

Oracle® Student System

Implementation Guide

Release 11i

Part Number B10517-01

April 2003

Oracle Student System Implementation Guide, Release 11i

Part Number B10517-01

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Contents

Send Us Your Comments	xxxix
Preface.....	xxxiii
Intended Audience	xxxiii
How To Use This Guide	xxxiii
Typographic Conventions.....	xxxiii
Documentation Accessibility	xxxiv
Other Information Sources	xxxv
Do Not Use Database Tools to Modify Oracle Applications Data	xl
About Oracle	xl
 1 Introduction	
1.1 The Oracle E-Business Suite.....	1-1
1.1.1 The Applications in the E-Business Suite	1-2
1.2 Oracle Student System Implementation Overview.....	1-5
 2 Before You Begin	
2.1 Related Documentation.....	2-1
2.1.1 Online Documentation	2-1
2.1.2 Related User's Guides	2-1
2.1.3 Guides Related to This Product	2-2
2.1.3.1 <i>Oracle Student System User's Guide</i>	2-2
2.1.3.2 <i>Oracle Student System for the United Kingdom User's Guide</i>	2-2
2.1.3.3 <i>Oracle Student System Open Interfaces User's Guide</i>	2-2
2.2 Mandatory Dependencies	2-2
2.3 Conditional Dependencies.....	2-3
2.4 Oracle Student System Tablespace	2-4

3 Other Oracle Applications and Tools

3.1	Application Security.....	3-1
3.1.1	Defining Oracle Student System Responsibilities	3-1
3.2	Correspondence Printing	3-3
3.2.1	Prerequisites.....	3-4
3.2.2	Printing	3-4
3.3	Flexfields	3-5
3.4	Lookups.....	3-8
3.4.1	Defining Lookups.....	3-9
3.5	Oracle CRM Application Foundation.....	3-9
3.5.1	Oracle CRM Application Foundation Prerequisites	3-9
3.5.2	CRM Multichannel Delivery Service (1-1 Fulfillment)	3-9
3.5.3	Resource Manager	3-10
3.5.3.1	Role Types	3-10
3.5.3.2	Roles	3-10
3.5.3.3	Resource Groups	3-10
3.5.3.4	Resource Teams	3-10
3.5.4	Territory Manager	3-10
3.5.5	Interaction Tracking.....	3-11
3.5.5.1	Interaction History	3-11
3.5.5.2	Outcomes, Results, and Codes	3-11
3.5.5.3	Interaction Types.....	3-12
3.6	Oracle Discoverer	3-12
3.6.1	Oracle Discoverer Implementation Considerations	3-13
3.7	Oracle Financials.....	3-14
3.7.1	Oracle General Ledger	3-14
3.7.2	Oracle Receivables.....	3-14
3.7.2.1	Person Address Validation	3-14
3.7.2.2	Student Finance Lockbox	3-14
3.7.3	Oracle Payables.....	3-15
3.8	Oracle Human Resource Management Systems (HRMS)	3-15
3.9	Oracle iPayment.....	3-15
3.9.1	Prerequisites.....	3-16
3.9.2	Setting Up iPayment Lookups.....	3-16
3.9.3	Setting Up the Default Payment System.....	3-17

3.9.4	Creating New Payees.....	3-17
3.9.5	Setting Up Routing Rules.....	3-18
3.9.6	Setting Up Properties for IBY	3-18
3.10	Oracle Portal.....	3-20
3.10.1	Prerequisites for Oracle Portal	3-20
3.10.2	Setup for Oracle Student System Portlets.....	3-20
3.10.2.1	Users and Roles	3-20
3.10.2.2	Home Pages	3-21
3.10.2.3	Home Page Templates.....	3-21
3.10.2.4	Home Page Portlets	3-21
3.10.2.5	Student Home Page Portlets.....	3-22
3.10.2.6	Student My Information Tab Portlets	3-23
3.10.2.7	University Administrator Home Page Portlets	3-24
3.10.2.8	University Administrator Admissions Tab Portlets	3-25
3.10.2.9	University Administrator Enrollment Tab Portlets	3-26
3.10.2.10	Faculty Home Page Portlets	3-27
3.10.2.11	Faculty My Class Lists Tab Portlets	3-28
3.11	Oracle Student Recruiting.....	3-28
3.11.1	Oracle Marketing Online.....	3-29
3.11.1.1	Oracle Marketing Online Prerequisites	3-29
3.11.1.2	Enabling Inquiry Statuses	3-29
3.11.1.3	Setting Up Oracle Marketing Online	3-30
3.11.2	Oracle TeleSales.....	3-32
3.11.2.1	Oracle TeleSales Prerequisites.....	3-33
3.11.2.2	Setting Up Oracle TeleSales.....	3-36
3.12	Oracle Trading Community Architecture	3-41
3.12.1	Defining Oracle Student System and TCA.....	3-41
3.13	Oracle Web ADL.....	3-43
3.14	Oracle Workflow	3-43
3.14.1	Workflows.....	3-43
3.14.2	Business Events	3-44
3.14.3	Oracle Student System Workflows and Business Events.....	3-44
3.15	Profile Options.....	3-44
3.16	Self Service.....	3-45
3.16.1	Personalizing Self Service Pages.....	3-45

3.16.2	New User and Forgotten Password Functionality	3-45
3.16.2.1	New User/Forgotten Password Profile Options	3-45
3.16.2.2	Required Hyperlinks and User Definitions.....	3-46
3.16.2.3	Javascript Modifications.....	3-46
3.16.2.4	Batch Creation of Person User Names	3-47
3.16.3	Self-Service Inquiries	3-48

4 Systemwide Services: Person

4.1	Person Overview	4-1
4.2	Person Lookups	4-3
4.3	Person Data.....	4-6
4.3.1	Setting Up Person Data IGSPE052	4-6
4.3.1.1	Setting Up Person Types	4-6
4.3.1.2	Setting Up Person ID Types.....	4-7
4.3.1.3	Defining Alternate Person ID Types for UK Functionality.....	4-9
4.3.1.4	Setting Up Mandatory Data by Person Type	4-11
4.3.1.5	Setting Up Private Data Groups	4-12
4.3.1.6	Setting Up Self Service Person Responsibility	4-13
4.3.1.7	Mapping to Oracle HRMS Person Types.....	4-14
4.4	Person Responsibility	4-17
4.4.1	Setting Up Configuration Window IGSPE050	4-17
4.5	Person Matching Criteria.....	4-18
4.5.1	Setting Up Source Types IGSPE021	4-19
4.5.2	Setting Up Match Criteria Sets IGSPE022	4-20
4.6	Person Holds	4-22
4.6.1	Setting Up System Hold Effect Types IGSEN041	4-25
4.6.2	Setting Up Person Hold Types IGSEN042	4-26
4.7	Person Details IGSPE034	4-28
4.8	SEVIS Reporting	4-29
4.8.1	Exchanging Data with SEVIS.....	4-30
4.8.2	Oracle Student System and SEVIS Processing	4-31
4.8.3	Minimum SEVIS Setup and Processing Steps.....	4-32
4.8.3.1	Setting Up XML Gateway	4-32
4.8.3.2	Define Hubs	4-33
4.8.3.3	Setup Trading Partners.....	4-33

4.8.3.4	Entering SEVIS IDs for Institutions.....	4-34
4.8.4	Creating and Updating Exchange Visitor and Dependent Information.....	4-34
4.8.5	IGS: SEVIS Exchange Visitors Batch Process Concurrent Processes	4-35
4.8.6	Creating and Updating NonImmigrant Information	4-36
4.8.7	IGS: SEVIS Non-Immigrant Batch Process Concurrent Processes.....	4-36
4.8.8	Transferring Data from Oracle Student System to Third-Party Vendor.....	4-37
4.8.9	IGS: Purge Active Exchange Visitor Batch Concurrent Processes	4-38
4.8.10	IGS: Purge Active Non-Immigrant Batch Concurrent Processes.....	4-39
4.8.11	SEVIS Seeded Lookups.....	4-40

5 Systemwide Services: Calendar

5.1	Calendar Overview	5-1
5.1.1	Terminology	5-1
5.2	Setting Up Teaching Period Codes IGSA017	5-2
5.3	Calendar.....	5-3
5.3.1	Setting Up Calendar Statuses IGSCA001.....	5-5
5.3.2	Setting Up Calendar Types IGSCA002	5-6
5.3.3	Setting Up Rollover Calendar Instances IGSCA003.....	5-9
5.3.4	Setting Up Calendar Instance Relationships IGSCA004	5-11
5.3.5	Calendar Relationship Rules	5-13
5.4	Date Alias	5-19
5.4.1	Setting Up Date Alias Categories IGSCA005	5-24
5.4.2	Setting Up Date Aliases IGSCA006	5-24
5.4.3	Setting Up Date Alias Offset Constraints IGSCA007.....	5-27
5.5	Date Alias Instance.....	5-29
5.5.1	Setting Up Date Alias Instances IGSCA008.....	5-29
5.5.2	Setting Up Date Alias Instance Pair.....	5-31
5.5.3	Setting Up Date Alias Instance Offset Constraints.....	5-33
5.6	Admissions Calendars.....	5-36
5.7	Enrollments Calendars	5-36
5.8	Research Calendars.....	5-37
5.9	Assessment Calendars.....	5-42
5.10	Examination Calendars	5-43

