic statistics period. See the logic description for the OVRD_ACADEMIC_ LOAD field.
OVRD_ACADEMIC_LOAD (Override Academic Load)	The system sets this field value to *N,* indicating that the Academic Load field (ACADEMIC_LOAD) contains the value of the calculated academic load (ACADEMIC_LOAD_CL). You can override the calculated academic load (ACADEMIC_LOAD_CL) by selecting the Override Academic Load check box (OVRD_ACADEMIC_LOAD), on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Academic Load field (ACADMEIC_LOAD). Selecting this check box sets the OVRD_ACADEMIC_LOAD field value to *Y.*
ACADEMIC_LOAD_CL Academic Load Calculated)	Computed by the SRPCRULE/SRPCLOAD process, based on units in progress and using academic load rules according to the academic statistics period. See the logic description for the OVRD_ACADEMIC_ LOAD field.
FA_LOAD (Financial Aid Load)	Computed by SRPCRULE/SRPCLOAD.

Field	Logic
ACADEMIC_LOAD_NSLC (NSLC Academic Load)	Calculated from units in progress and using NSLC academic load rules (PS_ACAD_LOAD2_TBL) according to the academic statistics period. You can override the calculated result by selecting the Override Academic Load check box on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for this field.
ACAD_LOAD_NSLC_CL NSLC Academic Load Calculated)	Calculated from units in progress and using NSLC academic load rules (PS_ACAD_LOAD2_TBL) according to the academic statistics period.
ACAD_LEVEL_PROJ (Academic Level - Projected)	Computed by SRPCRULE/SRPCLVL.
ACAD_LEVEL_PROJ_CL (Academic Level Proj Calculated)	Computed by SRPCRULE/SRPCLVL.
ACAD_LEVEL_BOT (Academic Level - Term Start)	Computed by the SRPCRULE/SRPCLVL process based on cumulative units and using the academic level rules according to the Academic Level Table page.
ACAD_LEVEL_BOT_CL (Academic Level BOT Calculated)	Computed by the SRPCRULE/SRPCLVL process based on cumulative units and using the academic level rules according to the Academic Level Table page.
ACAD_LEVEL_EOT (Academic Level - Term End)	Computed by SRPCRULE/SRPCLVL. See the logic description for the OVRD_ACAD_LVL_ALL field.
ACAD_LEVEL_EOT_CL (Academic Level EOT Calculated)	Computed by SRPCRULE/SRPCLVL. See the logic description for the OVRD_ACAD_LVL_ALL field.

Field	Logic
ACAD_LEVEL_IPEDS (IPEDS Academic Level)	Calculated from cumulative units at the end of the term or using academic level and IPEDS academic level mapping according to the Level/Load Rules Table page. You can override the calculated result by selecting the Override All Academic Levels check box, on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for this field. See the logic description for the OVRD_ACAD_LVL_ALL field.
ACAD_LEVEL_IPED_CL (IPEDS Academic Level Calculated)	Calculated from cumulative units and using academic level and IPEDS academic level mapping according to the Level/Load Rules Table page. See the logic description for the OVRD_ACAD_LVL_ALL field.
NSLDS_LOAN_YEAR (NSLDS Loan Year)	Computed by SRPCRULE/SRPCLVL.
OVRD_ACAD_LVL_PROJ (Override Projected Level)	Populated from the corresponding field on the STDNT_CAR_TERM record.
OVRD_ACAD_LVL_ALL (Override All Academic Levels)	Populated from the corresponding field on the STDNT_CAR_TERM record. The system sets this field value to *N,* indicating that the IPEDS Academic Level field (ACAD_LEVEL_IPEDS) and the Academic Level - Term End field (ACAD_LEVEL_EOT) contain the value of the respective calculated academic levels (ACAD_LEVEL_IPED_CL and ACAD_LEVEL_EOT_CL). You can override the calculated academic levels (ACAD_LEVEL_IPED_CL) and (ACAD_LEVEL_EOT_CL) by selecting the Override Units For Progress check box (OVRD_ACAD_LVL_ALL), on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the IPEDS Academic Level field (ACAD_LEVEL_IPEDS) and Academic Level - Term End field (ACAD_LEVEL_EOT). Selecting this check box sets the OVRD_ACAD_LVL_ALL field value to *Y.*

Field	Logic
ELIG_TO_ENROLL (Eligible to Enroll)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TAKEN_PRGRSS (Units Taken for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_UNT_TAKEN_PRG field.
UNT_TAKEN_PRGRS_CL (Calculated Progress Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_UNT_TAKEN_PRG field.
OVRD_UNT_TAKEN_PRG (Override Units for Progress)	The system sets this field value to *N,* indicating that the Units Taken For Progress field (UNT_TAKEN_PRGRSS) contains the value of the calculated progress units (UNT_TAKEN_PRGRS_CL). You can override the calculated progress units (UNT_TAKEN_PRGRS_CL) by selecting the Override Units For Progress check box (OVRD_UNT_TAKEN_PRG) on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Units Taken for Progress field (UNT_TAKEN_PRGRSS). Selecting this check box sets the OVRD_UNT_TAKEN_PRG field value to *Y.*
UNT_PASSD_PRGRSS (Units Passed for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TAKEN_GPA (Units Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_PASSD_GPA (Units Passed Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TAKEN_NOGPA (Units Taken Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_PASSD_NOGPA (Units Passed Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).

Field	Logic
UNT_INPROG_GPA (Units In Progress - GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_INPROG_NOGPA (Units In Progress - Not for GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
GRADE_POINTS (Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_AUDIT (Units Audited)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TRNSFR ((Units Transferred)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_TAKEN_GPA (Transfer Taken for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_TAKEN_NOGPA (Transfer Taken Not for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_PASSED_GPA (Transfer Passed for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_PASSED_NOGPA (Transfer Passed Not for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_GRADE_POINTS (Transfer Grade Points)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TEST_CREDIT (Units From Test Credit)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_OTHER (Units From Other Credit)	Populated from the corresponding field on the STDNT_CAR_TERM record.

Field	Logic
UNT_TAKEN_FA (Fin Aid Progress Units Taken)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_PASSD_FA Fin Aid Progress Units Passed)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TAKEN_FA_GPA (FA Units Taken Toward GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
GRADE_POINTS_FA Financial Aid Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TERM_TOT (Total Term Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
RESET_CUM_STATS (Reset Cum Stats at Term Start)	Currently not in use.
TOT_TAKEN_PRGRSS (Total Taken for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_PRGRSS Total Passed for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_GPA (Total Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_GPA (Total Passed Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_NOGPA (Total Taken Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_NOGPA (Total Passed Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).

Field	Logic
TOT_INPROG_GPA (Total In Progress - GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_INPROG_NOGPA (Total In Progress - Not for GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_AUDIT (Total Audited)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TRNSFR (Total Transferred)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TEST_CREDIT (Total From Test Credit)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_OTHER (Total From Other Credit)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_CUMULATIVE (Total Cumulative Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_TOT_CUM field.
TOT_CUMULATIVE_CL (Total Cumulative Units Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_TOT_CUM field.
OVRD_TOT_CUM (Override Total Cumulative Unit)	The system sets this field value to *N,* indicating that the Total Cumulative Units field (TOT_CUMULATIVE) contains the value of the calculated total cumulative units (TOT_CUMULATIVE_CL). You can override the calculated total cumulative units (TOT_CUMULATIVE_CL) by selecting the Override Total Cumulative Unit check box (OVRD_TOT_CUM), on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Total Cumulative Units field (TOT_CUMULATIVE). Selecting this check box sets the OVRD_TOT_CUM field value to *Y.*

Field	Logic
TOT_GRADE_POINTS (Total Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_FA (Total Fin Aid Units Taken)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_FA (Total Fin Aid Units Passed)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_FA_GPA (Total Fin Aid Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_GRD_POINTS_FA (Total Fin Aid Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
FORM_OF_STUDY (Form of Study)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. See the logic description for the OVRD_FORM_OF_STUDY field.
FORM_OF_STUDY_PD (Form of Study for Period)	Used in the United States, specifically for IRS reporting in a delivered report in the database. When you have an academic statistics period that consolidates several terms: If the latest term form of study equals *Enrollment* and units equals *0,* then the program logic populates FORM_OF_STUDY_PD with the *prior* Term's form of study value. If the latest term form of study equals *Enrollment* and units are greater than *0,* then the program logic populates FORM_OF_STUDY_PD with the *latest* term's form of study value.
FORM_OF_STUDY_CL (Form of Study Calculated)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. See the logic description for the OVRD_FORM_OF_STUDY field.

Field	Logic
OVRD_FORM_OF_STUDY (Override Form of Study)	The system sets this field value to *N,* indicating that the Form of Study field (FORM_OF_STUDY) contains the value of the calculated form of study (FORM_OF_STUDY_CL). You can override the calculated form of study (FORM_OF_STUDY_CL) by selecting the Override Form of Study check box (OVRD_FORM_OF_STUDY), on the Mass Consolidated Statistics component or the Basic Data page in the Student Consolidated Stats component, then selecting a new value for Form of Study field (FORM_OF_STUDY). Selecting this check box sets the OVRD_FORM_OF_STUDY field value to *Y.*
TERM_TYPE (Term Type)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic career.
CLASS_RANK_NBR (Class Rank Nbr)	Populated from the corresponding field on the STDNT_CAR_TERM record.
CLASS_RANK_TOT (Class Rank Total)	Populated from the corresponding field on the STDNT_CAR_TERM record.
SEL_GROUP (Tuition Group)	Populated from the corresponding field on the STDNT_CAR_TERM record.
BILLING_CAREER (Billing Career)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic career and primary academic program.
UNIT_MULTIPLIER (Unit Multiplier)	Populated from the corresponding field on the STDNT_CAR_TERM record.
ACAD_YEAR (Academic Year)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic career and primary academic program.
CUR_RESIDENT_TERMS (Current In Residence Terms)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_RESIDENT_TERMS (Transfer In Residence Terms)	Populated from the corresponding field on the STDNT_CAR_TERM record.

Field	Logic
CUM_RESIDENT_TERMS (Cumulative In Residence Terms)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
REFUND_PCT (Refund Percentage)	Populated from the corresponding field on the STDNT_CAR_TERM record.
REFUND_SCHEME (Refund Scheme)	Populated from the corresponding field on the STDNT_CAR_TERM record.
PRO_RATA_ELIGIBLE (Pro-rata Eligible)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic career and primary academic program.
FULLY_ENRL_DT (Fully Enrolled Date)	Populated from the corresponding field on the STDNT_CAR_TERM record.
FULLY_GRADED_DT (Fully Graded Date)	Populated from the corresponding field on the STDNT_CAR_TERM record.
EXT_ORG_ID (External Org ID)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
COUNTRY (Country)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
STUDY_AGREEMENT (Study Agreement)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
START_DATE (Start Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.

Field	Logic
END_DATE (End Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
CUR_GPA (Current GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS). If the academic statistics period has, for its trigger, *As of Date* or *As of Today*, then the program logic uses the current GPA. If the academic statistics period has, for its trigger, *Consolidation Date,* the program logic uses the current term GPA. If a student is active in multiple programs and careers with different grading bases (for example, a 100-point scale and a 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_GPA field.
GPA_CL (GPA Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). If the academic statistics period has, for its trigger, *As of Date* or *As of Today*, then the program logic uses the current GPA. If the academic statistics period has, for its trigger, *Consolidation Date,* the program logic uses the current term GPA. If a student is active in multiple programs and careers with different grading bases (for example, a 100-point scale and a 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_GPA field.
OVRD_GPA (Override GPA)	The system sets this field value to *N,* indicating that the Current GPA field (CUR_GPA) contains the value of the calculated GPA (GPA_CL). You can override the calculated GPA (GPA_CL) by selecting the Override GPA check box (OVRD_GPA), on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Current GPA field (CUR_GPA). Selecting this check box sets the OVRD_GPA field value to *Y.*

Field	Logic
CUM_GPA (Cumulative GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS). Total grade points divided by total units. If the student is active in multiple programs and careers with different grading bases (for example, 100-point scale and 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_CUM_GPA field.
CUM_GPA_CL (Cumulative GPA Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). Total grade points divided by total units. If the student is active in multiple programs and careers with different grading bases (for example, 100-point scale and 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_CUM_GPA field.
OVRD_CUM_GPA (Override Cum GPA)	The system sets this field value to *N,* indicating that the Cumulative GPA field (CUM_GPA) contains the value of the calculated GPA (CUM_GPA_CL). You can override the calculated cumulative GPA (CUM_GPA_CL) by selecting the Override Cum GPA check box (OVRD_CUM_GPA), on Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Cumulative GPA field (CUM_GPA). Selecting this check box sets the OVRD_CUM_GPA field value to *Y.*
OVRD_TUIT_GROUP (Override Tuition Group)	Populated from the corresponding field on the STDNT_CAR_TERM record.
OVRD_WDRW_SCHED (Override Withdrawal Schedule)	Populated from the corresponding field on the STDNT_CAR_TERM record, based on the student's primary academic career and primary academic program.
TUITION_RES_TERMS (Tuition Residency)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TC_UNITS_ADJUST (TC Units Adjustment)	Populated from the corresponding field on the STDNT_CAR_TERM record.