6 Systemwide Services: Organizational Structure

6.1	Organizational Structure	6-1
6.2	Organizational Structure Configuration	6-4
6.2.1	Organizational Structure Lookups	6-4
6.2.2	Organization Structure Setup Navigation	6-4
6.2.3	Organizational Structure Data Setup - Note Type Tab IGSOR032	6-13
6.2.4	Organizational Structure Data Setup - Alternate ID Tab IGSOR032	6-14
6.3	Institutions	6-16
6.3.1	Institutions Lookups	6-16
6.3.2	Organizational Structure Data Setup - Institution Types Tab IGSOR032	6-17
6.3.3	Organizational Structure Data Setup - Institution Status Tab IGSOR032	6-18
6.3.4	Organizational Structure Data Setup - Institution Crosswalk Tab IGSOR032	6-19
6.3.5	Setting Up Institutions IGSOR029	6-20
6.3.5.1	Setting Up Addresses	6-22
6.3.5.2	Setting Up Institution Contacts	6-25
6.3.5.3	Setting Up Alternate IDs	6-26
6.3.5.4	Setting Up Accreditation Details	6-28
6.3.5.5	Setting Up Secondary Schools	6-29
6.3.5.6	Reviewing Institution History	6-30
6.3.5.7	Setting Up Institution Statistics	6-31
6.3.5.8	Setting Up Institution Notes	6-32
6.4	Locations	6-33
6.4.1	Location Type Organizational Structure - Location Type Tab IGSOR032	6-33
6.4.2	Setting Up Location Details IGSOR031	6-34
6.4.2.1	Setting Up Addresses	6-36
6.4.2.2	Setting Up Phone and Email Information	6-38
6.4.2.3	Setting Up Location Notes	6-40
6.4.3	Setting Up Buildings	6-41
6.4.4	Setting Up Rooms IGSPS099	6-42
6.4.5	Setting Up Location Relationships	6-44
6.5	Organizational Unit	6-46
6.5.1	Organizational Unit Lookups	6-46
6.5.2	Setting Up Organizational Statuses - Organization Status Tab IGSOR032	6-47
6.5.3	Setting Up Organizational Units IGSOR030	6-48
6.5.3.1	Setting Up Addresses	6-50

6.5.3.2	Setting Up Contact Information.....	6-53
6.5.3.3	Setting Up Organizational Unit Location.....	6-54
6.5.3.4	Setting Up Alternate IDs.....	6-55
6.5.3.5	Setting Up Organizational Structure Accreditation Details	6-56
6.5.3.6	Reviewing Organizational Unit History.....	6-58
6.5.3.7	Setting Up Organizational Structure Notes	6-59
6.5.4	Setting Up Organizational Unit Relationships IGSOR015	6-61
6.6	Function Filter.....	6-62
6.6.1	Function Filter Organization Structure Setup - Function Filter Tab IGSOR032 .	6-62
6.7	Venues.....	6-67
6.7.1	Setting Up Venues IGSAS017	6-67

7 Systemwide Services: Tracking

7.1	Tracking	7-1
7.1.1	Setting Up Tracking Statuses IGSTR003	7-7
7.1.2	Setting Up Tracking Step Catalogs IGSTR011	7-8
7.1.3	Setting Up Tracking Note Types IGSTR004.....	7-8
7.1.4	Setting Up Tracking Types IGSTR001.....	7-9
7.1.5	Setting Up Tracking Type Step Notes IGSTR002	7-11

8 Program Structure and Planning

8.1	Program Structure and Planning Overview.....	8-1
8.2	Program Structure and Planning Profile Options	8-7
8.3	Government Setup	8-8
8.3.1	Setting Up Government Program Types IGSST001	8-8
8.3.2	Setting Up Government Special Program Types.....	8-9
8.3.3	Setting Up Government Field of Study IGSST003	8-10
8.3.4	Setting Up Government Funding Sources IGSST006.....	8-11
8.3.5	Mapping to Government Discipline Groups IGSST007	8-13
8.3.6	Setting Up Government Attendance Types IGSST010	8-14
8.3.7	Setting Up Government Program Attendance Modes IGSST011	8-15
8.4	HESA Reference Data	8-16
8.5	Faculty Management	8-19
8.5.1	Setting Up Expected Workload IGSPS126.....	8-19
8.5.2	Setting Up Faculty Tasks IGSPS127.....	8-20

8.5.3	Setting Up Expected Workload Override Reason IGSPS128	8-21
8.5.4	Setting Up Degree Codes IGSPS093	8-22
8.6	Program.....	8-22
8.6.1	Setting Up Program Type Groups IGSPS002	8-29
8.6.2	Setting Up Program Types IGSPS001	8-30
8.6.3	Setting Up Program Categories IGSPS003.....	8-32
8.6.4	Setting Up Fields of Study IGSPS004	8-33
8.6.5	Setting Up Program Attendance Modes IGSPS005	8-34
8.6.6	Setting Up Program Attendance Type IGSPS006	8-35
8.6.7	Setting Up Program Group Types IGSPS007	8-38
8.6.8	Setting Up Awards IGSPS008.....	8-39
8.6.9	Setting Up Program Statuses IGSPS009	8-42
8.6.10	Setting Up Funding Sources IGSPS010	8-45
8.6.11	Setting Up Reference Code Types IGSPS011.....	8-46
8.6.12	Setting Up Reference Stage Type IGSPS028	8-48
8.6.13	Setting Up Disciplines IGSPS040	8-49
8.6.14	Setting Up Program and Unit Note Types IGSPS069	8-50
8.6.15	Setting Up Dictionary of Occupational Titles IGSPS070	8-51
8.6.16	Setting Up Programs Eligible for Financial Aid IGSPS073	8-52
8.6.17	Setting Up Catalog Definition IGSPS096	8-52
8.6.18	Setting Up Catalog Notes IGSPS097	8-54
8.6.19	Setting Up Basic Program Details IGSPS013	8-55
8.6.20	Setting Up Program Version Notes IGSPS027	8-60
8.6.21	Setting Up Special Requirements IGSPS062.....	8-61
8.6.22	Setting Up Enrollment Categories IGSEN009.....	8-62
8.7	Program Details	8-63
8.7.1	Setting Up Program Groups IGSPS012	8-65
8.7.2	Setting Up Program Awards IGSPS017	8-66
8.7.3	Setting Up Program Fields of Study IGSPS018.....	8-68
8.7.4	Setting Up Program Ownership IGSPS014.....	8-70
8.7.5	Setting Up Program Group Membership IGSPS015	8-72
8.7.6	Setting Up Program Reference Codes IGSPS023	8-73
8.7.7	Setting Up Program Categorizations IGSPS019.....	8-74
8.7.8	Setting Up Restricted Funding Sources IGSPS024	8-75
8.7.9	Setting Up Program Stages IGSPS026	8-77

8.7.10	Setting Up Program Occupational Titles IGSPS071	8-78
8.7.11	Setting Up UK Statistics IGSHE014 - Program Tab.....	8-79
8.8	Program Offering	8-82
8.8.1	Setting Up Program Offering IGSPS029	8-82
8.8.2	Setting Up Program Offering Notes IGSPS031	8-85
8.8.3	Setting Up Program Offering Text Notes IGSGE004	8-86
8.9	Final Program Details	8-87
8.9.1	Setting Up Program Categories IGSPS003	8-87
8.9.2	Setting Up Program Groups IGSPS012	8-88
8.9.3	Setting Up Primary Program Group IGSPS122	8-89
8.9.4	Setting Up Alternative Exits IGSPS016	8-90
8.9.5	Convert Programs to Active	8-92
8.10	Units	8-92
8.10.1	Setting Up Unit Statuses IGSPS042	8-93
8.10.2	Setting Up Unit Levels IGSPS043	8-95
8.10.3	Setting Up Unit Modes IGSPS044.....	8-97
8.10.4	Setting Up Unit Categories IGSPS041	8-98
8.10.5	Setting Up Unit Classes IGSPS045	8-100
8.10.6	Setting up Unit Internal Program Levels IGSPS046.....	8-101
8.10.7	Setting Up Unit Program Type Level IGSPS108.....	8-102
8.10.8	Setting Up Basic Unit Details IGSPS047	8-103
8.10.9	Setting Up Basic Unit Details Planned to Active IGSPS047.....	8-107
8.10.10	Setting Up Basic Unit Details - Create Occurrence IGSPS047	8-108
8.10.11	Setting Up Basic Unit Details - Teaching Responsibility IGSPS048.....	8-109
8.10.12	Setting Up Unit Grading Schemas IGSPS077.....	8-111
8.10.13	Setting Up Unit Discipline IGSPS049	8-112
8.10.14	Setting Up Unit Fields of Study IGSPS074	8-114
8.10.15	Setting Up Program Unit Levels IGSPS050	8-116
8.10.16	Setting Up Sub-Unit Relationships IGSPS051	8-118
8.10.17	Setting Up Unit Categorizations IGSPS052	8-120
8.10.18	Setting Up Unit Reference Codes IGSPS053	8-122
8.10.19	Setting Up Unit Subtitles IGSPS109.....	8-124
8.10.20	Setting Up UK Statistics IGSHE014- Unit Tab	8-125
8.10.21	Setting Up Unit Locations and Facilities IGSPS081	8-127
8.10.22	Setting Up Curriculum Units IGSPS104	8-128