Field	Logic
STDNT_COHORT_PRIM (Primary Student Cohort)	The Consolidate Academic Statistics process (SRPCCONS) reports one student attribute only for cohort processing. Define student attributes and their valid values on the Student Attributes Table page. Define the student attribute for cohort reporting at your institution on the Institution 3 page. When you run the process, it calls, for each student, a routine to retrieve the student's most primary student attribute value for the specific student attribute for cohort value that you define on the Institution 3 page. Assign student attributes and values to students on the Student Attributes page of the Student Program/Plan component.
ETHNIC_GROUP_SR (Ethnic Group)	Populated from the corresponding field on the PERSONAL_DATA record.
AGE_CATEGORY_SR (Age Category)	Populated from the corresponding field on the PERSONAL_DATA record. Age categories are defined per IPEDS rules. The program logic calculates age by using a student's birth date from personal data (based on system date) and comparing their birth date to the as of date, as of today date (system date), or consolidation as of date.
DEGREE (Degree)	Currently not in use.
EXP_GRAD_TERM (Expected Graduation Term)	Populated from corresponding field on the ACAD_PROG record, based on the student's primary academic program.
COMPLETION_TERM (Completion Term)	Populated from the corresponding field on the ACAD_PLAN record, based on the student's primary academic program.
DEGR_CONFER_DT (Confer Date)	Currently not in use.
ENRL_STAT_CHG_DT (Enrollment Status Change Date)	Currently not in use.
ACAD_PROG_MAIN (Academic Program)	Populated with the student's primary academic program (ACAD_PROG) within the student's primary academic career, based on the STDNT_CAR_TERM record.

Field	Logic
STDNT_CAR_NBR_MAIN (Student Career Number)	Populated with the student career number (STDNT_CAR_NBR), based on the student's primary academic career and primary academic program as found on the STDNT_CAR_TERM record.
ACAD_PLAN (Academic Plan)	Calculated from the corresponding field on the ACAD_PLAN record, based on the student's calculated primary academic program.
ACAD_SUB_PLAN (Academic Sub-plan)	Populated from the corresponding field on the ACAD_SUBPLAN record, based on the student's primary academic program.
EXTRA_ACTIVITY (Extracurricular Activity)	Populated from the corresponding field on the EXTRACUR_ACTVTY record. Primacy is taken into consideration by joining PS_EXTR_ACTVTY_TBL on common keys.
SF_1098_GRAD_FLG (1098 Grad Flag)	Currently not in use.
SF_1098_HLFTME_FLG (1098 half Time Flag)	Currently not in use.
CORRECTION_STATUS (Correction Status)	Currently not in use.
SF_CORRECTION_DTTM (Correction Date Time)	Currently not in use.
SF_OVERRIDE_GRAD (Override Grad Flag)	Currently not in use.
SF_OVERRIDE_HALF (Override Half Flag)	Currently not in use.
SF_ORIGINAL_SENTDT (Original Sent Date)	Currently not in use.

Field	Logic
SF_ORIGINAL_PRT_DT (Original Print Date)	Currently not in use.
ATHLETIC_AID (Athletic Aid)	Populated from FIN_AID_TYPE field found on the financial aid record ITEM_TYPE_FA. If the FIN_AID_TYPE value equals *A*(athletic), then the program sets the ATHLETIC_AID flag for consolidated statistics to *Y* (yes). You can override this value through the Athletic Aid check box on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component.
PROG_STATUS (Program Status)	This is the student's status within her or his primary academic program.
MULTI_ACAD_CAREER (Multiple Academic Career)	The program logic sets this flag to *Y* (yes) if the program is consolidating multiple careers and programs for a student regardless of a student's enrollment status. You can override this value through the Multiple Academic Career check box on the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component.
FA_UNIT_WARNING (Excluded FA eligible Term Warn)	SRPCCONS currently does not calculate the value for the FA_UNIT_WARNING flag. The program logic sets this field value to *N* (no).
CAMPUS (Campus)	Populated from the corresponding field on the ACAD_PROG record, based on the student's primary academic program.
LEVEL_LOAD_RULE (Level Load Rule)	The academic level and load rule that the SRPCCONS process uses to calculate the student's academic level and academic load.
OPRID (Operator ID)	Populated from the corresponding field on the run control table PS_RUN_CNTL_CONS, based on the user who saved the Consolidated Statistics process page.

Field	Logic
LASTNAME_RPTD_NSLC (Last name Reported NSLC)	Populated from input through the Consolidated Statistics process page provided that a value was entered into the Prev Stat NSLC (pervious statistics NSLC) field on the page. The program will use the EMPLID, INSTITUTION, and ACAD_STATS_PERIOD to pull up the STDNT_CONS_STAT record from the previous NSLC run and pull the data from the record. STDNT_CONS_STAT record will have the Last Name field populated when SRNSLCEX.SQR is run *(Manage Academic Records, Reports, NSLC).*
SSN_RPTD_NSLC (SSN Reported NSLC)	Populated from input through the Consolidated Statistics process page provided that a value was entered into the Prev Stat NSLC field on the page. The program will use the EMPLID, INSTITUTION, and ACAD_STATS_PERIOD to pull up the STDNT_CONS_STAT record from the previous NSLC run and pull the data from the record. STDNT_CONS_STAT record will have the SSN field populated when SRNSLCEX.SQR is run *(Manage Academic Records, Reports, NSLC).*
PREV_STATSPER_NSLC (Prev Acad Stats Period NSLC)	Originated from data on the Consolidated Statistics process page when the process is run.

Performing Academic Statistics Consolidation

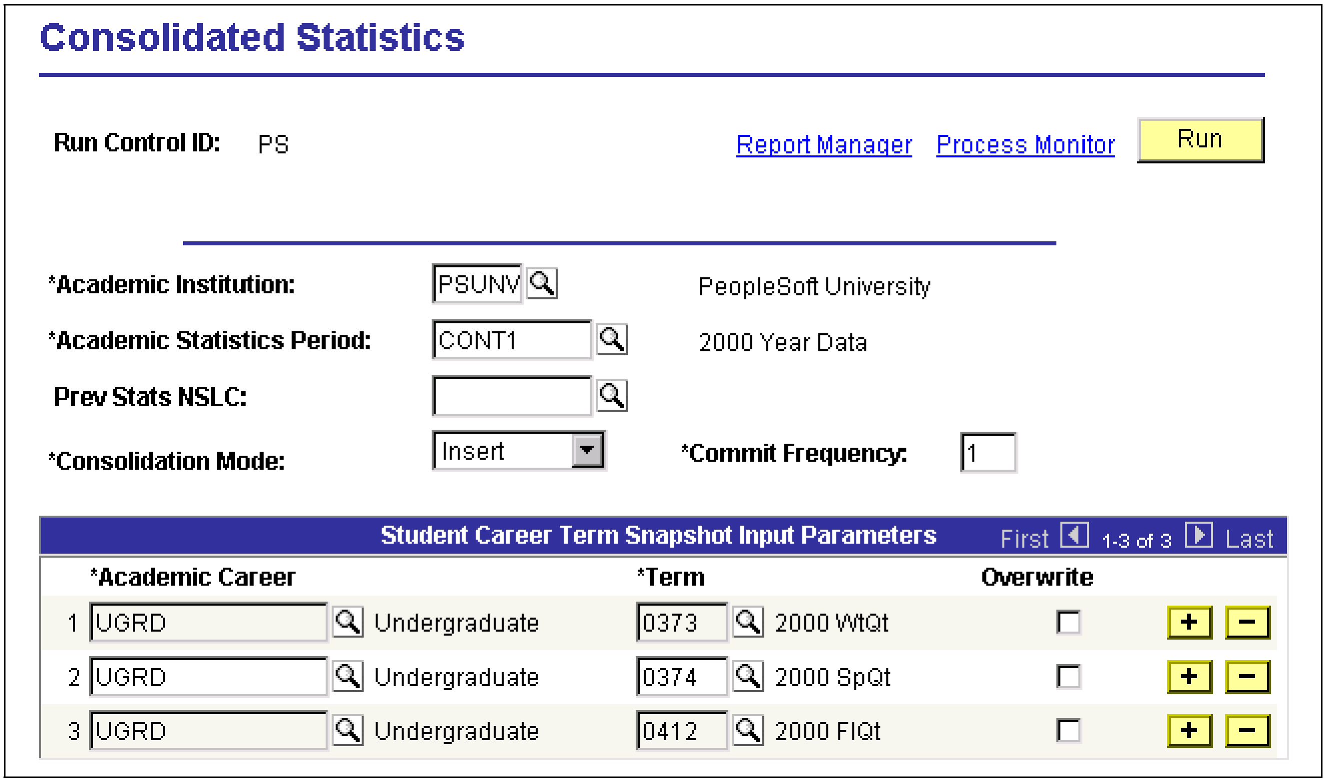
This section discusses how to consolidate academic statistics.

Page Used to Perform Academic Statistics Consolidation

Page Name	Object Name	Navigation	Usage
Consolidated Statistics	RUNCTL_CONS_STATS	Manage Student Records, Manage Academic Records, Process, Consolidate Statistics	Consolidate students' academic statistics for an academic statistics period.

Consolidating Academic Statistics

Access the Consolidated Statistics page.



Consolidated Statistics page

If the academic statistics period has *Consolidation Date* for its consolidation trigger, you must first run either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) for all academic career and term combinations defined within the academic statistics period. Then you must run the Consolidate Academic Statistics process (SRPCCONP). If the academic statistics period has *As of Date* or *As of Today* as its consolidation trigger, you need run only the Consolidate Academic Statistics process.

Academic Institution
Select the academic institution that contains the academic statistics period for which you want to run the process.

Academic Statistics Period
Select the academic statistics period for which you want to run the process.

Prev Stats NSLC (previous statistics National Student Clearinghouse)
Select the academic statistics period used as the source for the previous NSLC Extract report that your institution submitted to the NSLC within the current reporting period.

The Prev Stats NSLC field enables your institution to report enrollment status changes to the NSLC throughout a reporting period so that student loan lenders know when a student's enrollment status declines. The field enables the Consolidate Academic Statistics process to perform a comparison of a student's current enrollment status to that which was previously reported to the NSLC within the same reporting period. The current report thus includes only the key differences between it and the previous report.

Use the Prev Stats NSLC field *only if* you have previously reported to the NSLC for the current reporting period or term. *Do not* use this field for a *first of term* submission to the NSLC.

Consolidation Mode

Select the consolidation mode to indicate how the process that you are running writes its results to the applicable table. The Take Term Statistics Snapshot and the Recurring Term Snapshot processes write results to a temporary holding table (PS_STDNT_CARTRM_PD). Each student has only one row for an academic career, term, and snapshot date combination. The Consolidate Academic Statistics process writes results to the consolidated statistics table (PS_STDNT_CONS_STAT). Each student has only one row for each academic institution and academic statistics period combination. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Select from the following choices.

Insert: Select this option to have the Take Term Statistics Snapshot process and the Recurring Term Snapshot process insert only new rows into the temporary holding table and leave untouched the rows in the table where students already have data for the academic career, term and snapshot date combination. Or, select this option to have the Consolidate Academic Statistics process insert only new rows into the consolidated statistics table and leave untouched the rows in the table where students already have data for the academic institution and the academic statistics period combination specified for this run of the process.

Overwrite: Select this option to have the Take Term Statistics Snapshot process and the Recurring Term Snapshot process delete all existing rows from the temporary holding table where students already have data for the academic career, term and snapshot date combination, *then* insert new rows into the table for students that have data for the academic career, term and snapshot date combination. Or, select this option to have the Consolidate Academic Statistics process delete all existing rows from the consolidated statistics table where students already have data for the academic institution and academic statistics period combination specified on this page, *then* insert new rows into the table for students that have data for the academic institution and academic statistics period combination.

Commit Frequency

The system sets the commit frequency to *1.* For other processes this is generally the best option. However, for these processes, PeopleSoft recommends that you set the commit frequency higher, such as *300,* for faster processing of the job due to the potentially large volume of records.

Academic Career

The system displays a grid on the lower portion of the page only if the *academic statistics period* that you select has a *Consolidation Date* as its consolidation trigger. To populate the temporary holding table when you run the Take Term Statistics Snapshot process and the Recurring Term Snapshot process, enter the academic career, term, and snapshot date combinations for which you want the process to create student records in the temporary holding table. The combinations must be valid ones that your institution has defined for this academic statistics period on the Academic Statistics Period page.

In this field, select the academic career for which you want the Take Term Statistics Snapshot process or the Recurring Term Snapshot process to create student records in the temporary holding table.

Term Select the term within the academic career for which you want the Take Term Statistics Snapshot process or the Recurring Term Snapshot process to create student records in the temporary holding table.

Overwrite Select to have the Take Term Statistics Snapshot process or the Recurring Term Snapshot process delete all existing rows from the temporary holding table (STDNT_CARTRM_PD), where students already have data for the academic career, term and snapshot date combination, *then* insert new rows into the table for students that have data for the academic career, term and snapshot date combination. Selecting this check box enables you to rerun the Take Term Statistics Snapshot process without retaining the values in the temporary holding table that were generated from a previous run of the process.

If you set the Consolidation Mode field for the academic statistics period to *Insert,* then select the Overwrite check box for an individual row, the process deletes and replaces data records in the temporary holding table that match the academic institution, academic statistics period, academic career, and term for that individual row.

Viewing Consolidated Academic Statistics for Individual Students

This section discusses how to use the Student Consolidated Stats component to view the results of the Consolidate Academic Statistics process (SRPCCONP) on a student-by-student basis for a specific academic statistics period. For example, perhaps a student has just enrolled in another class and you want to adjust this student's statistics to more accurately report them. The component divides the results into the following four categories:

- Basic data
- Statistics
- Withdrawal and external study information
- Demographic data

See Also

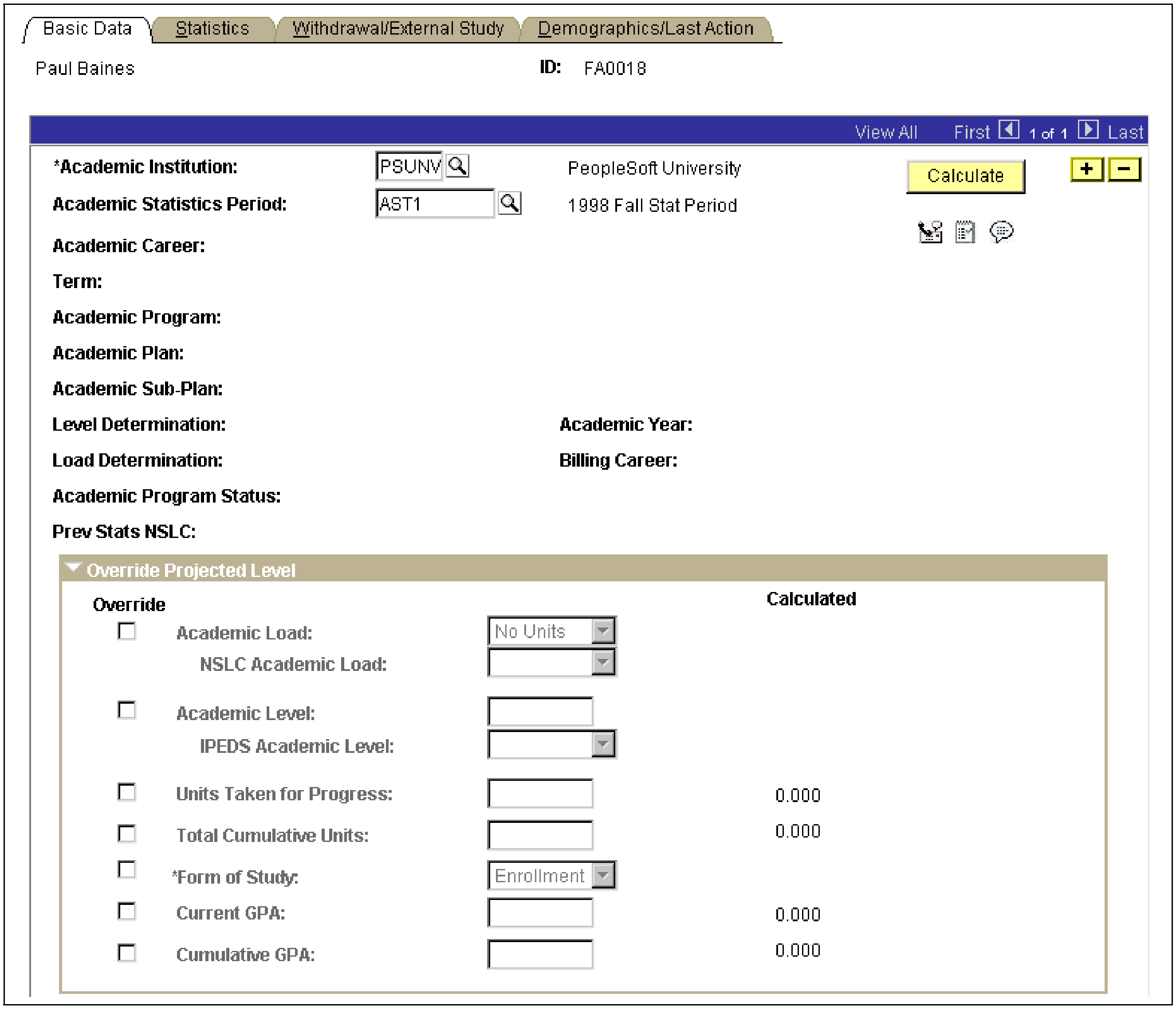
Chapter 36, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 826

Pages Used to View Consolidated Academic Statistics for Individual Students

Page Name	Object Name	Navigation	Usage
Student Consolidated Stats - Basic Data (student consolidated statistics - basic data)	STDNT_CONS_STATS0	Manage Student Records, Manage Academic Records, Use, Student Consolidated Stats, Basic Data	View basic data about a student's consolidated academic statistics for an academic statistics period, such as the student's primary academic career, term, primary academic program, academic level and load determination, and academic program status. Also use this page to view the calculated results of the Consolidate Academic Statistics process (SRPCCONP) for the student's academic load, academic level, units, form of study, and GPA. If necessary, override the calculated results.
Student Consolidated Stats - Statistics (student consolidated statistics - statistics)	STDNT_CONS_STATS1	Manage Student Records, Manage Academic Records, Use, Student Consolidated Stats, Statistics	View a student's consolidated term statistics and cumulative statistics for an academic statistics period.
Withdrawal/External Study	STDNT_CONS_STATS3	Manage Student Records, Manage Academic Records, Use, Student Consolidated Stats, Withdrawal/External Study	View withdrawals and cancellations on a student-by-student basis for an academic statistics period. Also use this page to view consolidated external study programs that apply towards a student's academic career, such as study abroad.
Demographics/Last Action	STDNT_CONS_STATS6	Manage Student Records, Manage Academic Records, Use, Student Consolidated Stats, Demographics/Last Action	View a student's age category, ethnic group, primary cohort and latest consolidation status for the academic statistics period.

Viewing Basic Data

Access the Student Consolidated Stats - Basic Data page.



Student Consolidated Stats - Basic Data page

Academic Institution

Select the academic institution that contains the consolidated academic statistics of the student.

Academic Statistics Period

The page displays the student's consolidated academic statistics for each applicable academic statistics period that you have run.

Override Projected Level

Click the arrow on the left of the Override Projected Level group box title bar to display the calculated statistical results of the Consolidate Academic Statistics process (SRPCCONP) for various types of statistics. Select the Override check box next to each type of statistic to change the calculated results. The corresponding field becomes available. Enter the new value. The calculated results of the process itself always appear, unaltered on this page so that you can compare the original process calculation to your changes.

Calculate

If the academic statistics period for which you have calculated the student's consolidated academic statistics has *As of Date* or *As of Today* for its consolidation trigger, you can recalculate the student's consolidated statistics. Click this button to have the system rerun the Consolidate Academic Statistics process for this student's academic record in the academic institution and academic statistics period that you specify. If the academic statistics period has *Consolidate Date* for its consolidation trigger, then rerunning the Consolidate Academic Statistics process with the Calculate button has no bearing on the student's calculated results. This is because the process is retrieving statistics from the temporary holding table populated by either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) rather than retrieving data from the student's records. The only way to recalculate a student's academic statistics in such a case is to first retake the term snapshots through the Term Statistics Snapshot process or the Recurring Term Snapshot process.

Viewing Statistics

Access the Student Consolidated Stats - Statistics page.

Reset Cum Stats at Term Start (reset cumulative statistics at term start) — If this check box is selected, all statistics have been reset to zero at the start of the given term. If this check box is cleared, statistics have been accumulated from previous terms and added to the given term. This check box is set on the Cumulative Statistics page of the Term History component.

Viewing Withdrawal and External Study Information

Access the Withdrawal/External Study page.

The system displays the student's withdrawal and external study statistics for an academic statistics period based on the student's primary academic career, primary academic program, and last term within the academic statistics period.

Viewing Demographic Data

Access the Demographics/Last Action page.

Viewing Consolidated Academic Statistics for Groups of Students

This section discusses how to view the results of the Consolidate Academic Statistics process (SRPCCONP) for groups of students.

See Also

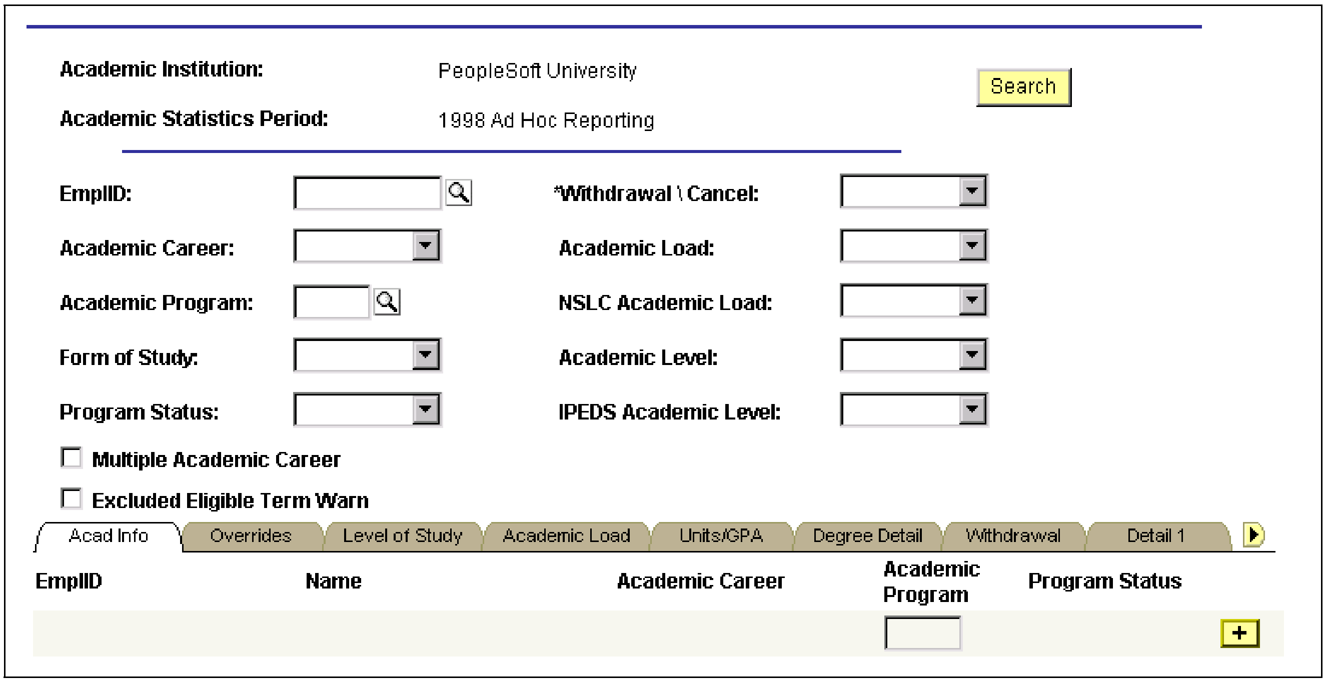
Chapter 36, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 826

Page Used to View Consolidated Academic Statistics for Groups of Students

Page Name	Object Name	Navigation	Usage
Mass Consolidated Statistics	STDNT_CONS_MASS0	Manage Student Records, Manage Academic Records, Use, Mass Consolidated Statistics	Search for and view groups of students and update their consolidated academic statistics.

Viewing Mass Consolidated Academic Statistics

Access the Mass Consolidated Statistics page.



Mass Consolidated Statistics page

By searching for statistics on groups of students within an academic statistics period, you can easily override the results of the Consolidate Academic Statistics process for every student in the group. The system retrieves the consolidated academic statistics for the students that meet your selection criteria and displays these statistics in the grid in the lower portion of the component. For example, perhaps your institution had consolidated academic statistics yesterday for a particular academic statistics period but discovers today that a group of law students need to enroll in a new class. This changes their academic load. To correct the inconsistency in their academic statistics, you can use the Mass Consolidated Statistics component to override the academic load that the Consolidate Academic Statistics process calculated for the law students.

Searching for Statistics on Groups of Students

Select the search criteria to find and display consolidated academic statistics for a student or group of students within an academic statistics period.

Multiple Academic Career Select to have the system retrieve only those students who have multiple academic careers and also meet your search criteria.

Excluded Eligible Term Warn	Select to have the system retrieve only those students who meet your search criteria and also have been excluded from financial aid eligibility due to an insufficient number of units.
Search	Click to have the system retrieve and display the results meeting your selection criteria. The system pulls the statistics from the consolidated statistics table (PS_STDNT_CONS_STAT) and displays the results in the grid in the lower portion of the component. Click the tabs to move from one set of statistics to the next.

Viewing Statistics for Groups of Students

The system retrieves the statistics that meet your criteria from the consolidated statistics table (PS_STDNT_CONS_STAT) and displays the search results in the grid in the lower portion of the component. The system displays each student's consolidated academic statistics on a separate row. Use the horizontal tabs to move from one set of statistics to the next.