8.10.23	Setting Up Unit Version Notes IGSPS054.....	8-128
8.10.24	Setting Up Text Notes IGSGE004.....	8-130
8.11	Unit Offering	8-131
8.11.1	Setting Up Unit Offering IGSPS055	8-131
8.11.2	Setting Up Unit Offering Pattern Notes IGSPS057	8-133
8.11.3	Setting Up Unit Offering Text Notes IGSPS056	8-135
8.11.4	Setting Up Text Notes IGSGE004.....	8-137
8.12	Unit Section	8-138
8.12.1	Setting Up Unit Sections IGSPS058.....	8-141
8.12.2	Setting Up Unit Section Grading Schemas IGSPS082	8-144
8.12.3	Setting Up Teaching Responsibility Override IGSPS059.....	8-145
8.12.4	Setting Up Unit Section Details IGSPS083.....	8-147
8.12.5	Setting Up Unit Section Credits Points IGSPS086	8-153
8.12.6	Setting Up Unit Section Reference Codes IGSPS091	8-155
8.12.7	Setting Up Unit Section Notes IGSPS060.....	8-156
8.12.8	Setting Up Unit Section Text Notes IGSGE004	8-158
8.12.9	Setting Up Unit Section Categorizations IGSPS103	8-158
8.12.10	Setting Up Unscheduled Contact Lists IGSPS118	8-161
8.13	Unit Section Occurrence	8-162
8.13.1	Setting Up Unit Section Occurrence IGSPS084	8-163
8.13.2	Setting Up Unit Section Occurrences Facilities IGSPS114.....	8-170
8.13.3	Setting Up Media and Equipment IGSPS080	8-171
8.14	Unit Section Teaching Responsibility IGSPS116.....	8-172
8.15	Program Annual Loads	8-174
8.15.1	Setting Up Program Annual Load IGSPS025	8-175
8.16	Unit Sets	8-176
8.16.1	Setting Up Unit Set Categories IGSPS063.....	8-183
8.16.2	Setting Up Unit Set Statuses IGSPS064	8-184
8.16.3	Setting Up Basic Unit Set Details IGSPS065	8-185
8.16.4	Setting Up Unit Set Rules IGSPS068.....	8-189
8.16.5	Setting Up Unit Set Notes IGSPS067	8-191
8.16.6	Setting Up Unit Set Text Notes IGSGE004.....	8-192
8.16.7	Applying Unit Sets to Program Offerings IGSPS066	8-193
8.16.8	Setting Up Program Offering Unit Sets IGSPS020.....	8-195
8.16.9	Setting Up Program Offering Unit Set Relationships IGSPS021	8-197

8.16.10	Setting Up Program Offering Option Unit Sets IGSPS022.....	8-198
8.16.11	Setting Up Program Offering Option Unit Set HESA Details	8-200
8.17	Pattern of Study	8-203
8.17.1	Setting Up Program Offering Patterns IGSPS037.....	8-203
8.17.2	Setting Up Program Offering Pattern Notes IGSPS038.....	8-206
8.17.3	Setting Up Text Notes IGSGE004.....	8-208
8.17.4	Setting Up Patterns of Study IGSPS034	8-209
8.17.5	Setting Up Program Pattern of Studies IGSPS035.....	8-213
8.18	Program Offering Option.....	8-217
8.18.1	Setting Up Program Offering Options IGSPS032	8-218
8.18.2	Setting Up Program Entry Point Reference Codes IGSPS033.....	8-221
8.18.3	Setting Up Program Offering Option Notes IGSPS036	8-224
8.18.4	Setting Up Text Notes IGSGE004.....	8-226
8.18.5	Setting Up Program Offering Option Admission Categories IGSPS030.....	8-227
8.19	Cross Listed and Meet With Unit Sections	8-229
8.19.1	Setting Up Unit Cross-Listing Group IGSPS112.....	8-229
8.19.2	Setting Up Unit Section Cross-Listed Group IGSPS113	8-231
8.19.3	Setting Up Meet with Classes IGSPS110.....	8-233
8.19.4	Setting Up Meet with Exams Group IGSPS111	8-234
8.20	Rules	8-235
8.20.1	Program Version Rules.....	8-235
8.20.1.1	Setting Up Program Version Rules IGSPS039	8-245
8.20.2	Program Stage Rules.....	8-246
8.20.2.1	Setting Up Program Stage Rules.....	8-262
8.20.3	Unit Version Rules	8-263
8.20.3.1	Setting Up Unit Version Rules IGSPS061	8-268
8.20.4	Unit Set Rules.....	8-269
8.20.5	Unit Section Version Rules	8-277
8.20.5.1	Setting Up Unit Section Version Rules	8-277

9 Inquiry

9.1	Oracle Student System Inquiries.....	9-1
9.2	Setting Profile Options.....	9-2
9.3	Setting Up Descriptive Flexfields.....	9-2
9.4	Setting Up Inquiry Process Details	9-3

9.4.1	Setting Up Inquiry Package Items	9-3
9.4.2	Setting Up Inquiry Information Type and Inquiry Type Package Items	9-4
9.4.2.1	Setting Up Inquiry Information Type	9-4
9.4.2.2	Setting Up Inquiry Information Type Package Items	9-5
9.4.3	Setting Up Inquiry Entry Statuses	9-6
9.4.3.1	Setting Up Inquiry Entry Status Organizational Units	9-7
9.4.3.2	Configuring Self-Service Inquiry	9-8
9.4.3.3	Inquiry Entry Status Self Reported Test Types	9-9
9.4.3.4	Setting Up Inquiry Programs	9-10
9.4.3.5	Setting Up Inquiry Unit Sets	9-11
9.4.4	Setting Up Inquiry Entry Levels	9-12
9.4.5	Setting Up Inquiry Package Item Reduction	9-13
9.4.6	Setting Up Inquiry Detail Codes	9-14
9.4.7	Setting Up Inquiry Characteristic Types	9-15
9.4.8	Setting Up Inquiry Methods	9-16
9.4.9	Setting Up Inquiry Statuses	9-17

10 Admissions

10.1	Admissions Overview	10-1
10.2	Application and Government Codes	10-1
10.2.1	Setting Up Government Basis for Admission Types IGSST009	10-1
10.2.2	Setting Up Basis for Admission Types IGSAD002	10-2
10.2.3	Setting Up Government Admission Codes IGSAD004	10-3
10.2.4	Setting Up Admission Codes IGSAD003	10-4
10.3	Admission Intake Targets	10-5
10.3.1	Setting Up Student Target Types IGSAD039	10-5
10.3.2	Setting Up Submission Intake Targets IGSAD040	10-7
10.3.3	Setting Up Organizational Unit Student Targets IGSAD041	10-8
10.3.3.1	Setting Up Organizational Unit Funding Source Program Type Group	10-10
10.3.3.2	Setting Up Organizational Unit Funding Source Attendance Mode	10-12
10.3.3.3	Setting Up Organizational Unit Funding Source Unit Internal Program Level	10-14
10.3.4	Setting Up Program Student Targets IGSAD042	10-16

10.4	Secondary and Tertiary Education Details.....	10-18
10.4.1	Setting Up Secondary Education Schools Codes IGSAD014.....	10-18
10.4.2	Setting Up Government Levels of Qualification IGSAD019.....	10-19
10.4.3	Setting Up Tertiary Education Level of Qualification IGSAD015	10-20
10.4.4	Setting Up Government Levels of Completion IGSAD020.....	10-22
10.4.5	Setting Up Tertiary Education Level of Completion IGSAD016.....	10-23
10.4.6	Setting Up Government Secondary Assessment Types IGSAD023.....	10-24
10.4.7	Setting Up Secondary Education Assessment Types IGSAD021	10-25
10.4.8	Setting Up Assessment Type Government Score Mapping IGSAD022	10-26
10.4.9	Setting Up Overseas Secondary Education Qualification IGSAD024	10-28
10.5	Admission Application Processing.....	10-29
10.5.1	Setting Up Admission Categories IGSAD036	10-32
10.5.1.1	Mapping Payment Options to Admission Category	10-34
10.5.1.2	Mapping Fee Categories to Admission Categories.....	10-35
10.5.1.3	Setting up Admission Category Program Type Restrictions	10-35
10.5.1.4	Mapping Enrollment Categories to Admission Categories.....	10-36
10.5.2	Setting Up Admission Process Category Detail IGSAD037.....	10-37
10.5.3	Setting Up Admission Process Category Tracking Rules IGSAD037.....	10-42
10.6	Admission Application Types.....	10-44
10.6.1	Setting Up Admission Application Types IGSAD085	10-44
10.6.2	Setting Up Application Fees for Application Types	10-46
10.6.3	Setting Up Self-Service Pages.....	10-47
10.6.4	Setting Up Self Service Requirements for Personal Statements	10-48
10.6.5	Setting Up Group Requirements.....	10-50
10.7	Calendar Date Aliases for Admission System Processes	10-51
10.7.1	Setting Up Admission Period Calendars IGSAD043	10-51
10.7.2	Setting Up Admission Period Date Overrides IGSAD044	10-56
10.7.3	Setting Up Admission Calendar Configuration IGSAD018	10-59
10.7.4	Mapping Admission Calendar Configuration IGSAD018.....	10-61
10.8	Admission Application Codes	10-63
10.8.1	Setting Up Application Detail Codes IGSAD058	10-63
10.8.2	Setting Up Rating Scales IGSAD059.....	10-64
10.8.3	Setting Up Personal Statement Types IGSAD086	10-65
10.8.4	Setting Up Applicant Goals IGSAD058	10-66
10.8.5	Setting Up Credential Ratings IGSAD058	10-67

10.8.6	Setting Up Admission Credential Types IGSAD066.....	10-68
10.8.7	Setting Up Interests IGSAD058	10-69
10.8.8	Setting Up Probability Details IGSAD058	10-70
10.8.9	Setting Up School Applying To IGSAD082	10-71
10.8.10	Setting Up Admission Application Note Types IGSAD067.....	10-72
10.9	Transcripts and Grade Conversion.....	10-73
10.9.1	Setting Up Transcript Information IGSAD058.....	10-73
10.9.2	Setting Up Grade Conversion Details IGSAD068.....	10-74
10.10	Application Types and Fee Information	10-75
10.10.1	Setting Up Application Types IGSAD085.....	10-75
10.10.1.1	Setting Up Admission Enrollment Deposit Level Details IGSAD058	10-76
10.10.2	Setting Up Application Fee Information IGSAD058.....	10-77
10.10.3	Setting Up Admission Fee Statuses IGSAD006.....	10-78
10.11	Test Results.....	10-79
10.11.1	Setting Up Admission Test Types IGSAD025	10-80
10.11.2	Setting Up Admission Test Segments	10-81
10.11.3	Setting Up Admission Test Result Information IGSAD058	10-83
10.12	Application for Review.....	10-83
10.12.1	Setting up Application Review Profiles IGSAD089	10-84
10.12.1.1	Setting Up Review Groups for a Review Profile	10-86
10.12.1.2	Assigning Evaluators to a Review Group	10-89
10.13	Import.....	10-91
10.13.1	Setting Up Source Categories IGSAD055.....	10-92
10.14	Application Statuses.....	10-96
10.14.1	Setting Up Application Processing Statuses IGSAD005	10-96
10.14.2	Setting Up Admission Entry Qualification Statuses IGSAD007.....	10-97
10.14.3	Setting Up Admission Unit Outcome Statuses IGSAD008	10-98
10.14.4	Setting Up Application Completion Statuses IGSAD009.....	10-99
10.14.5	Setting Up Admissions Outcome Statuses IGSAD010.....	10-100
10.14.6	Setting Up Admissions Conditional Offer Statuses IGSAD011	10-101
10.14.7	Setting Up Admission Offer Response Statuses IGSAD012	10-103
10.14.8	Setting Up Admission Offer Deferment Statuses IGSAD013	10-104
10.15	Unit Placement.....	10-105
10.15.1	Setting Up Unit Placements IGSAD060	10-106
10.16	Admissions Profile Options.....	10-107