To override a student's calculated results, select the Overrides tab, select the check boxes that pertain to the statistics to override, then move to the applicable tab to change the statistics to override. The system always displays the unaltered process results on the various tabs of this component so that you can compare the process calculation to your changes.

After you update the consolidated academic statistics, click the Save button and the system stores your changes. The changes also appear in the Student Consolidated Stats component.

Producing Veteran Reports

This section discusses how to run the Veterans Report process (SRVETRPT) to produce veteran reports.

Prerequisites

As prerequisites to producing veteran reports, you must do the following tasks:

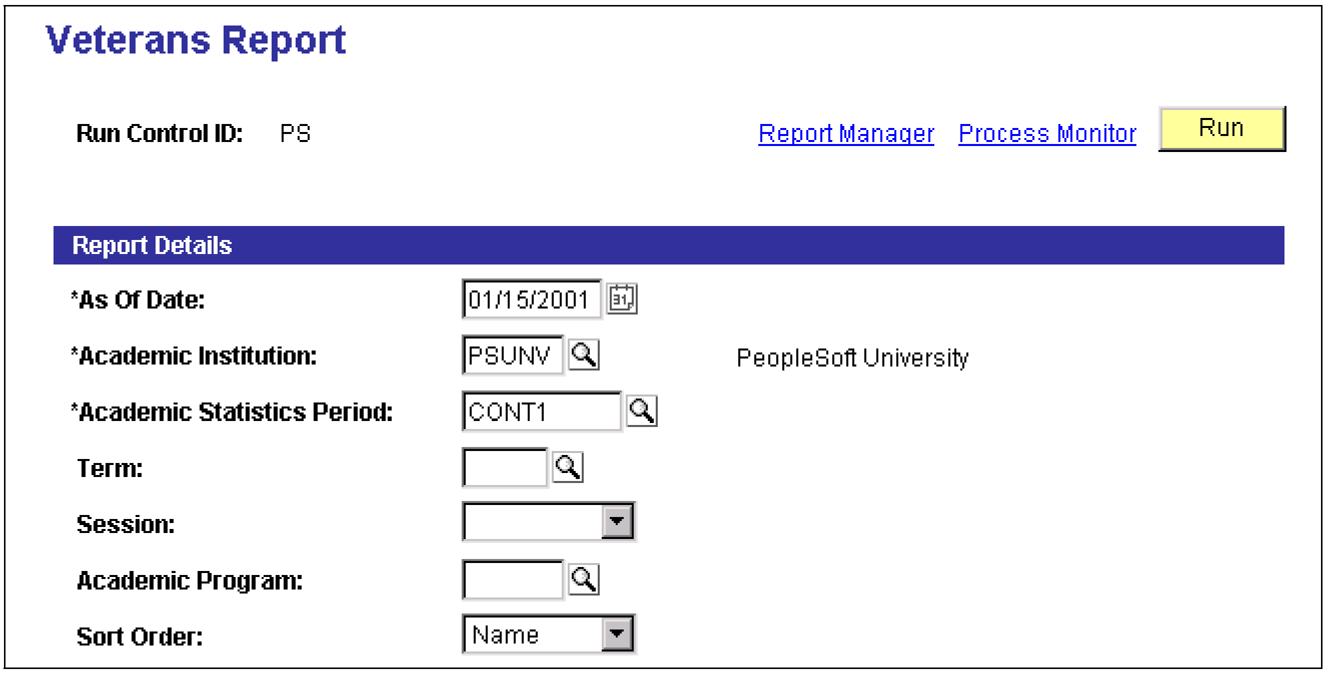
- Indicate, on the Bio/Demo Data page, that a student receives veterans benefits.
- Define, on the Addresses page, an additional address type to use when reporting these benefits.
- Run the Consolidate Academic Statistics process (SRPCCONP), which consolidates a student's academic load, based on her or his primary academic career and academic program, then stores the student's academic load in the consolidated statistics table (PS_STDNT_CONS_STAT).

Page Used to Produce Veteran Reports

Page Name	Object Name	Navigation	Usage
Veterans Report	RUNCTL_SRVETRPT	Manage Student Records, Manage Academic Records, Report, Veterans Report	Run the Veterans Report process to process veteran information and print a hard-copy report listing all students that receive veterans benefits.

Running the Veterans Report Process

Access the Veterans Report page.



Veterans Report page

The report draws data from populated tables in PeopleSoft Campus Community and PeopleSoft Student Records and includes the student's name, Social Security number, mailing address for the Veterans Administration check, date of birth, name of primary degree program, academic credit (current units in progress), academic load, and tuition. When you create a veterans report, the system uses the academic load in the consolidated statistics table for the report.

First run the SRVETRPT SQR report; then run the SR779--- Crystal report. The SQR report gathers the data and stores it in a list file. Crystal formats this data for output.

As of Date Enter the date through which the veterans benefits data is valid. This date appears on the Veterans report.

Academic Institution Select the academic institution for which you are producing the report.

Academic Statistics Period Select the academic statistics period for which you are producing the report.

Term Select the term that your institution is reporting to the Veterans Administration. (Optional)

Session

Select the session that your institution is reporting to the Veterans Administration. Values for this field are delivered with your system as translate values. You can modify these values. (Optional)

Academic Program

Select an academic program. (Optional)

Sort Order

The system sets the sort order for the report to *Name* and sorts the names alphabetically. You can sort by academic program or Social Security number.

Producing an NSLC Extract

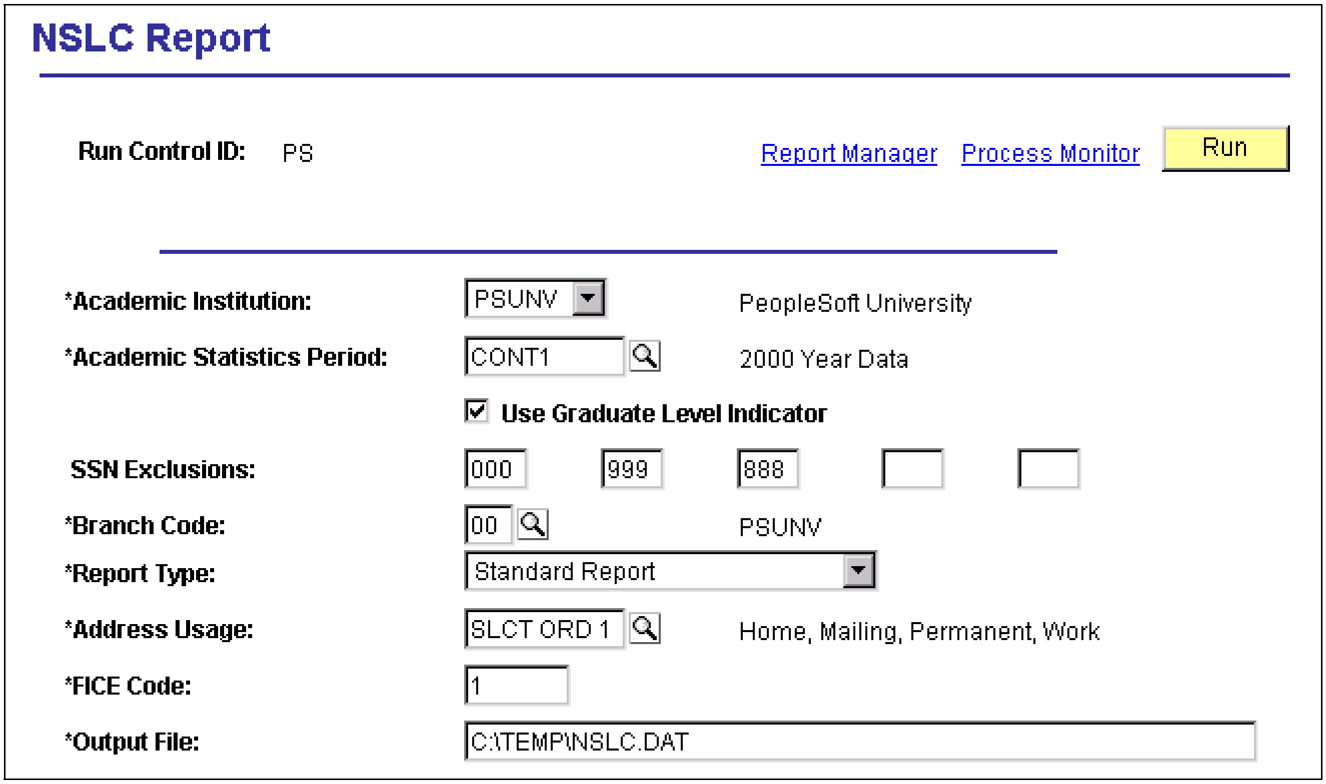
This section discusses how to run the NSLC Report process (SRNSLCEX.SQR) to produce a National Student Clearinghouse (NSLC) extract.

Page Used to Produce an NSLC Extract

Page Name	Object Name	Navigation	Usage
NSLC Report (national Student Clearinghouse report)	RUNCTL_SRNSLC	Manage Student Records, Manage Academic Records, Report, NSLC	Run the NSLC Report process to generate a flat file extract of students enrolled during a specific period of time that you can then send electronically to the NSLC.

Running the NSLC Report Process

Access the NSLC Report page.



NSLC Report page

The NSLC Extract report lists all students (except international students) who have been enrolled at your academic institution during an academic statistics period, regardless of if they receive loans or if they have withdrawn. The NSLC Extract process compiles the students' enrollment statuses based on the statistics that the system saves in the consolidated statistics table (PS_STDNT_CONS_STAT) when you run the Consolidate Academic Statistics process.

If a student has been withdrawn from an academic career (through the Term History - Withdrawal page), the system sets the WITHDRAWAL_CODE field on the student's career term record (STDNT_CAR_TERM) to WDR. Because the consolidated statistics processes gather students' career term data, the processes are able to include this withdrawal information in the consolidated statistics table. The NSLC Extract process is thus able to include the academic career data for these withdrawn students in the extract. The NSLC Extract process uses the status date of the withdrawal from the Last Date of Attendance field on the Term History - Withdrawal page.

In addition to the extract, the NSLC Extract process sends a report directly to your printer. This report lists all students within a specified academic institution and academic statistics period that must be reported to the NSLC. The report includes a header record identifying the institution (Federal Interagency Committee on Education code and branch code), date of file, term of reporting, and whether report is standard, nonstandard, or graduate only; a detail record with the each student's Social Security number, first and last name, enrollment status (full-time, part-time, half-time, withdrawal, graduated, or deceased), and the corresponding status date, address, date of birth, term, term begin and end dates, and graduate level indicator (either yes or no); plus a trailer record containing counts of students in the extract. The trailer record includes the total number of student records in the extract file, a list of the students not included in the extract file, and messages stating why the process has not included these students (such as missing addresses, blank or invalid Social Security numbers, and invalid enrollment status). You can then fix the errors at the source.

Run the NSLC Report process (SRNSLCEX.SQR) process on a timeline that your institution determines in agreement with NSLC.

Academic Institution	Select the academic institution for which you are producing the report.
Academic Statistics Period	Select the academic statistics period for which you are producing the report.
Use Graduate Level Indicator	If your institution participates in the NSLC tax reporting service, select this check box to have the NSLC report process include a graduate level indicator in the NSLC extract file. The report process looks in the ACAD_CAR_TBL record for the graduate level indicator for the student's primary academic career. Set the graduate level indicator on the Academic Career Table 2 page. If your institution has flagged the student's primary academic career as graduate level, the report process sets the graduate level indicator flag on the extract file to *Y.* Otherwise, the report process sets the graduate level indicator flag on the extract file to *N.* Institutions not participating in the NSLC tax reporting service should clear this check box. **Note.** If this check box remains cleared on this page, the NSLC report process *does not* write a graduate level indicator to the extract, regardless of whether your institution has set graduate level indicators on the Academic Career Table 2 page.
SSN Exclusions (social security number exclusions)	Use these fields to exclude school-generated Social Security numbers and identification numbers from the NSLC Extract report, as required by the NSLC. Enter into each field the first three digits of the series you want to exclude, such as the 000 series and the 999 series. The NSLC Extract process excludes all Social Security numbers within the series. You can list anywhere from zero to five series.
Branch Code	Select the branch code for the NSLC extract.
Report Type	Select from the following choices the report type for the NSLC extract. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. *Graduates Only:* The process includes only graduated students. *Non-Standard Report:* The process includes only academic sessions not considered *regular* academic sessions, such as summer session. *Standard Report:* The process includes only *regular* academic sessions.
Address Usage	Select the address usage that the NSLC Extract process should follow. Address usage is how the process locates the address of students included in the extract.
FICE Code (Federal Interagency Committee on Education code)	Enter the FICE code to appear in the NSLC extract for this academic institution. This value appears by default from the Academic Institution 3 page.
Output File	In addition to sending report output for this process to a file (through setting preferences in the Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps

to a folder with appropriate read and write permission. If you can not locate such a folder, consult your system administrator.