10.17	HESA Reference Data	10-107
10.18	Admissions Correspondence.....	10-108
10.19	Admissions Rules	10-108

11 Enrollments

11.1	Enrollments Overview.....	11-1
11.2	Enrollment Profile Options.....	11-5
11.3	Government Contributions.....	11-5
11.3.1	Setting Up Government Contribution Payments IGSSEN006.....	11-5
11.3.2	Setting Up Contribution Payment Options IGSSEN007.....	11-7
11.4	Completion Dates.....	11-9
11.4.1	Setting Up Nominated Completion Periods IGSSEN073.....	11-9
11.5	Notes	11-10
11.5.1	Setting Up Enrollment Note Types IGSSEN021	11-10
11.6	Enrollment Categories	11-11
11.6.1	Setting Up Enrollment Method Types IGSSEN015	11-12
11.6.2	Setting Up Enrollment Category Procedure Details IGSSEN010.....	11-12
11.7	Enrollment in Program Attempts	11-18
11.7.1	Setting Up Intermission Types IGSSEN068.....	11-18
11.8	Enrollment Timeframes.....	11-19
11.8.1	Setting Up Enrollment Calendar Configuration IGSSEN016	11-19
11.8.2	Setting Up Non-Standard Unit Section Enrollment Deadlines IGSSEN053.....	11-24
11.8.3	Setting Up Administrative Unit Statuses IGSSEN001	11-27
11.8.4	Setting Up Unit Discontinuation Date Criteria IGSSEN008	11-30
11.8.5	Setting Up Non-Standard Unit Section Discontinuation Deadlines IGSSEN054	11-34
11.8.6	Setting Up Discontinuation Deadline Date Offset Constraints IGSSEN056.....	11-36
11.8.7	Setting Up Discontinuation Reason Codes IGSSEN017	11-37
11.8.8	Setting Up Enrollment Deadline Calculations IGSPS101	11-39
11.9	Enrollment Unit Load.....	11-44
11.9.1	Maintaining Load Calendar Structure IGSSEN019.....	11-44
11.9.2	Setting Up Government Snapshot Control IGSSST018	11-46
11.10	Credit Point Overrides.....	11-48
11.10.1	Configuring Enrollment Credit Points IGSSEN075	11-48
11.10.2	Setting Up Person ID Group Validations IGSSEN077	11-50
11.11	Repeat Processing.....	11-51

11.11.1	Setting Up Repeat Process Configuration IGSOR032	11-51
11.11.2	Setting Up Unit Repeat Families IGSPS107	11-54
11.11.3	Setting Up Unit Repeat Conditions IGSPS078	11-55
11.11.4	Setting Up Unit Section Repeat Conditions IGSPS089	11-57
11.12	Reserved Seating.....	11-59
11.12.1	Setting Up Organizational Unit Reserved Seating IGSPS105	11-59
11.12.2	Setting Up Unit Offering Pattern Reserved Seating IGSPS106.....	11-61
11.12.3	Enrollment Limits, Waitlist, and Reserved Seating IGSPS085.....	11-63
11.13	Waitlist	11-63
11.13.1	Setting Up Institution Waitlist Options IGSEN045	11-65
11.13.2	Setting Up Organizational Unit Waitlist Setup IGSEN046	11-67
11.13.3	Setting Up Unit Offering Pattern Waitlist IGSPS075	11-71
11.13.4	Enrollment Limits, Waitlist and Reserved Seating IGSPS085.....	11-73
11.14	Enrollment Validations.....	11-76
11.14.1	Setting Up Enrollment Category Validation Setup IGSEN058.....	11-78
11.15	Additional Information for Pre-Enrollment Configuration	11-81
11.15.1	Setting Up Unit Set Pre-Enrollment Configuration IGSPS124.....	11-81
11.16	Self-Service.....	11-82
11.16.1	Self-Service Enrollment Setup IGSEN063	11-82
11.16.2	Self Service User Activity Setup IGSEN057.....	11-84
11.17	Timeslots	11-87
11.17.1	Setting Up Timeslot Calendar Configuration IGSEN052	11-87
11.17.2	Setting Up Timeslot Setup IGSEN048	11-88
11.18	National Student Clearinghouse	11-91
11.18.1	National Student Clearinghouse Configuration IGSEN074.....	11-91
11.19	HESA Reference Data	11-93

12 Records: Advanced Standing

12.1	Advanced Standing.....	12-1
12.1.1	Setting Up Advanced Standing Configuration Details IGSAV001	12-4
12.1.2	Setting Up System Advanced Standing Types IGSAV002.....	12-5

13 Records: Academic Statistics

13.1	Academic Statistics.....	13-1
13.2	Class Standing.....	13-2

13.2.1	Setting Up Class Standing IGSPR015	13-2
13.2.2	Setting Up Class Standing Schedules IGSPR016	13-3
13.3	Career/Program/Unit Relationship	13-5
13.3.1	Setting Up Program / Unit Relationships IGSPS123	13-6
13.4	Academic Statistics Calculation	13-7
13.4.1	Setting Up Student Statistic Types IGSPR018	13-7
13.4.2	Setting Up Institution Statistic Type Configuration IGSPR019	13-8
13.5	Organizational Unit Level Calculation	13-10
13.5.1	Setting Up Organizational Unit Statistic Type Configuration IGSPR020	13-10
13.6	Class Ranking.....	13-12
13.6.1	Setting Up Class Rank Cohorts IGSPR024	13-12

14 Records: Assessments

14.1	Assessments	14-1
14.2	Attendance	14-4
14.2.1	Setting Up Attendance Entry Configuration IGSAS033	14-5
14.2.2	Setting Up Unit Credit Points and Hours - Claimable Hours IGSPS047	14-6
14.2.3	Setting Up Unit Section Credit Points - Claimable Hours IGSPS086	14-7
14.3	Grading Schemas.....	14-8
14.3.1	Setting Up Grading Schemas IGSAS025	14-12
14.3.1.1	Define Grading Schemas for UK Functionality	14-13
14.3.2	Setting Up Grading Schema Grade Translations IGSAS026	14-17
14.3.2.1	Define Grading Schema Mappings for UK Functionality.....	14-18
14.4	Assessment Items	14-22
14.4.1	Setting Up Assessment Types IGSAS001.....	14-25
14.4.2	Setting Up Examination Material Types IGSAS003	14-26
14.4.3	Setting Up Assessor Types IGSAS004.....	14-27
14.4.4	Setting Up Approved Assessment Item Grading Schema IGSAS037	14-28
14.4.5	Setting Up Assessment Items IGSAS009	14-30
14.4.6	Setting Up Assessment Item Examination Materials IGSAS010	14-35
14.4.7	Setting Up Unit Assessment Patterns IGSAS013.....	14-36
14.4.8	Setting Up Unit Assessment Items IGSAS011.....	14-42
14.4.9	Setting Up Unit Section Assessments IGSPS090.....	14-47
14.4.10	Setting Up Unit Section Assessment Items IGSPS092	14-49
14.5	Student Unit Attempt Outcomes	14-52

14.5.1	Setting Up Assessment Calendar Configuration IGSAS008	14-53
14.5.2	Setting Up Mark/Grade Entry Configuration IGSAS005	14-55
14.5.3	Setting Up Incomplete Grade Conversion IGSAS034	14-60
14.5.4	Setting Up Anonymous Grading Method IGSAS038.....	14-61
14.6	Special Consideration for Students.....	14-64
14.6.1	Setting Up Special Consideration Categories IGSAS006.....	14-64
14.6.2	Setting Up Special Consideration for Outcomes IGSAS007.....	14-65
14.7	Examination Timetable	14-66
14.7.1	Setting Up Examination Supervisor Types IGSAS002.....	14-66
14.7.2	Setting Up Venues	14-67
14.7.3	Setting Up Venue Session Availability IGSAS019.....	14-67
14.7.4	Setting Up Examination Supervisor Details IGSAS020	14-70
14.7.5	Setting Up Examination Sessions IGSAS021	14-72
14.7.6	Setting Up Supervisors to Venue IGSAS022	14-73

15 Records: Progression

15.1	Progression Configuration	15-1
15.1.1	Setting Up System Progression Configuration IGSPR002.....	15-4
15.1.2	Setting Up Program Version Progression Configuration IGSPR003	15-8
15.1.3	Setting Up Progression Outcome Types IGSPR008.....	15-12
15.1.4	Organizational Unit Progression Configurations.....	15-16
15.1.5	Setting Up Progression Rule Categories IGSPR001	15-20
15.2	Setting Up Progression Rules IGSPR006.....	15-22
15.3	Setting Up Progression Rule Applications IGSPR007.....	15-24
15.3.1	Assigning a Progression Calendar.....	15-28
15.3.2	Setting Up Progression Rule Outcome IGSPR009	15-30
15.4	Progression Rules Options	15-36
15.4.1	Calculations	15-49
15.4.2	Calculating Show Cause or Appeal Expiration Dates	15-53
15.4.2.1	Calculating Expiration Dates.....	15-54

16 Records: Graduation

16.1	Graduation Configuration.....	16-1
16.1.1	Setting Up Graduand Status IGSGR001	16-6
16.1.2	Setting Up Graduand Approval Statuses IGSGR002	16-7

16.1.3	Setting Up Government Honors Levels IGST013.....	16-8
16.1.4	Setting Up Honors Levels IGSGR005	16-9
16.1.5	Setting Up Credential Types IGSGR004	16-11
16.1.6	Setting Up Measurements IGSGR006.....	16-12
16.1.7	Setting Up Graduation Note Types IGSGR003.....	16-13
16.1.8	Setting Up Venues.....	16-13
16.2	Graduation Ceremonies	16-14
16.2.1	Setting Up Graduation Ceremony IGSGR007.....	16-14
16.2.2	Setting Up Graduation Ceremony Notes IGSGR010	16-17
16.2.3	Setting Up Award Ceremony IGSGR008.....	16-18
16.2.4	Setting Up Unit Set Ceremony IGSGR009.....	16-20

17 Records: Order Documents

17.1	Order Documents Configuration.....	17-1
17.1.1	Setting Up Delivery Method Types IGSAS066	17-1
17.1.2	Order Document Lookups.....	17-2
17.1.3	Document Request Processing Setup IGSAS067	17-3

18 Student Finance

18.1	Student Finance Overview.....	18-1
18.2	Student Finance Profile Options	18-2
18.3	Student Finance Options	18-3
18.3.1	Setting Up System Options - Header IGSFI037	18-3
18.3.1.1	Oracle General Ledger	18-3
18.3.1.2	Accounting Method	18-4
18.3.1.3	Fee Calculation Method	18-4
18.3.1.4	Name.....	18-12
18.3.1.5	Currency.....	18-12
18.3.1.6	Next Number	18-12
18.3.1.7	Include Planned Credits.....	18-12
18.3.2	Setting Up Fee Posting Accounts IGSFI004.....	18-15
18.3.3	Setting Up Account Hierarchy IGSFI057	18-16
18.3.4	Setting Up System Options - Tabs IGSFI037	18-18
18.3.4.1	Refunds.....	18-18
18.3.4.2	Calendar Configuration	18-19

18.3.4.3	GL Accounts.....	18-20
18.3.4.4	Revenue Segments	18-20
18.3.4.5	Receivable Defaults.....	18-20
18.3.4.6	Lockbox.....	18-20
18.4	Revenue Accounting.....	18-21
18.4.1	Setting Up Program Accounts IGSFI059.....	18-21
18.4.2	Setting Up Unit Accounts IGSFI060	18-23
18.4.3	Setting Up Unit Section Accounts IGSFI061.....	18-24
18.4.4	Setting Up Organization Accounts IGSFI062.....	18-26
18.4.5	Setting Up Location Accounts IGSFI063.....	18-27
18.5	Fee Structure.....	18-28
18.6	Setting Up Fee Structures - Overall Procedure	18-42
18.7	Setting Up Fee Structure Statuses IGSFI001	18-43
18.8	Setting Up Fee Types IGSFI012	18-44
18.8.1	Setting Up Fee Type Calendar Instances IGSFI012	18-46
18.8.1.1	Setting Up Fee Assessment Rates - Fee Type IGSFI021.....	18-47
18.8.1.2	Setting Up Fee Type Accounts IGSFI064.....	18-51
18.8.1.3	Setting Up Ancillary Segments IGSFI039	18-53
18.8.1.4	Setting Up Retention Schedules - Fee Type IGSFI024	18-55
18.8.1.5	Setting Up Element Ranges - Fee Type IGSFI020.....	18-60
18.9	Setting Up Fee Category Calendar Instance IGSFI019.....	18-65
18.9.1	Setting Up Retention Schedules - Fee Category IGSFI024	18-68
18.9.2	Setting Up Fee Category Fee Liabilities	18-71
18.9.2.1	Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024	18-74
18.9.2.2	Setting Up Fee Triggers.....	18-74
18.9.2.3	Setting Up Fee Assessment Rates - Fee Category IGSFI021.....	18-96
18.9.2.4	Setting Up Element Ranges - Fee Category IGSFI020.....	18-98
18.10	Credits.....	18-101
18.10.1	Setting Up Credit Type IGSFI050.....	18-103
18.11	Application Rules	18-105
18.11.1	Setting Up Application Hierarchies IGSFI053	18-105
18.12	Balance Rules.....	18-106
18.12.1	Setting Up Balance Rules IGSFI044	18-106
18.13	Hold Plans IGSFI068.....	18-107
18.13.1	Setting Up Holds Plans.....	18-109

18.14	Setting Up Finance and Late Charges IGSFI067	18-110
18.15	Refund Tolerance Limits	18-113
18.15.1	Setting Up Refund Tolerance Limits IGSFI065	18-113
18.16	Sponsorships	18-114
18.16.1	Setting Up Sponsorship	18-115
18.17	Accounting Period Statuses	18-116
18.17.1	Setting Up Open/Close Accounting Periods IGSFI071	18-116

19 Research

19.1	Research Overview	19-1
19.2	Research Candidacy	19-10
19.2.1	Setting Up Milestone Types IGSRE001	19-10
19.2.2	Setting Up Research Supervisor Types IGSRE002	19-11
19.2.3	Setting Up Thesis Panel Types IGSRE003	19-12
19.2.4	Setting Up Thesis Examination Types IGSRE004	19-13
19.2.5	Setting Up Thesis Panel Member Types IGSRE005	19-14
19.2.6	Setting Up Scholarship Types IGSRE006	19-15
19.2.7	Setting Up Thesis Result Codes IGSRE007	19-16
19.2.8	Setting Up Government Socio-Economic Classifications IGSRE008	19-17
19.2.9	Setting Up Socio-Economic Classifications IGSRE009	19-18
19.2.10	Setting Up Government Activity Classification Codes IGSRE010	19-19
19.2.11	Setting Up Milestone Statuses IGSRE011	19-20
19.3	Setting Up Research Milestones IGSRE014	19-21
19.3.1	Research Calendar Configuration IGSRE012	19-22

20 Financial Aid

20.1	Financial Aid Overview	20-1
20.2	Financial Aid Profile Options	20-1
20.3	Financial Aid Options	20-1
20.3.1	Setting Up Financial Aid Office IGFAP017	20-1
20.3.2	Setting Up System Award Year Mapping IGFAP018	20-3
20.3.3	Setting Up Record Matching Criteria IGFAP023	20-5
20.3.4	Setting Up Application Processing Import Parameters IGFAP002	20-6
20.3.5	Setting Up Data Change Workflow Attribute IGFAP031	20-7
20.3.6	Setting Up Institutional Applications IGFAP010	20-7

20.3.7	Setting Up External Term Mapping IGFAW020.....	20-9
20.4	To Do Item Tracking	20-9
20.4.1	Setting Up To Do Items IGFAW027	20-10
20.4.2	Financial Aid Lookup Values for To Do Item Details.....	20-11
20.5	Pell	20-12
20.5.1	Pell Origination.....	20-13
20.5.2	Setting Up Pell Setup IGFG003	20-14
20.5.3	Setting Up Pell Regular Schedule IGFG006	20-16
20.5.4	Setting Up Pell Alternate Schedule IGFG008	20-18
20.5.5	Setting Up Low Tuition and Fees Codes IGFG009	20-20
20.5.6	Setting Up Financial Aid Attendance Type Mapping IGFAW032	20-21
20.6	FFELP and Alternative Loans.....	20-23
20.6.1	Setting Up Lender Codes IGFSL001	20-24
20.6.2	Setting Up Guarantor Codes IGFSL002	20-25
20.6.3	Setting Up Servicer Codes IGFSL010	20-26
20.6.4	Setting Up Lender Relationships IGFSL011	20-26
20.6.5	Setting Up FFELP Setup IGFSL004	20-28
20.7	Setting Up Direct Loans Setup IGFSL003	20-29
20.8	Stafford Loan Limits.....	20-30
20.8.1	Setting Up Federal Stafford Loan Limits IGFAW021.....	20-30
20.8.2	Setting Up Financial Aid Grade Level Mapping IGFAW033	20-31
20.9	Award Processing.....	20-33
20.9.1	Setting Up Fund Type IGFAW008.....	20-34
20.9.2	Setting Up Fund Codes IGFAW009.....	20-34
20.10	Setting Up Fund Manager IGFAW010	20-35
20.10.0.1	Setting Up Pays Only Fee Classes.....	20-43
20.10.0.2	Setting Up Fund To Do Items.....	20-44
20.10.0.3	Setting Up Pays Only Programs	20-45
20.10.0.4	Setting Up Pays Only Units	20-46
20.10.0.5	Setting Up Fund Term Installments	20-47
20.10.0.6	Setting Up Award Revision Reasons	20-49
20.11	Satisfactory Academic Progress	20-49
20.12	Cost of Attendance	20-50
20.12.1	Setting Up Cost of Attendance Items	20-50
20.12.2	Setting Up Cost of Attendance Groups.....	20-50

20.12.3	Setting Up Item Distribution	20-52
20.13	Award Packaging	20-54
20.13.1	Setting Up Award Groups	20-54
20.14	Rollover Fund Attributes	20-56
20.14.1	Setting Up Fund Calendar Relations IGFAW018	20-56
20.14.2	Setting Up Fund Rollover Process	20-57