Building OLAP Cubes for Records Analysis

This section provides an overview of OLAP cubes for records analysis and discusses how to run the Student Records Build Cube process (SRBLDHC).

Understanding OLAP Cubes for Records Analysis

To fulfill your researching and reporting needs, such as for IPEDS reporting, PeopleSoft Student Administration provides the Student Records Build Cube process, which gives you the tools and templates you need to build your own Online Analytical Processing (OLAP) cubes for Student Records.

Online Analytical Processing (OLAP) is the multidimensional analysis of application data, performed interactively. With PeopleSoft, you can build multidimensional OLAP databases, known as cubes. Although they're called cubes, OLAP databases can have more than three dimensions.

PeopleTools provides the PeopleSoft Cube Manager tool. PeopleSoft Student Records, in addition, provides a set of dimensions, cube templates, and analysis models for you to use. Here's a quick definition of the parts that make up a cube:

Part	Definition
Dimensions	The metadata, or structure of a OLAP database. For instance, you might have an OLAP database that has dimensions of academic career, gender, and ethnicity. These dimensions would contain all the possible values for these categories. Dimensions can be defined using trees, queries, or a combination of the two.
Measure	The mathematical measure in the cube. In PeopleSoft Student Records, this is a count of the number of students meeting the selection criteria (usually those that fit within a specific academic statistics period on the Consolidated Statistics table). PeopleSoft has provided this counting measure through views in the database, which are used in data source queries.
Data Source Query	The selection for the cube. A data source query contains all the elements that make up the dimension of the cube, plus the measure.

Part	Definition
Analysis Model	The basic structure of a cube: the dimensions and measures that make up a cube. This way you can define many dimensions, and many measures, and then mix and match them in various analysis models.
Cube Template	Specification of which third-party platform the cube shall reside in—Essbase or PowerPlay—along with the parameters necessary for these platforms.

In PeopleSoft Student Records, we also provide the following elements:

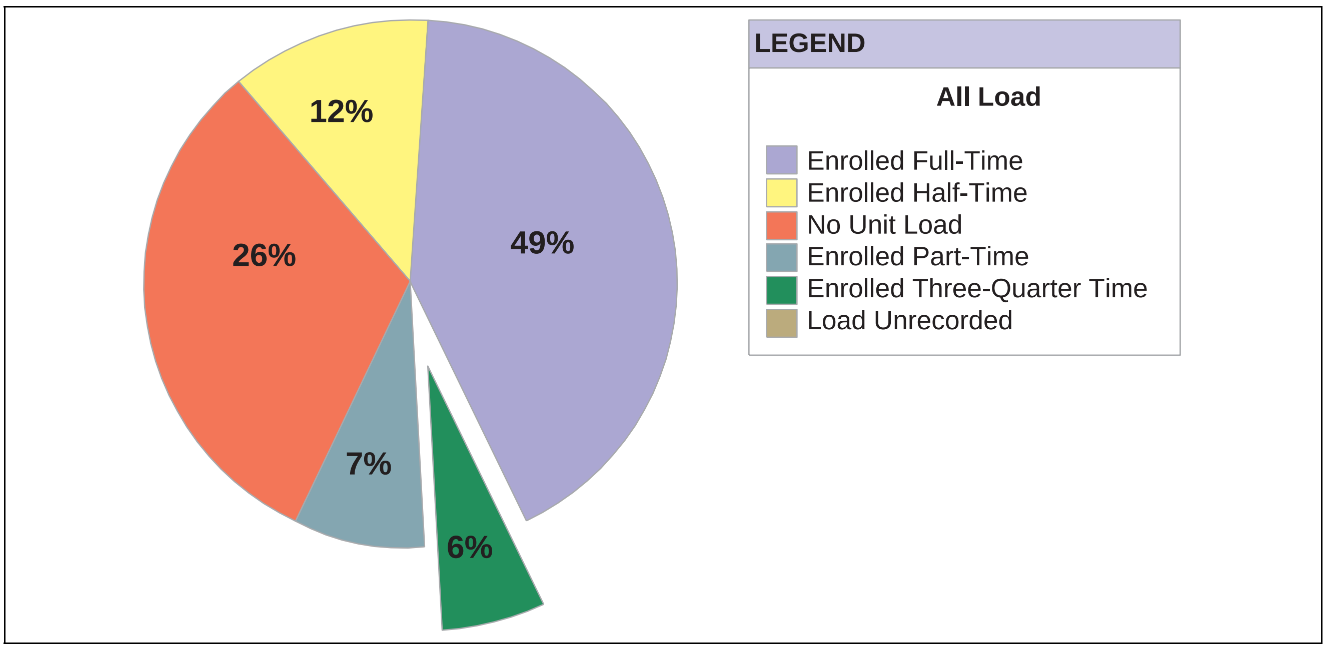
Element	Delivered with System
Dimensions defined by trees	CAREER (Academic Career) SRTERM (Term & Years)
Dimensions defined by queries	ACAD_PROG (Program) AGE_CATEGORY (Age Category) COHORT (Student Cohorts) ETHNIC_GROUP (Ethnic Group) GENDER (Gender) LEVEL (Academic Level) LOAD (Academic Load) PLAN_DGR (Academic Plan and Degree) SPORT (Athletic Sport)
Data source queries	SRCBDS1 (used in ENROLL_CUBE Analysis Model) SRCBDS2 (used in PLANCMP Analysis Model) SRCBDS3 (used in CHRTPRG Analysis Model)
Analysis model templates	ENROLL_CUBE (Sample Enrollment Data Cube) PLANCMP (Sample Plan Completions Data Cube) CHRTPRG (Student Cohort-Program Data Cube)
Cube templates (all in PowerPlay)	SR_ENROLLCUBE (Enrollment Cube Template) SR_CMPCUBE (Completions Cube Template) SR_CHRTCUBE (Cohort-Program Cube Template)

The cube templates delivered with PeopleSoft Student Records draw data from the consolidated statistics table (PS_STDNT_CONS_STAT). Use the Build Student Records Cube run control page to build these cubes.

To populate the PeopleSoft Student Records cubes with the data, run the Consolidate Academic Statistics process (SRPCCONP), which gathers and consolidates each student's academic statistics for a specific period of time. Then run the Student Records Build Cube process (through the Build Student Records Cube page). This process uses OLAP by means of the PeopleSoft Cube Manager in PeopleTools to extract the data that you desire from the Consolidated Statistics table (PS_STDNT_CONS_STAT), then stores the data in an OLAP database.

With the Student Records Build Cube process, you have the ability to analyze various statistical data, such as the number of enrolled students by ethnicity and gender; the number of international students; and the number of freshmen, sophomores, graduate students, and so on. The run control record is built upon consolidated statistics. The cube templates are built upon the consolidated statistics table (PS_STDNT_CONS_STAT).

Once you've built your cubes and pulled the data into them, you can use PowerPlay (a third-party application delivered with your PeopleSoft system) to access the data from the OLAP cube and provide output. PowerPlay is a desktop solution that has an allocation of space for OLAP databases and a restricted ability to manipulate the OLAP databases. If you want to avoid these restrictions, use Essbase. Essbase is shipped separately from PeopleTools. If you choose to use Essbase, your institution will have to create its own templates. The following diagram is an example of how PowerPlay can analyze the data in your cube:



Example of analyzing cube data through PowerPlay

See Also

Chapter 36, "Consolidating and Reporting Academic Statistics," Performing Academic Statistics Consolidation, page 843

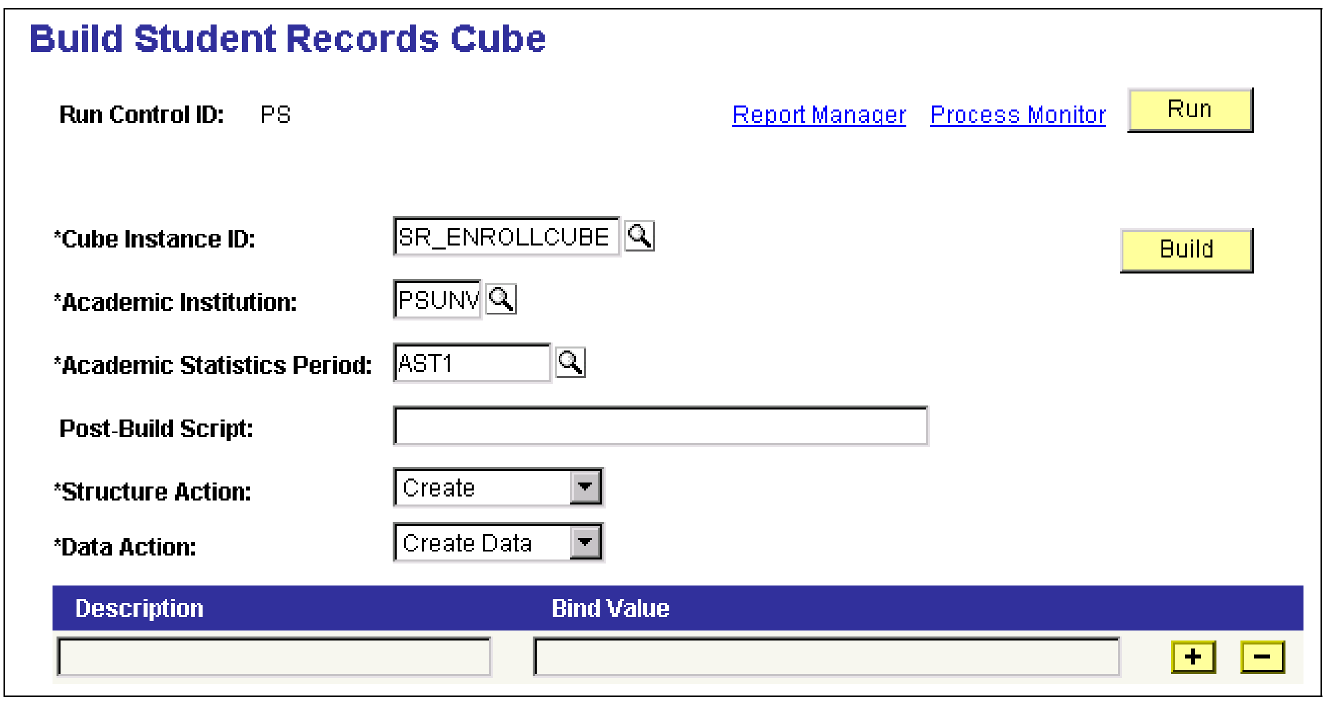
PeopleSoft PeopleTools PeopleBook, Reporting and Analysis Tools, "Cube Manager," Building OLAP Cubes, Building Cube Templates

Page Used to Build OLAP Cubes for Records Analysis

Page Name	Object Name	Navigation	Usage
Build Student Records Cube	RUNCTL_SRCUBE	Manage Student Records, Manage Academic Records, Process, Build SR Cube	Run the Student Records Build Cube process (SRBLDHC). Based on the cube template, academic institution, and academic statistics period that you select, the process queries the consolidated statistics table (PS_STDNT_CONS_STAT) and pulls data from the table into the OLAP cube. You can then use PowerPlay (delivered with PeopleTools) or Essbase to analyze the cube data.

Running the Build Student Records Cube Process

Access the Build Student Records Cube page.



Build Student Records Cube page

Cube Instance ID

Specify the cube instance ID. The cube instance provides a template with the dimensions of your cube.

Academic Institution

Select that academic institution that contains the academic statistics period from which you are building your cube. Define academic Institutions on the Academic Institution Table component.

Academic Statistics Period Select the academic statistics period for which you are pulling data from the consolidated statistics table to build your cube.

Note. You must run the Consolidate Academic Statistic process (SRPCCONP) for the academic statistics period for which you want to create an OLAP cube.

Post-Build Script The postbuild script refers to an MDL file for PowerPlay or any command line for Windows. This is a powerful feature that enables you to extend the capabilities of the Cube Manager. For example, you could use this feature to specify an Esscmnd script that sets up security. Then, rather than having to configure security manually every time a cube is built, you could write a postbuild script once and execute it for each build.

Note. If the default calculation script has been specified to run in the Essbase cube template, the default calculation script runs first, then the command line here is invoked to run a subsequent script.

Structure Action Select from the following options the metadata action that should occur during the build.

Create: Create the cube. If the cube already exists, then PeopleSoft Cube Manage recreates it—overwriting any dimensions and data that previously existed.

Update: This option is linked to the Meta-Data Update Action option on the Essbase Cube Template page. It updates the structure of the cube according to setting for metadata update action. For PowerPlay, this has the same effect as *Create.*

None: Do not make any changes to the structure of the cube or its individual dimensions (you might want to update the data only).

Data Action Select from the following options the data action that you want to occur during the build.

Create: Completely reload the data, overwriting any existing data.

Update: Update the existing data in the cube. For Essbase, this option is linked to the Data Load Action on the Essbase Cube Template page.

None: Do not make any changes to the data in the cube (you might want to update the structure only).

Description and **Bind Value** Enter query bind values and their descriptions if desired. If you want to use dynamic queries, you have to create a query that joins the run control with the desired record, and joins the user ID and the run control ID. The delivered queries are not dynamic.

Build Select to view and edit the object definition for the specified cube instance ID.