21 UCAS

21.1	Universities and Colleges Admissions Services Overview	21-1
21.2	UCAS Profile Options	21-2
21.3	Setting Up Definition of System Details	21-2
21.4	Define the Current Institution	21-4
21.5	Setting Up UCAS Interface	21-4
21.6	Import UCAS Reference Data	21-8
21.6.1	Import UCAS Reference Data	21-9
21.6.1.1	Import UCAS Reference and Common Data	21-9
21.6.2	Load GTTR Degree Subjects	21-10
21.6.3	Load Small Systems Institutions	21-10
21.6.4	Load Small Systems Error Codes	21-11
21.7	Setting Up Control Details for Small Systems	21-11
21.8	UCAS Decision/Reply Code Mappings	21-14
21.8.1	Map UCAS Residential Category to Oracle Student System Person Residency	21-17
21.8.2	Mapping UCAS Previous Education Codes to Oracle Student System Codes	21-18

22 HESA

22.1	Higher Education Statistics Agency Overview	22-1
22.2	Define HESA Reference Codes	22-2
22.3	Define Mapping Between HESA Reference Codes and Oracle Student System Codes	22-3
22.4	Codes and Mappings	22-6
22.4.1	Define HESA Reference Data Common to All Institutions	22-6
22.4.2	Define HESA Reference Data Specific to All English Institutions	22-10

22.4.3	Define HESA Reference Data Specific to English Institutions Reporting FE Students. 22-11	
22.4.4	Define HESA Reference Data Specific to English Institutions Reporting Teacher Training Students 22-12	
22.4.5	Define HESA Reference Data Specific to Welsh Institutions.....	22-13
22.4.6	Define HESA Reference Data Specific to Welsh Institutions Reporting FE Students... 22-14	
22.4.7	Define HESA Reference Data Specific to Welsh Institutions Reporting Teacher Training Students 22-15	
22.4.8	Define HESA Reference Data Specific to Northern Irish Institutions	22-16
22.4.9	Define HESA Reference Data Specific to Northern Irish Institutions Reporting Teacher Training Students 22-16	
22.4.10	Define HESA Reference Data Specific to Scottish Institutions Reporting Teacher Training Students 22-17	
22.5	Map UCAS, Oracle Student System, and HESA Reference Data	22-18
22.6	Define Reference Data for deriving HESA Combined and Student return fields 76 and 77 PGCESBJ and PGCECLSS 22-19	
22.7	Define Reference Data for deriving HESA Combined and Student return field 66 FEEELIG 22-19	
22.8	Define Reference Data for deriving HESA Combined and Student return field 31 TTACCOM 22-20	
22.9	Define Reference Data for deriving HESA module return field 6 FTE.....	22-21
22.10	Define Reference Data for deriving HESA Combined and Student return field 65 FUNDCODE 22-22	
22.11	Identify Highest Qualification on Entry Grading Schema	22-22
22.12	Setting Up UCAS Tariff Calculation	22-23
22.12.1	Setting Up UCAS Tariff Calculation Awards	22-26

23 Modifying and Adding Rules

23.1	Rules Overview.....	23-1
23.1.1	Terminology.....	23-1
23.2	Modifying Seeded Rules.....	23-2
23.2.1	Guidelines.....	23-3
23.3	Adding Rules.....	23-4

24 Correspondence

24.1	Correspondence Overview	24-1
24.1.1	Setting Up Correspondence Types	24-2
24.1.2	Setting Up Correspondence Categories	24-3
24.1.3	Setting Up Mapping and Attributes	24-5

25 Setup for Legacy Data Import

25.1	Minimum Requirements	25-1
25.2	Minimum Requirements for PSP	25-2
25.3	Minimum Requirements for Enrollments	25-4
25.4	Minimum Requirements for Records	25-8

26 Degree Audit

26.1	Degree Audit	26-1
------	--------------------	------

27 Implementation Verification

27.1	Calendar Quality Check Exception Report	27-1
27.1.1	Calendar Quality Checks	27-1
27.1.1.1	Load Calendar Checks	27-1
27.1.1.2	Enrollments Calendar Checks	27-3
27.1.1.3	Admission Calendar Checks	27-4
27.1.1.4	Teaching Calendar Checks	27-7
27.1.1.5	Configuration Dates Checks	27-10
27.1.1.6	Award Calendar Checks	27-12
27.2	UCAS Records Importing Verification	27-12

A Oracle Student System Profile Options

A.1	Prerequisites	A-1
A.2	Oracle Student System Profile Options	A-1

B Workflow

B.1	Program Structure and Planning	B-2
B.1.1	Workflows	B-2

B.1.2	There are no workflows in Program Structure and Planning.....	B-2
B.1.3	Business Events.....	B-2
B.2	Person.....	B-3
B.2.1	Workflows.....	B-3
B.2.1.1	Residency Change Workflow.....	B-3
B.2.1.2	Address Change Workflow.....	B-4
B.2.1.3	Generate New User Workflow.....	B-4
B.2.1.4	Set or Release a Hold Workflow.....	B-5
B.2.2	Business Events.....	B-7
B.3	Admissions.....	B-10
B.3.1	Workflows.....	B-10
B.3.1.1	Incomplete Applications Workflow.....	B-10
B.3.1.2	Admissions Requirements Workflow.....	B-11
B.3.1.3	Post Admission Requirements Workflow.....	B-11
B.3.2	Business Events.....	B-12
B.4	Financial Aid.....	B-13
B.4.1	Workflows.....	B-13
B.4.1.1	DLPNA Workflow.....	B-14
B.4.1.2	Corrections Not Initiated By School Workflow.....	B-15
B.4.1.3	OSSDTLS Workflow.....	B-15
B.4.1.4	Student Employment Notification Workflow.....	B-16
B.4.2	Business Events.....	B-16
B.5	Enrollments.....	B-16
B.5.1	Workflows.....	B-16
B.5.2	Business Events.....	B-17
B.6	Academic Records.....	B-19
B.6.1	Workflows.....	B-19
B.6.1.1	Degree Audit Request Workflow.....	B-20
B.6.1.2	Degree Audit Third Party Receipt Workflow.....	B-21
B.6.1.3	Change Grade Request Workflow.....	B-21
B.6.1.4	Grade Submission Workflow.....	B-22
B.6.1.5	Attendance Submission Workflow.....	B-23
B.6.2	Business Events.....	B-24

C Lookups

C.3	Oracle Student System Extensible Lookups.....	C-1
C.4	Oracle Student System User Lookups.....	C-17

D Window Name-Reference Number Guide

D.1	Window Name-Number-Subsystem Reference.....	D-1
-----	---	-----

E Implementation Concurrent Processes

E.1	Implementation Concurrent Processes	E-1
E.1.1	Entering Concurrent Process Text	E-1
E.1.2	Running Concurrent Processes	E-2
E.2	Calendar Concurrent Processes	E-3
E.3	Organization Structure Concurrent Processes.....	E-5
E.4	Program Structure and Planning Concurrent Processes	E-9
E.5	Financial Aid Concurrent Processes.....	E-11
E.6	Admissions Rollover Processes.....	E-12
E.7	Person Concurrent Processes.....	E-14
E.8	Records Concurrent Process Configuration.....	E-15
E.8.1	Configuring Printing to Produce Transcripts	E-15
E.8.1.1	Creating a Driver.....	E-16
E.8.1.2	Creating a Style	E-16
E.8.1.3	Creating a Type	E-16
E.8.1.4	Attaching the Type to the Driver.....	E-17
E.8.1.5	Making changes in APPLSYS.env File.....	E-17
E.8.1.6	Bounce the Concurrent Manager and Form Server	E-18

Glossary

Index

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Oracle Student System Implementation Guide, Release 11i

Part No. B10517-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us at:

Oracle Corporation
Oracle Student System Documentation
500 Oracle Parkway
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11i of the *Oracle Student System Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Student System

If you have never used Oracle Student System, Oracle suggests you attend one or more of the Oracle Student System training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Student System.

Typographic Conventions

The following table lists the typographic conventions used in this manual:

Convention	Meaning
<i>italic text</i>	Book titles
Courier text	User commands and file content examples
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
boldface text	Menu, button, keyboard, and form options Emphasized words or phrases
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any recommendations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Student System.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Student System shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Student System.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Student System (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Student System User's Guide

Use this guide to learn about the concepts and features in Oracle Student System. This includes admitting students, enrolling students, and graduating students.

Oracle Student System for the United Kingdom User's Guide

This guide explains the concepts and features related to Oracle Student System for the United Kingdom functionality available in Oracle Student System. Use this guide to learn about UCAS and HESA functionality.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7

(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Student System with Oracle Applications' Multiple Organization support feature, so you can define and support

different organization structures when running a single installation of Oracle Student System.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Student System implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Student System and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Student System working for you. This team includes your Technical representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Introduction

This chapter provides information on the following topics:

- The Oracle E-Business Suite
- Oracle Student System Implementation Overview

1.1 The Oracle E-Business Suite

The Oracle E-Business Suite is a comprehensive Web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, and servicing through the Internet. The Oracle E-Business Suite consists of front-office customer relationship management (CRM) applications and back-office enterprise resource planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multilayer platform which includes:

- Oracle 9i Database
- Oracle 9i Application Server
- Common Services and Components
- Oracle Internet Business Intelligence

Oracle 9i Database

All applications reside on the Oracle9i Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications (OLTP), query-intensive data warehouses, and high capacity web sites. Because the Oracle database is available on many different platforms, applications can scale

from handheld to laptop to desktop to enterprise providing consistent information over multiple channels.

Oracle 9i Application Server

The Oracle 9i Application Server (Oracle 9iAS) is a middle-tier server which independently delivers the technology needed to build web sites and applications, create personalized portals, extract business intelligence, and manage a secure web site infrastructure.

Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

Oracle Internet Business Intelligence

Above the E-Business Suite sits the Internet Business Intelligence application. This application integrate data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

1.1.1 The Applications in the E-Business Suite

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP). The CRM applications include:

- Oracle Marketing
- Oracle Sales
- Oracle Contracts
- Oracle Service
- Oracle eCommerce

The ERP applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relation Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The Marketing suite provides campaign planning and execution, budget management, list creation, reporting and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service and operations.
- The Sales suite provides integrated tools for all those who are involved in the sales process, including field salespeople, telesales agents, distributors and resellers, customers purchasing over the Internet and sales executives.

Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, managers can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and web storefronts can collaborate in closing more business together as one sales team.

- The Contracts suite enables authoring, executing and managing contracts, warranties and extended warranties which provides visibility to contract entitlements and proactively acting upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.
- The Service suite manages service activities with the goals of profitability, employee productivity and complete customer satisfaction by addressing all service and support activities from initial contact with the customer through

issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

This suite of applications provides customer support, field service and depot repair functionality. In addition, Oracle Services offers complete visibility into spare parts availability, logistics, service billing and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across web, call center and mobile field channels.

- The eCommerce suite of products aids in establishing profitable long-term relationships with customers through one-to-one marketing and personalized shopping experiences as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- Oracle Order Management applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions and flexibility to adapt to changing business conditions.
- Oracle Supply Chain Planning applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- Oracle Manufacturing applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- Oracle Financials provide solutions for strategic planning, accounting, treasury, project management, and travel management.
- Oracle Human Resources Management System is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

The Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, TCA, Oracle's Trading Community Architecture, consists of a database schema and Application Programming

Interfaces (APIs) where you can model the complex relationships that occur within a business community and enter that data consistently throughout the enterprise. Because the model is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation. TCA delivers a 360-degree view of the customer.

1.2 Oracle Student System Implementation Overview

Oracle Student System is part of an e-business suite of software modules that provides educational institutions with an integrated student information management system.

Implementation for the purposes of this guide refers to the entry of setup values into Oracle Student System.

Definition of these setup values occurs during separate analyses that identify the data requirements for all institution processes across all of the Oracle Student System modules. These values need to be determined before beginning the process of entering setup values into Oracle Student System.

The implementation of Oracle Student System begins with the modules that support functionality across multiple Oracle Student System modules. These systemwide modules include:

- Person
- Calendar
- Organizational Structure
- Tracking

The remaining modules are completed in the following order:

- Program Structure and Planning
- Student Recruiting including implementation of related CRM modules and Inquiry
- Admissions
- Enrollment
- Academic Records, which includes Advanced Recruiting, Academic Statistics, Progression, Student Assessments, Graduation, and Order Documents
- Student Finance

- Research
- Financial Aid
- United Kingdom

The Financial Aid module is implemented for sites that participate in the United States federal financial aid programs. The United Kingdom modules are completed by sites participating in the UCAS admission process and reporting to HESA.

Setup for each module is done according to groups of forms that define related functionality. Functionality that is not needed does not need to be set up.

This implementation guide is organized in order of implementation. The chapters containing setup procedures are presented in the order of setup, as are the procedures within the chapters. For the overall setup process and for each of the modules, detailed flows diagrams can be downloaded from the Oracle Metalink Support site.

Note: Window reference numbers have been included with the form name as additional information to describe each form. The window reference number can be found by going to About Oracle on the tool bar and scrolling down the page. It is recommended that until the user is familiar with Oracle Student System, these window reference numbers are confirmed during system setup to ensure that the correct window has been opened.

Note: This implementation guide relates to the setup of a new instance of Oracle Student System. Any setups that are affected as a result of a subsequent system upgrade are discussed in the relevant About Oracle Student System document available on Metalink provided with that release.

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing the Oracle Student System. Topics include:

- Related Documentation
- Mandatory Dependencies
- Conditional Dependencies
- Oracle Student System Tablespaces

2.1 Related Documentation

2.1.1 Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

2.1.2 Related User's Guides

Oracle Student System shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Student System.

You can read the guides online by choosing Library from the expandable menu on the HTML help window, by reading from the Oracle Applications Document

Library CD included in your media pack, or using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from Oracle Store at <http://oraclestore.oracle.com>.

2.1.3 Guides Related to This Product

2.1.3.1 Oracle Student System User's Guide

Use this guide to learn about the concepts and features in Oracle Student System. This includes admitting students, enrolling students, and graduating students.

2.1.3.2 Oracle Student System for the United Kingdom User's Guide

This guide explains the concepts and features related to Oracle Student System for the United Kingdom functionality available in Oracle Student System. Use this guide to learn about UCAS and HESA functionality.

2.1.3.3 Oracle Student System Open Interfaces User's Guide

The *Oracle Student System Open Interfaces User's Guide* provides information on using interface tables to perform the following:

- import data into Oracle Student System
- transfer data within Oracle Student System
- export data from Oracle Student System to another Oracle application or **third-party** software and import the processed data into Oracle Student System

2.2 Mandatory Dependencies

Oracle Student System requires the following related products and components to be installed and implemented:

- Trading Community Architecture
- Oracle Workflow 2.6
- Oracle Financials 11.5.6 or 11.5.7
- Framework 5.6e
- CRM 11.5.6

- Oracle Discoverer

You are required to log in to the following Oracle technology stacks:

- Oracle Application Object Library (AOL), also known as Oracle Forms.
- Oracle E-Business Suite HTML login (JTF login). This is the HTML login that you access from within an Internet browser. Microsoft Internet Explorer 5.5 (with the cookies enabled) is the recommended browser setup for accessing the HTML-based applications.

Oracle Applications come with a seeded (supplied) system administrator login, with which you can access both Forms and the E-Business Suite HTML login. The seeded login is:

- User name: sysadmin
- Password: sysadmin

2.3 Conditional Dependencies

Oracle applications that extend the capabilities of Oracle Student System are considered conditional dependencies. You will need to refer to the product-specific setup and user manuals for complete information. Setting up the optional modules is not required; however, if they are not set up, then the additional functionality provided by these modules will not be available.

- Portal Web Provider
- Oracle Portal 3.0.9.8.2
- Oracle General Ledger
- Oracle Receivables
- Oracle Payables
- Marketing Online (Advanced Option)
- TeleSales
- Web ADI
- Fulfillment Server
- Oracle Human Resource Management Systems
- iPayment

2.4 Oracle Student System Tablespaces

The following tablespaces are used for Oracle Student System:

- IGSX
- IGSD
- IGFX
- IGFD

Other Oracle Applications and Tools

3.1 Application Security

User names and responsibilities are set up in Oracle Applications to secure access to the data and functionality within the applications.

The key element in Oracle Applications security is the definition of responsibility. A responsibility defines the following:

- application database privileges
- an application's functionality that is accessible
- the concurrent processes and reports that are available

The system administrator defines application users and assigns one or more responsibilities to each user.

See Also

For additional information, refer to the following manuals:

- *Oracle Applications System Administrator's Guide*
- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation Concepts and Procedures*.

3.1.1 Defining Oracle Student System Responsibilities

Important: The implementor must have System Administrator access at the instance level to create users and assignment of responsibilities to these users. This security level is set at the instance level during installation of the Oracle E-Business Suite

1. Under the System Administrator responsibility, create users.

- 2. For each user, create one or more responsibilities based on the users' roles and responsibilities.
Note: System Administrator responsibility can be granted to functional users by the technical staff during the installation of the Oracle E-Business Suite.
- 3. Create additional responsibilities and associated menus.

The following table describes the Oracle Student System seeded responsibilities

Table 3–1 Oracle Student System Seeded Responsibilities

Responsibility	Tasks
AK Developer	Define regions in Apps to troubleshoot errors.
Application Developer	Modify self-service messages. Set up descriptive flexfields.
System Administrator	Set profile options Check the status of concurrent processes requests Add and update menus Create responsibilities Create users Define descriptive flexfields and descriptive flexfield segments Define key flexfield segments and key flexfield segment values Define system profile values at the responsibility and site levels Define values sets Implement Function Security
Oracle Student System Super User	Create setup values and initiate transactions across all Oracle Student System modules Access forms from root menu
Financial Aid Super User	Create setup values and initiate transactions for Financial Aid forms only Access forms from Financial Aid menu only

Table 3–1 Oracle Student System Seeded Responsibilities

Responsibility	Tasks
SEVIS Administrator	Initiate SEVIS reports View SEVIS reports
OSS Administrator Self Service	Access from Administrator Self Service home page only
OSS Advisor Self Service	Access from Advisor Self Service home page only
OSS Alumni Self Service	Access from Alumni Self Service home page only
OSS Applicant Self Service	Access from Applicant Self Service home page only
OSS Faculty Self Service	Access from Faculty Self Service home page only
OSS Former Student Self Service	Access from Former Student Self Service home page only
OSS Guest Self Service	Access from Guest Self Service home page only
OSS Recruiter Self Service	Access from Recruiter Self Service home page only
OSS Student Self Service	Access from Student Self Service home page only

3.2 Correspondence Printing

Correspondence is an integral part of interactions with students. Email, print, and fax delivery are available with the setup of CRM Multichannel Delivery Service (1-1 Fulfillment) within Oracle CRM Foundation plus the additional setup discussed in this section.

Oracle CRM Multichannel Delivery Service is an automated way to satisfy a request for information, literature, and correspondence.

Print requests are initiated via a Oracle Student System concurrent process and fulfilled by CRM Multichannel Delivery Service.

See Also

For information on setting up Oracle Foundation, see the *Oracle CRM Application Foundation Implementation Guide*.

For information on setting up the CRM Fulfillment Server, see *Enabling Printing and Faxing via 1-to-1 Fulfillment*.

For information on setting up Captaris Right FAX, see the *Captaris Right FAX Administrator's Guide*.

For information about running concurrent requests to produce letters in Oracle Student System, see the *Oracle Student System User's Guide*.

3.2.1 Prerequisites

Oracle Foundation must be set up.

Oracle 1-1 Fulfillment Server must be installed and running to enable Correspondence functionality.

IGS: Fulfillment Server ID profile option must be defined

IGS: CRM User ID profile option must be defined

RightFAX 8.0 or higher must be installed and its setup must be complete. RightFAX, provided by Captaris, is a comprehensive network fax/print solution for sending and managing faxes and print jobs directly from user desktops.