See Also

PeopleSoft PeopleTools PeopleBook

Using PeopleSoft Applications

CHAPTER 37

Viewing Student Records Process Messages

This chapter discusses how to view system messages for certain PeopleSoft Student Records COBOL processes.

Viewing System Messages for Student Records COBOL Processes

You can view system messages for certain COBOL processes within PeopleSoft Student Records that are specifically coded to use this message log. These processes log all messages to the student records message log table whenever you run them. The messages include successful completions of the process and errors that the process encounters. When you run one of these processes, the system displays a message indicating that you can view messages for the process on the Message Log page. Depending on the commit frequency of the process, you can usually view messages in this catalog only after the process completes.

This section discusses how to view these system messages.

Page Used to View System Messages for Student Records COBOL Processes

Page Name	Object Name	Navigation	Usage
Message Log	MESSAGE_LOG_SR	• Manage Student Records, Establish Courses, Inquire, Message Log • Manage Student Records, Manage Academic Records, Inquire, Message Log	View system messages.

Viewing System Messages

Access the Message Log page.

Process Instance

A unique number that identifies each process request and its position in the queue. The system automatically increments and assigns a process instance value to each process requests.

JobID

Multiple process definitions can be logically linked into a job request to process each request serially or in parallel, and optionally to initiate subsequent processes based on the return code from each prior request. If applicable, the system displays the identification code for the PSJob.

Program Name	If applicable, the system displays the name of the program within the PSJob to which the messages relate.
Message Sequence	Each individual message has a sequence in relation to the others, revealing the order in which the process wrote the messages to the log.
Last Update Date Time	The date and time that the system last updated the message.
Severity	The system displays the severity of the message, such as *Error.*
Message Text	Information about the process status is shown here. Typically, this field displays messages that describe the status of the program that you are running.
Explanation	A more detailed explanation of the message text.

CHAPTER 38

(CAN) Generating Canadian Government Reports

This chapter provides an overview of the types of reports that you can run with the PeopleSoft Canadian Government Reporting feature, and discusses how to:

- Review students in the student list.
- (Optional) Generate a selected student report.
- (Optional) Freeze a student list.
- Run the student extract program and generate a flat file.
- Verify extract results and view the audit reports.
- Review reporting data.
- (Optional) Correct reporting data and generate a flat file.
- Archive extract table data.

See Also

Chapter 15, "(CAN) Setting Up Canadian Government Reporting," page 297

Understanding Canadian Government Report Generation

Generating Canadian government reports is a multiple step process. An overview of the process is as follows:

1. Set up all of your government reporting data and populate the Student List table.
2. (Optional) Generate a report of students.
3. (Optional) Freeze the student list.
4. Run the extract process.
5. Review the report data.
6. (Optional) Correct the source pages or online pages and rerun the extract process. Or, correct the data directly in the extract table.
7. Generate the flat file.
8. Deliver the flat file to the federal or provincial government.
9. Archive the extract data table file.

These steps are discussed in the following sections.

Prerequisites

Before you can generate extract reports and flat files, you must:

- Set up your system for Canadian Government reporting.
- Populate the Student List.

See Also

Chapter 15, "(CAN) Setting Up Canadian Government Reporting," page 297

Chapter 15, "(CAN) Setting Up Canadian Government Reporting," Loading the Student ID Table, page 338

Reviewing the Student List

This section discusses the page you use to verify the population of students you want to process.

Prerequisites

Before you can review the student list, you must first populate the table with rows of student data.

Page Used to Review the Student List

Page Name	Object Name	Navigation	Usage
Student List	CAN_STDNT_LST	Government Reporting, Government Reporting Canada, Use, Student List, Student List	Review or add student data to define the group of students that you want to process.

Reviewing Student Data

Access the Student List page.

Verify that the population of students in the student list matches the population you want to process. At run time, you can single out students with the Select check box selected, or you can process all students in the Student List.

See Also

Chapter 15, "(CAN) Setting Up Canadian Government Reporting," Loading the Student ID Table, page 338

Generating a Report of Selected Students

The Student Selection Report contains a list of students that correspond to those on the Student List page. You can generate the report before you run the reports extract program.

Page Used to Generate the Student Selection Report

Page Name	Object Name	Navigation	Usage
Selected Student Report	RUNCTL_CAN_SRSTSEL	Government Reporting, Government Reporting Canada, Report, Selected Student Report, Selected Student Report	Define run parameters for the Student Selection Report (SRSTEL).

Generating a Student List Report

Access the Selected Student Report page.

Academic Institution Enter the institution for which you want to generate a student selection report.

Report Type Select the report for which you want to generate a student selection report.

Report Period Enter the report period for which you want to generate a student selection report.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRSTSEL process at user-defined intervals.

Freezing a Student List

PeopleSoft provides you with the ability to "freeze" the student list you generate.

Running the freeze process is optional. As a result of running the freeze process, the system prevents you from making changes or additions to the CAN_STDNT_LST table after the freeze date you specify. You can change key information after you run the freeze process. Your institution's business processes determine the timing of this process.

Pages Used to Freeze a Student List

Page Name	Object Name	Navigation	Usage
Freeze Student List	RUNCTL_CAN_FRZE	Government Reporting, Government Reporting Canada, Process, Freeze Student List, Freeze Student List	Define run parameters for the Student ID Freeze report (SRFREEZE).

Running the Student List Freeze Process

Access the Freeze Student List page.

Academic Institution Enter the institution for which you want to freeze a student list.

Report Type Select the report for which you want to freeze a student list.

Report Period Enter the report period for which you want to freeze a student list.

Student ID Freeze Date Enter the date on which you want to freeze student list records. The system excludes from the previously generated student list all students who do not meet your selection criteria as of the date you specify.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRFREEZE process at user-defined intervals.

Running the ESIS Extract Process

This section discusses how to:

- Run the ESIS Institution extract process and generate the corresponding flat files.
- Run the ESIS Student extract process and generate the corresponding flat files.

Pages Used to Run the ESIS Extract Process

Page Name	Object Name	Navigation	Usage
ESIS Institution Process	RUNCTL_CAN_ESIS_I	Government Reporting, Government Reporting Canada, Process, ESIS Institution Process, ESIS Institution Process	Define run parameters for the Create Extract for ESIS Instit process (SRXTRESI) and the Create Flat file for ESIS Inst process (SRCRFESI).
ESIS Student Process	RUNCTL_CAN_ESIS_S	Government Reporting, Government Reporting Canada, Process, ESIS Student Process, ESIS Student Process	Define run parameters for the Create Extract for ESIS Stdnt process (SRXTRESS) and the Create Flat file for ESIS Std process (SRCRFESS).

Running the ESIS Institution Process

Access the ESIS Institution Process page.

The ESIS Institution flat file process generates the following three flat files:

- The ESIS ID (institution description) file lists all unique terms and sessions in the term group table.
- The ESIS IP (institution program) file lists all of the plans and programs mapped in the Canadian Program and Plan mapping tables.
- The ESIS IC (institution course) file lists all course IDs for which classes have been scheduled during the terms and sessions included in the term group table, for the selected reporting period.

Academic Institution Enter the institution for which you are running the process.

Report Period Select the period for which you are running the process. This field prompts against the report period table.

File Path To send the extract output to a file directory, 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.

Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).

Click Run to run this request and select Create Extract for ESIS Instit. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for ESIS Inst. Click OK.

Running the ESIS Student Process

Access the ESIS Student Process page.

Academic Institution Enter the institution for which you are running the process.

Report Period Select the period for which you are running the process. This field prompts against the report period table.

File Path To send the extract output to a file directory, 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.

Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected will remain unchanged by the process.

Click Run to run this request and select Create Extract for ESIS Std. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for ESIS Stdnt. Click OK.

Running the USISE Extract Process

This section discusses how to run the USISE extract process and generate a corresponding flat file. Run the USISE extract process if you submit your reporting file directly to the federal government.

Here's how to run the USISE extract process and flat file generation for all provinces besides Ontario:

1. Access the USISE Extract Process page and run the USISE extract process.

2. Access the USISE Extract Process page and run the USISE flat file process.

Note. For Ontario Fall USISE reporting, where the FALL USIS Enrollment reporting submission includes the OUAC elements, running the extract process is a two-step process.

Here's how to run the USISE extract process for Ontario *Fall* USISE reporting:

1. Access the MET Extract Process page and run the MET extract process.
2. Access the OUAC Extract Process page and run the OUAC extract process.
3. Access the OUAC Extract Process page and run the OUAC flat file process.

   When you run the OUAC flat file generation process, the system generates two files. One file contains only OUAC elements. The second file is a combined file that contains the USISE, MET, and OUAC elements.

Here's how to run the USISE extract process for Ontario USISE reporting *not* in Fall:

1. Access the MET Extract Process page and run the MET extract process.
2. Access the MET Extract Process page and run the MET flat file process.

See Also

Chapter 38, "(CAN) Generating Canadian Government Reports," Running the MET Extract Process, page 872

Chapter 38, "(CAN) Generating Canadian Government Reports," Running the OUAC Extract Process, page 873

Page Used to Run the USISE Extract Process

Page Name	Object Name	Navigation	Usage
USISE Extract Process	RUNCTL_CAN_USE	Government Reporting, Government Reporting Canada, Process, USISE Report Process, USISE Extract Process	Define run parameters for the Create Extract for USISE process (SRXTRUSE) and the Create Flat file for USISE process (SRCRFUSE).

Entering USISE Extract Process Parameters

Access the USISE Extract Process page.

Academic Institution — Enter the institution for which you are running the process.

Report Period — Select the period for which you are running the process. This field prompts against the report period table.

File Path — To send the extract output to a file directory, 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.

Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection

To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected will remain unchanged by the process.

Data Type

Enter the DATYPE element.

Reporting Type

Enter the INSTYP element.

Click Run to run this request and select Create Extract for USISE. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for USISE. Click OK.

Running the CIS Extract Process

This section discusses how to run the CIS extract process and generate a corresponding flat file. Run the CIS extract process if you submit your reporting file directly to the federal government.

Page Used to Run the CIS Extract Process

Page Name	Object Name	Navigation	Usage
CIS Extract Process	RUNCTL_CAN_CIS	Government Reporting, Government Reporting Canada, Process, CIS Report Process, CIS Extract Process	Define run parameters for the Create Extract for CIS process (SRXTRCIS) and the Create Flat file for CIS process (SRCRFCIS).

Entering CIS Extract Process Parameters

Access the CIS Extract Process page.

Academic Institution

Enter the institution for which you are running the process.

Report Period

Select the period for which you are running the process. This field prompts against the report period table.

File Path

To send the extract output to a file directory, 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.

Note. The file path must have a “\” (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection

To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected will remain unchanged by the process.

Click Run to run this request and select Create Extract for CIS. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for CIS. Click OK.

Running the MET Extract Process

This section discusses how to run the MET extract process and generate a corresponding flat file.

Page Used to Run the MET Extract Process

Page Name	Object Name	Navigation	Usage
MET Extract Process	RUNCTL_CAN_MET	Government Reporting, Government Reporting Canada, Process, MET Report Process, MET Extract Process	Define run parameters for the Create Extract for MET process (SRXTRMET) and the Create Flat file for MET process (SRCRFMET).

Entering MET Extract Process Parameters

Access the MET Extract Process page.

Academic Institution

Enter the institution for which you are running the process.

Report Period

Select the period for which you are running the process. This field prompts against the report period table.

File Path

To send the extract output to a file directory, 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.

Note. The file path must have a “\” (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection

To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected will remain unchanged by the process.

Data Type Enter the DATYPE element.

Reporting Type Enter the INSTYP element.

Click Run to run this request and select Create Extract for MET. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for MET. Click OK.

Running the OUAC Extract Process

In Ontario, simply running the MET extract process and generating the MET flat file will satisfy most of your reporting.

However, in Ontario, where the FALL USIS Enrollment reporting submission includes the OUAC elements, the process is more complex.

Here's how to generate the OUAC report for Ontario Fall USIS Enrolment reporting:

1. Run the MET extract process.
2. Run the OUAC extract process.
3. Run the OUAC flat file generation process.

When you run the flat file process for OUAC, it generates two files. One file contains just the OUAC elements, and the second file is a combined file that contains the USISE, MET, and OUAC elements.

See Also

Chapter 38, "(CAN) Generating Canadian Government Reports," Running the MET Extract Process, page 872

Page Used to Run the OUAC Extract Process

Page Name	Object Name	Navigation	Usage
OUAC Extract Process	RUNCTL_CAN_OUAC	Government Reporting, Government Reporting Canada, Process, OUAC Report Process, OUAC Extract Process	Define run parameters for the Create Extract for OUAC process (SRXTROUC) and the Create Flat file for OUAC process (SRCRFOUC).

Entering OUAC Extract Process Parameters

Access the OUAC Extract Process page.

Academic Institution Enter the institution for which you are running the process.

Report Period Select the period for which you are running the process. This field prompts against the report period table.

File Path To send the extract output to a file directory, 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.

Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected will remain unchanged by the process.

Click Run to run this request and select Create Extract for OUAC. Click OK. Once the extract process completes, return to the Process Scheduler Request page and select Create Flat file for OUAC. Click OK.

Verifying Report Results and Viewing the Audit Reports

After you run the extract process, there are a number of audit reports that you can run to verify that the system generated reporting data for all students in the student list table. This section discusses how to:

- Run the Student Description Audit.
- Run the Student Program Audit.
- Run the Student Course Audit.

Pages Used to Verify Report Results

Page Name	Object Name	Navigation	Usage
Student Description Audit	RUNCTL_CAN_SDAUD	Government Reporting, Government Reporting Canada, Report, Student Description Audit, Student Description Audit	ESIS: Verify that the system reported all students in the student list table. This report compares the students reported in the SD file to each unique student ID in the CAN_STDNT_LST table and reports the differences.
Student Program Audit	RUNCTL_CAN_SPAUD	Government Reporting, Government Reporting Canada, Report, Student Program Audit, Student Program Audit	ESIS: Verify that there is a corresponding record in the CAN_RPT_ESIS_SP table for all entries in the CAN_STDNT_LST table. Specifically, verify that the career, program, and plan entered for the student in the student list table are valid. If they are not, then the extract program does not produce a record on the SP, SC, and ST files. Invalid students will also be included in the report if the career, program, or plan entered for the student is not valid. CIS, MET, OUAC, USISE: Verify report discrepancies such as an invalid EMPLID, career, program, or plan.
Student Course Audit	RUNCTL_CAN_SCAUD	Government Reporting, Government Reporting Canada, Report, Student Course Audit, Student Course Audit	ESIS: Identify students who are enrolled in duplicate course IDs during the reporting period. If you find duplicate course IDs, you must manually delete one of the classes from the Student Course 1 page, as this condition will fail the Stats Canada audit. See Chapter 38, "(CAN) Generating Canadian Government Reports," Reviewing Report Data, page 876.

Running the Student Description Audit

Access the Student Description Audit page.

Academic Institution The institution for which you want to audit.

Report Period The report period for which you want to audit.

Click Run to run the SRSDAUD report using PeopleSoft Process Scheduler.

Running the Student Program Audit

Access the Student Program Audit page.

Academic Institution The institution you want to audit.

Report Type The report type you want to audit.

Report Period The report period you want to audit.

Click Run to run the SRSPAUD report using PeopleSoft Process Scheduler.

Running the Student Course Audit

Access the Student Course Audit page.

Academic Institution The institution you want to audit.

Report Period The report period you want to audit.

Click Run to run the SRSCAUD report using PeopleSoft Process Scheduler.

Reviewing Report Data

After you run the extract process, you can view and edit the results by navigating to online pages that display the extract report results. However, you cannot add a new row of information for a student. If you need to add a row of data, you must add another line in the CAN_STDNT_LST table with its associated key field values and re-run the extract report.

Pages Used to Review Report Data

Page Name	Object Name	Navigation	Usage
ESIS Institution Description	CAN_RPT_ESIS_ID	Government Reporting, Government Reporting Canada, Use, ESIS Institution Description, ESIS Institution Description	ESIS: Review institution term data.
Institution Program 1	CAN_RPT_ESIS_IP	Government Reporting, Government Reporting Canada, Use, ESIS Institution Program, Institution Program 1	ESIS: Review institution and program code data.

Page Name	Object Name	Navigation	Usage
Institution Program 2	CAN_RPT_ESIS_IP3	Government Reporting, Government Reporting Canada, Use, ESIS Institution Program, Institution Program 2	ESIS: Review additional institution and program code data.
ESIS Institution Course	CAN_RPT_ESIS_IC	Government Reporting, Government Reporting Canada, Use, ESIS Institution Course, ESIS Institution Course	ESIS: Review additional institution and program code data.
Student Descr 1 (student description 1)	CAN_RPT_ESIS_SD	Government Reporting, Government Reporting Canada, Use, ESIS Student Description, Student Descr 1	ESIS: Review descriptive data for a student.
Student Descr 2 (student description 2)	CAN_RPT_ESIS_SD2	Government Reporting, Government Reporting Canada, Use, ESIS Student Description, Student Descr 2	ESIS: Review additional descriptive data for a student.
Student Descr 3 (student description 3)	CAN_RPT_ESIS_SD1	Government Reporting, Government Reporting Canada, Use, ESIS Student Description, Student Descr 3	ESIS: Review additional descriptive data for a student.
Student Descr 4 (student description 4)	CAN_RPT_ESIS_SD3	Government Reporting, Government Reporting Canada, Use, ESIS Student Description, Student Descr 4	ESIS: Review additional descriptive data for a student.
Student Descr 5 (student description 5)	CAN_RPT_ESIS_SD6	Government Reporting, Government Reporting Canada, Use, ESIS Student Description, Student Descr 5	ESIS: Review additional descriptive data for a student.
Student Program 1	CAN_RPT_ESIS_SP	Government Reporting, Government Reporting Canada, Use, ESIS Student Program, Student Program 1	ESIS: Review program related data for a student.
Student Program 2	CAN_RPT_ESIS_SP2	Government Reporting, Government Reporting Canada, Use, ESIS Student Program, Student Program 2	ESIS: Review additional program related data for a student.
Student Program 3	CAN_RPT_ESIS_SP3	Government Reporting, Government Reporting Canada, Use, ESIS Student Program, Student Program 3	ESIS: Review additional program related data for a student.
Student Program 4	CAN_RPT_ESIS_SP4	Government Reporting, Government Reporting Canada, Use, ESIS Student Program, Student Program 4	ESIS: Review additional program related data for a student.
Student Course 1	CAN_RPT_ESIS_SC	Government Reporting, Government Reporting Canada, Use, ESIS Student Course, Student Course 1	ESIS: Review course related data for a student.

Page Name	Object Name	Navigation	Usage
Student Course 2	CAN_RPT_ESIS_SC2	Government Reporting, Government Reporting Canada, Use, ESIS Student Course, Student Course 2	ESIS: Review additional course related data for a student.
Student Course 3	CAN_RPT_ESIS_SC3	Government Reporting, Government Reporting Canada, Use, ESIS Student Course, Student Course 3	ESIS: Review additional course related data for a student.
Student Trans Cred 1	CAN_RPT_ESIS_ST	Government Reporting, Government Reporting Canada, Use, ESIS Student Transfer Credits, Student Trans Cred 1	ESIS: Review receiving institution transfer coursework for a student.
Student Trans Cred 2	CAN_RPT_ESIS_ST2	Government Reporting, Government Reporting Canada, Use, ESIS Student Transfer Credits, Student Trans Cred 2	ESIS: Review external institution transfer coursework for a student.
USISE Elements 1	CAN_USISE	Government Reporting, Government Reporting Canada, Use, USISE Elements, USISE Elements 1	USISE: Review USISE elements data for a student.
USISE Elements 2	CAN_USISE_2	Government Reporting, Government Reporting Canada, Use, USISE Elements, USISE Elements 2	USISE: Review additional USISE elements data for a student.
CIS Elements 1	CAN_CIS	Government Reporting, Government Reporting Canada, Use, CIS Elements, CIS Elements 1	CIS: Review CIS elements for a student.
CIS Elements 2	CAN_CIS2	Government Reporting, Government Reporting Canada, Use, CIS Elements, CIS Elements 2	CIS: Review additional CIS elements for a student.
CIS Elements 3	CAN_CIS1	Government Reporting, Government Reporting Canada, Use, CIS Elements, CIS Elements 3	CIS: Review additional CIS elements for a student.
MET Elements 1	CAN_USMET	Government Reporting, Government Reporting Canada, Use, MET Elements, MET Elements 1	MET: Review MET elements for a student.
MET Elements 2	CAN_USMET_2	Government Reporting, Government Reporting Canada, Use, MET Elements, MET Elements 2	MET: Review additional MET elements for a student.
MET Elements 3	CAN_USMET1	Government Reporting, Government Reporting Canada, Use, MET Elements, MET Elements 3	MET: Review additional MET elements for a student.

Page Name	Object Name	Navigation	Usage
OUAC Elements	CAN_OUAC	Government Reporting, Government Reporting Canada, Use, OUAC Elements, OUAC Elements	OUAC: Review OUAC Elements for a student.

Correcting Report Data

Before you send your report to the government, you may want to correct the reporting data. You can correct reporting data in one of two ways:

1. PeopleSoft source pages (student data or setup data).
2. Report data pages (for example, the Student Course 1 page).

When you rerun the report, the system reprocesses any changes that you make using method one, as long as the effective date of the change is less than or equal to the Report Due Date field value on the Can Report Period page. This implies that you must rerun the extract program. If you do not enter a date in the Report Due Date field, the system references the system date to determine what to include in the report.

Note. You will make most corrections using method number one. You should only correct data using method two if you are certain that you will not be required to rerun the reports extract program. The extract program will overwrite any corrections you make in method three when you rerun the process. Changes made through method two are best used for updating the flat file.

See Also

Chapter 38, "(CAN) Generating Canadian Government Reports," Reviewing the Student List, page 866

Archiving Extract Table Data

After you submit the flat files to the government, you can archive the data in the reports extract archive tables. This process takes the data in the extract tables and saves it to an archive file. The report date acts as an effective date; so you can store multiple report periods in the applicable archive table. Once you run the archive process for a particular report and report period, you cannot run the archive process again. If you attempt to do so, the archive program writes a message in the log file.

The system archives your data in the following tables:

- CAN_ARC_ESIS_IC
- CAN_ARC_ESIS_ID
- CAN_ARC_ESIS_IP
- CAN_ARC_ESIS_SC
- CAN_ARC_ESIS_SD
- CAN_ARC_ESIS_SP

- CAN_ARC_ESIS_ST
- CAN_ARCH_USISE
- CAN_ARCH_USMET
- CAN_ARCH_CIS
- CAN_ARCH_OUAC

Page Used to Archive Extract Data

Page Name	Object Name	Navigation	Usage
Archive Extract File	RUNCTL_CAN_ARCHIVE	Government Reporting, Government Reporting Canada, Process, Archive Extract File, Archive Extract File	All: Define run parameters for the Canada Report Archive process (SRARCH).

Running the Archive Process

Access the Archive Extract Data page.

Academic Institution	Enter the institution that you want to archive.
Report Type	Enter the report type that you want to archive.
Report Period	Enter the report period that you want to archive.

Click Run to run the SRARCH report using PeopleSoft Process Scheduler.

APPENDIX A

PeopleSoft Student Records Reports

This appendix provides an overview of PeopleSoft Student Records reports and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Using PeopleSoft Applications

PeopleSoft Student Records Reports: A-Z

This table lists the PeopleSoft Student Records reports, sorted alphanumerically by report ID. The reports listed are Crystal and SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
SR201 Schedule of Classes	Lists a variety of details for each class that you schedule. (SQR)	Manage Student Records, Establish Courses, Report, Schedule of Classes, Schedule of Classes	RUNCTL_SRYSCHD
SR301 Course Catalog	Generates the Course Catalog report based on the selection criteria and report options you specify at run time. (SQR)	Manage Student Records, Establish Courses, Report, Course Catalog, Course Catalog	RUNCTL_SRYCATLG
SR704 Academic Level / Load Rule	Generates a report of the Level Load Rule Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Level Load Rule Tbl	PRCSRUNCNTL
SR704A Academic Level	Generates a report of the Academic Level Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Academic Level Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR704B Academic Load	Generates a report of the Academic Load Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Academic Load Tbl	PRCSRUNCNTL
SR705A Grade Basis Exception Mapping Detail	Generates a report for Grade Basis mapping Detail. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Grade Basis Map Detail	PRCSRUNCNTL
SR706 Degree	Generates a report of the Degree Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Degree Tbl	PRCSRUNCNTL
SR711 Degree Honors	Generates a report of the Degree Honors Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Degree Honors Table	PRCSRUNCNTL
SR712 External Subject	Lists all the external subjects defined in your PeopleSoft system, including effective date and descriptions, as defined on the External Subject Table page. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, External Subject Tbl	PRCSRUNCNTL
SR713 External Term	Lists all the external terms defined in your PeopleSoft system, including detail about each external term, as defined on the External Term page. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, External Term Tbl	PRCSRUNCNTL
SR714 Extracurricular Activity	Lists all the extracurricular activities defined in your PeopleSoft system, including detail about each extracurricular activity, as defined on the Extracurricular Activity Table page. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Extra Activity Tbl	PRCSRUNCNTL
SR716 Program Action	Lists all the program actions defined in your PeopleSoft system, including effective date and descriptions, as defined on the Program Action Table page. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Program Action	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR717 Academic Program Action Reason	Lists, by setID, all the program actions reasons defined in your PeopleSoft system, including effective date, descriptions, and associated program actions. This report references fields as defined on the Program Action Reason Table page. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Program Reason Tbl	PRCSRUNCNTL
SR718 Enrollment Reason	Lists, by setID and academic career, all the enrollment reasons defined in your PeopleSoft system, including detail about each enrollment reason. This report references fields as defined on the Enrollment Action Reason Table page. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Enrollment Reason Tbl	PRCSRUNCNTL
SR719 Exam Code	Generates a report for the Exam Code Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Exam Code Tbl	PRCSRUNCNTL
SR720 Requirement Designation	Generates a report for Requirement Designation Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Requirement Desig Tbl	PRCSRUNCNTL
SR727 Instructor / Advisor	Generates a report for Instructor/Advisor Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Instructor / Advisor	PRCSRUNCNTL
SR727A Instructor Advisor Role	Generates a report for Instructor Advisor Role Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Instructor / Advisor Role	PRCSRUNCNTL
SR733 Grading Scheme	Generates a report of the grading scheme table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Grading Scheme Tbl	PRCSRUNCNTL
SR733A Grading Basis	Generates a report of the grade basis table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Grading Basis Tbl	PRCSRUNCNTL
SR733B Grade	Generates a report of the Grade Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Grade Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR733C Grade Basis Choice	Generates a report of the Grade Basis Choice Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Grade Basis Choice	PRCSRUNCNTL
SR734 Facility	Generates a report of the Facility Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Facility Tbl	PRCSRUNCNTL
SR734A Facility Component	Generates a report of the Facility Component Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Facility Component	PRCSRUNCNTL
SR734B Facility Characteristics	Generates a report of the Facility Characteristic Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Facility Characteristic Tbl	PRCSRUNCNTL
SR735 Room Characteristic	Generates a report of the Room Characteristic Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Room Characteristic Tbl.	PRCSRUNCNTL
SR739 Term Type	Lists, by setID, all the term types defined in your PeopleSoft system, including effective date and description. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Term Type Tbl	PRCSRUNCNTL
SR739A Unit Conversion	Generates a report of the Unit Conversion Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Unit Conversion Tbl	PRCSRUNCNTL
SR740 Repeat Scheme	Generates a report of the Repeat Scheme Table. (Crystal)	Design Student Administration, Define Student Administration, Report, Repeat Scheme Tbl	PRCSRUNCNTL
SR740A Repeat Code	Generates a report of the Repeat Code Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Repeat Code Tbl	PRCSRUNCNTL
SR741 Class Notes Table	Generates a report of the Class Notes Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Class Notes Tbl,	PRCSRUNCNTL
SR742 Course Attribute	Generates a report of the Course Attribute Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Course Attribute Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR742A Course Attribute Value	Generates a report of the Course Attribute Value Table. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Course Attribute Value	PRCSRUNCNTL
SR743 Global Notes	Generates a report of the Global Notes Table. (Crystal)	Design Student Administration, Define Student Administration, ReportG-Z, Global Note Tbl	PRCSRUNCNTL
SR744 Class Notes	Generates a report for Class Notes. (Crystal)	Design Student Administration, Define Student Administration, ReportA-F, Class Notes	PRCSRUNCNTL
SR750 External Transfer Equivalency Rules	Generates a report for External Transfer Rules table. (Crystal)	Manage Student Records, Process Transfer Credit, Report, External Transfer Rule	PRCSRUNCNTL
SR750A External Transfer Component	Generates a report for External Transfer Component table. (Crystal)	Manage Student Records, Process Transfer Credit, Report, External Transfer Component	PRCSRUNCNTL
SR750C Transfer Equivalency Rules	Lists all the transfer equivalency rules that have been defined in your PeopleSoft Student Administration system for a given academic institution (as defined on the Course Transfer Rules page), including detailed information about each rule. The data for this report can also be viewed using the Course Transfer Rules component. (Crystal)	Manage Student Records, Process Transfer Credit, Report, Transfer Rules	RUNCTL_SR_TRCRRUL1
SR750D Transfer Rule Subject Areas	Lists all the component subject areas that have been defined in your PeopleSoft Student Administration system (on the Transfer Subject Area component), including detailed information about each component subject area. (Crystal)	Manage Student Records, Process Transfer Credit, Report, Transfer Subjects	RUNCTL_SR_TRCRRUL1
SR775 Study List	Generates student study lists by term, academic career, and academic program or group. (Crystal)	Manage Student Records, Manage Academic Records, Report, Student Study List	RUNCTL_SRSTDYLST

Report ID and Report Name	Description	Navigation	Run Control Page
SR776 Grade	Lists all data related to a student's career and term grades, including units taken, units earned, grading basis, official grade, and enrollment totals. (Crystal)	Manage Student Records, Manage Academic Records, Report, Student Grade Report, Student Grade Report	RUNCTL_SRGRDRPT
SR776P Grade	Generates the Grade Report from Push Button. Lists all data related to a student's career and term grades, including units taken, units earned, grading basis, official grade, and enrollment totals. (Crystal)	Manage Student Records, Manage Academic Records, Inquire, Student Grades, Student Grade Inquiry	STDNT_GRADE_INQ
SR777 Transcript	A singular advisement report, or a singular transcript report. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (Crystal)	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Results • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Results	SA_REPORT_RESULTS

Report ID and Report Name	Description	Navigation	Run Control Page
SR778M Transcript Print All	Prints all advisement reports for a transcript request, or all transcripts for a transcript request. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (Crystal)	• Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Request Detail • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Detail	SA_REQUEST_DETAIL
SR779 Veterans Report Summary	Lists all students within a specified academic institution and academic statistics period that are receiving Veterans benefits. (Crystal)	Manage Student Records, Manage Academic Records, Report, Veterans Report	RUNCTL_SRVETRPT
SR800CA Class Attendance	Generates the Class Attendance Report. This is a useful tool for hard-copy attendance tracking. (Crystal)	Manage Student Records, Establish Courses, Use, Class Attendance, Class Attendance	CLASS_ATTENDANCE
SR802 Enrollment Verification	Generates an enrollment verification report for individual students. (Crystal)	Manage Student Records, Manage Academic Records, Inquire, Enrollment Verification Req, Enrollment Verification Req	ENRL_VER_REQUEST
SR803 Printing Enrollment Ver. - Bat	Generates the enrollment verification reports in batch. Each report prints in alphabetical order by the student's name (last name, first name) and displays data according to the criteria selected on the Enrollment Verification Req component. (Crystal)	Manage Student Records, Manage Academic Records, Process, Enrollment Verification Print	RUNCTL_ENRL_VER

Report ID and Report Name	Description	Navigation	Run Control Page
SR804 Print Errors for Enrl Ver Bat	Lists errors that the enrollment verification process encounters due to student's having negative service indicators. (Crystal)	Manage Student Records, Manage Academic Records, Process, Enrollment Verification Print	RUNCTL_ENRL_VER
SR805 Graduation Report	Lists all current degree checkout status data for all students in your selected population, including ID, career, program, plan, subplan, degree, status, expected graduation term and completion term data. (SQR process, Crystal report)	• Manage Student Records, Manage Academic Records, Report, Graduation Reporting, Graduation Report • Manage Student Records, Manage Academic Records, Report, Graduation Reporting, Selection Results	RUNCTL_GRAD_RPT, RUNCTL_GRAD_RPT2
SRCLSRST Class Roster	Generates a report of students enrolled in a particular class, including name, grading basis, units taken, primary academic program, and enrollment status. If requested, this report also lists class permissions information. (SQR)	Manage Student Records, Establish Courses, Report, Class Roster	RUNCTL_SRCLASSRSTR
SRENRADV Enrollment Advisement	Generates an Enrollment Advisement report. (SQR)	Manage Student Records, Establish Courses, Report, Enrollment Advisement	RUNCTL_SRENRADV
SREXSCHD Exam Scheduling	Lists each course's scheduled exam time and facility. (SQR)	Manage Student Records, Establish Courses, Process, Exam Scheduling, Exam Scheduling	RUNCTL_SREXSCHD
SRGBEXPT Grading Basis Exception	Displays active grade basis exception mapping rules and their details. (SQR)	Design Student Administration, Define Student Records, Report, Grade Basis Exception, Grade Basis Exception	RUNCTL_SRGBEXCPT
SRGRDLPS Grade Lapse	Lists parameter information and enrollment request numbers for all lapsed grade processes. (SQR)	Manage Student Records, Establish Courses, Process, Grade Lapse, Grade Lapse	RUNCTL_SR_GRD_LPS

Report ID and Report Name	Description	Navigation	Run Control Page
SRLMSEX LMS Batch Extract	Lists high level information about a specific extract process. Detail such as setup values, run control parameters, output file formats, and total record counts referenced by a specific extract process are listed on the report. The report does NOT list the extracted data and is not to be confused with the actual extract file(s). To view the extracted data you must view the extract file itself. (SQR)	Manage Student Records, Manage Academic Records, Process, LMS Extract, Setup	RUNCTL_SRLMSEX3
SRNSLCEX NSLC Extract File Creation	Generates a report for National Student Clearinghouse (NSLC). This report lists run variables, informational messages about the process run, and NSLC report totals. (SQR)	Manage Student Records, Manage Academic Records, Report, NSLC	RUNCTL_SRNSLC
SRRSTRPT Grade Roster	Generates a report of the grade roster that instructors can use to write their midterm or final grades, or administrators can use to print out hard copies of the final grades for classes. (SQR)	Manage Student Records, Establish Courses, Report, Grade Roster Print, Grade Roster Print	RUNCTL_SRGRDROSTER
SRSPRMSN Class Permission	Generates a report that lists the number of class permissions assigned for each class. (SQR)	Manage Student Records, Establish Courses, Process, Class Permission, Class Permission	RUNCTL_SRSPRMSN
SRSTDNT2 Study List	Generates an individual student's study list by academic career and term. (SQR)	Manage Student Records, Manage Academic Records, Inquire, Enrollment Summary, Enrollment Summary	STDNT_ENRL_INQ
SRTCSTEV Student Transfer Evaluation	Lists an individual's transfer credit record. The report is designed in an easy-to-read format intended to be distributed to prospects, applicants, students, recruiters, or advisors. They can see what classes transferred and to which equivalent classes. They can also view their internal and external GPAs. (SQR)	• Manage Student Records, Process Transfer Credit, Inquire, Transfer Credit Summary, Selection Result • Manage Student Records, Process Transfer Credit, Report, Transfer Evaluation Report, Evaluation Reports	SRTC_RPT_DTL_RSLT, , RUNCTL_SR_TRCR_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
SRTRMDF Mid-Term Deficiency Summary	Lists students that have deficient mid term grades for the term you specify. (SQR)	Manage Student Records, Establish Courses, Report, Mid-Term Deficiency, Mid-Term Deficiency Report	RUNCTL_SRTRMDEFCNY
SRTRPRNT Advisement Report or Transcript report	Generates advisement reports for a transcript request, or all transcripts for a transcript request. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (SQR)	Manage Student Records, Manage Academic Records, Process, Transcript Print, Transcript Print	RUNCTL_SRTRPRINT
SRWORKLD Workload Copy and Recalc	Generates a report of part time and full time instructors that are over or under the allowed workload assignment. (SQR)	Manage Student Records, Establish Courses, Process, Workload Copy/Update	RUNCTL_WORKLD
SRWORKLD Workload Copy and Update	Lists workload data for individuals who fall into one of six reporting categories. (SQR)	Manage Student Records, Establish Courses, Process, Workload Copy/Update	RUNCTL_WORKLD

PeopleSoft Student Records Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed. The reports are listed alphanumerically by report ID.

SRLMSEX - LMS Batch Extract Report

LMS Institution Table Setup Values Reports the address usage, address usage description, and phone type specified on the Academic Institution 3 page.

Run Control	Reports the user ID, run control ID, institution, term, file type, and extract mode as specified on the LMS Extract - Setup page for this unique extract event.
Selection Criteria	Reports the option selected on the LMS Extract - Criteria page for this unique extract event. If *Filter* or *Class Number* is selected, the corresponding detail appears.
Output Files	Reports the extract file format. If the Combine File check box is selected on the LMS Extract - Output page, then a list of the files selected for extract and combining appear. If the Combine File check box is cleared on the LMS Extract - Output page, then the individual files selected for extraction and their individual file names and location appear.
Messages	Reports a warning when the extract process is unable to locate data that is required by a particular LMS type. For example, when extracting data to Blackboard CourseInfo, all students or "members" must have an email address specified on the Electronic Addresses page.
Total Records Count	Reports the number of people, group, and member records written to the extract file.

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

account You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting entry A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to anotherand a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account — A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

application agent — An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment — In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process — In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

benchmark job — In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.

budget check — In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control — In commitment control, budget control ensures that commitments and expenditures don’t exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document’s cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period — The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event — In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

catalog item — In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.

category — In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

ChartField — A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing — You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don’t delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See *activity.*
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addressesfor a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary locationindicated by a *1*is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *participant object.*
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan contextif three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

private view A user-defined view that is available only to the user who created it.

process See *Batch Processes.*

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record definition A logical grouping of data elements.

record field A field within a record definition.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

results management process
In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

routing
Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context
In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query
You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section
In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event
In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

self-service application
Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session
In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template
In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activitycharacteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See *Structured Query Report (SQR).*
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

table The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing Specifies control table data for each business unit so that redundancy is eliminated.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction loading process In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.

transaction type In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

uniform resource locator (URL) In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient /InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_ 401k.PAGES.FieldFormula.iScript_Home401k

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL
See *uniform resource locator (URL).*

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet
A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow
The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist
The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT
Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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