IGS: Delivery Destination Name profile option value must be the same as the name of the RightFax printers.

3.2.2 Printing

While running a correspondence concurrent process in Oracle Student System for either system-defined or ad hoc letters, users must provide a value for the Destination parameter or provide a value for the profile option IGS: Delivery Destination Name.

If the value of the Delivery Destination Name is PRINT, then Correspondence functionality picks the printer name from the Destination parameter or takes the printer name associated with that particular user at the profile level and passes it to the Oracle 1-1 Fulfillment Server, where it is available to RightFAX to print the letters.

3.3 Flexfields

A flexfield is composed of subfields, or segments. There are two types of flexfields: key and descriptive. Oracle Student System uses descriptive flexfields, which provide customizable expansion space on windows.

The following table describes descriptive flexfields in Oracle Student System.

Table 3–2 Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
HZ_CONTACT_POINTS	Institution/Organizational Unit	Trading Community Architecture
HZ_PARTIES	Institution/Person/Organizational Unit	Trading Community Architecture
IGS_AD_APP_INTENT	Application Intent	Admissions
IGS_AD_PS_APPL_INST_ALL	Program Application Instance	Admissions
IGS_AD_TSTSCR_USED	Admission Test Scores	Admissions
IGS_SS_INQUIRY	Prospective Applicant Inquiry	Admissions
IGS_IN_ENQUIRY_APPL_ALL	Inquiry Instance	Admissions
IGS_SS_APP_PGM_STG_ALL	Self Service Application Details Flexfield	Admissions
IGS_AD_TSTSCR_USED	Test Scores Used	Admissions
IGS_AD_LOCATION_ALL	Locations	Organizational Structure
IGS_AS_ASSESSMNT_ITM_ALL	Assessment Items	Academic Records
IGS_GR_GRADUAND_ALL	Graduand Details	Academic Records
IGS_AS_GRD_SCHEMA	Grading Schemas	Academic Records
IGS_AS_GRD_SCH_GRADE	Grading Schema Grades	Academic Records

Table 3–2 Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_AS_SU_ATMPT_ITM	Unit Attempt Assessment Item	Academic Records
IGS_AS_SU_SETATMPT	Unit Set Attempts	Academic Records
IGS_AS_SU_STMPTOUT_ALL	Student Unit Attempt Outcomes	Academic Records
IGS_DA_CNFG_REQ_TYP	Degree Audit Request Type	Academic Records
IGS_EN_STDNT_PS_ATT_ALL	Student Program Attempt	Enrollments
IGS_EN_STDNT_PS_INTM	Student Program Intermission	Enrollments
IGS_EN_UNIT_SET_ALL	Unit Set Details	Enrollments
IGS_RC_IS_INQUIRY	Prospective Account Inquiry	Inquiry
IGS_RC_I_APPL_ALL	Inquiry Instance	Inquiry
IGS_FI_CREDITS_ALL	Receipts	Student Finance
IGS_FI_CR_TYPES_ALL	Credit Type	Student Finance
IGS_FI_FIN_LT_PLAN	Finance and Late Charge Plan	Student Finance
IGS_FI_IMPCHGS_LINES	External Charges	Student Finance
IGS_FI_IMPCHGS_LINES	Ancillary Charges	Student Finance
IGS_FI_INVLN_INT_ALL	Charge Lines	Student Finance
IGS_FI_REFUNDS	Refunds Descriptive Flexfield	Student Finance
IGS_AW_FUND_MAST	Sponsor Setup	Student Finance
GL_PERIOD_STATUSES	Open / Close Accounting Periods	Student Finance

Table 3–2 Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_PE_ALT_PERS_ID	Person Alternate ID	Person
IGS_AD_TEST_RESULTS	Test Results	Person
IGS_PE_CONTACT_DTLS	Person Email Details	Person
IGS_PE_MIL_SERVICES_ALL	Military Services	Person
IGS_PE_PERS_DISABLT	Person Special Needs	Person
IGS_PE_PERSID_GROUP_ALL	Person ID Group	Person
IGS_PE_RES_DTLS_ALL	Person Residency Details	Person
IGS_PE_STAT_DETAILS	Person Statistics	Person
IGS_PE_IMMU_DTLS	Immunizations	Person
IGS_AD_TST_RSLT_DTLS	Test Result Details	Person
IGS_PE_HLTH_INS_ALL	Health Insurance	Person
IGS_AD_HZ_ACAD_HIST	Academic History	Person / System Wide Services
IGS_AD_INTL_VISA	International Visa Entity Details	Person / System Wide Services
IGS_PS_FAC_WL	Faculty Task Assignment/Override Workload	Program Structure and Planning
IGS_PS_OFR_ALL	Program Offerings	Program Structure and Planning
IGS_PS_OFR_OPT_ALL	Program Offering Options	Program Structure and Planning
IGS_PS_VER_ALL	Basic Program Details	Program Structure and Planning
IGS_PS_USEC_OCCURS_ALL	Unit Section Occurrence Details	Program Structure and Planning
IGS_EN_UNIT_SET_ALL	Unit Set Details	Program Structure and Planning

Table 3–2 Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_PS_UNIT_VER_ALL	Unit Version Details	Program Structure and Planning
IGS_PS_USEC_REF	Unit Section Reference Description	Program Structure and Planning
IGF_AP_FA_BASE_REC_ALL	FA Base Flex	Financial Aid
IGF_AW_AWARD_ALL	Awards Flex	Financial Aid
IGF_AW_FUND_MAST_ALL	Awards Fund Master Flex	Financial Aid
IGF_AW_FUND_MAST_ALL	Sponsor Fund Flexfield	Financial Aid

3.4 Lookups

A lookup type is a category of information such as nationality, address type, and tax type. Lookup values are required to set up Oracle Student System and enable functionality. In Oracle Student System, all lookup types are seeded values.

System lookup types cannot be changed. For extensible and user-defined lookup types, values may or may not have been seeded, and users can create user-specific values.

Lookups provide lists of valid values that can be selected during Oracle Student System transaction processing and data entry. This has two key advantages:

- Ensures that users use the same terminology, which results in consistent information for inquiry and reporting
- Speeds up data entry because users can enter just enough to identify the value and Student System completes the entry

See Also

Refer to Appendix B for detailed information about the extensible and user-definable lookups in Oracle Student System.

For additional information on lookups, see *Configuring, Reporting, and System Administration in HRMS*.

3.4.1 Defining Lookups

Individual setup forms and field(s) depend on specific lookup types related to that setup form. During Oracle Student System implementation, lookup values are defined as part of the setup procedures for the subsystems.

3.5 Oracle CRM Application Foundation

Oracle CRM Application Foundation provides a common infrastructure and set of application components for all of the customer relationship management modules.

The following Foundation component needs to be set up to enable correspondence printing.

- Oracle CRM Multichannel Delivery Service (1-1 Fulfillment)

The following components need to be set up only if Oracle Student System is being used with Oracle Student Recruiting:

- Resource Manager
- Territory Manager
- Interaction Tracking

See Also

Refer to the *Oracle CRM Application Foundation Implementation Guide* for detailed setup information.

3.5.1 Oracle CRM Application Foundation Prerequisites

For Oracle CRM Application Foundation, set up the following responsibilities:

- CRM Administrator
- JTF_FM_Administrator assigned to CRM Administrator

3.5.2 CRM Multichannel Delivery Service (1-1 Fulfillment)

Oracle CRM Multichannel Delivery Service is an automated way to send information, literature, and correspondence. Email, print, and fax delivery are available with CRM Multichannel Delivery Service. (Printing is discussed in "Correspondence Printing" in this chapter.)

3.5.3 Resource Manager

The following Resource Manager components should be set up to use Oracle Student System with Oracle Student recruiting:

- role types
- roles
- resource groups
- resource teams

3.5.3.1 Role Types

A role type identifies a collection of roles. For example, recruiting support personnel such as alumni representatives, administrative support, and recruiters may all have the role type Recruiter.

3.5.3.2 Roles

A resource role may encompass one or more job descriptions and titles. Some examples of roles are Recruiter, Alumni Representative, and Recruiting Manager.

3.5.3.3 Resource Groups

A resource group is normally based on the roles of its members. Groups allow institutions to allocate appropriate resources to a job or task. Institutions can implement several recruiting groups and leverage resources in a variety of ways.

3.5.3.4 Resource Teams

Institutions can define resource teams to organize resources that are needed to accomplish an objective. Institutions can restrict campaigns, events, and prospect data to a team for security purposes. Institutions can impose other restrictions on tasks and alerts.

3.5.4 Territory Manager

Territory Manager can be used for the following recruiting functions when used with Oracle Student System:

- automatically assigning recruiters based on availability, expertise, or location
- creating territories by using territory types to identify multiple territories with similar characteristics, for example, school zones or regions

- restricting access to prospect data

3.5.5 Interaction Tracking

Interaction tracking includes the following items:

- interaction history
- outcomes, results, and codes
- interaction types

3.5.5.1 Interaction History

Implement interaction history to capture and log comprehensive details for all prospect interactions across the institution.

Interaction history acts as a central repository for all contacts, whether over the phone, the Web, or email. Student Recruiting representatives can understand how, when, and why prospects interact with them to optimize relationships and provide consistent service.

3.5.5.2 Outcomes, Results, and Codes

Institutions use the following categories to track the outcomes of interactions:

- outcomes
- results
- reasons

These categories are linked to capture analytical information regarding why a prospect may or may not be interested in an institution, as well as providing performance information about the recruiting representatives.

Outcomes are the outcome of activities by a recruiting representative or other institution personnel responsible for contacting prospects. For example, a recruiting representative might contact a prospect by phone. A sample outcome definition might be Student Contacted.

Results are the results of the outcome. For example, a prospect might indicate interest in the institution and request a Viewbook. The result would be defined as Viewbook Requested.

Reasons are also related to outcomes. A prospect might be interested in an institution because a friend was recently accepted. A sample reason code might be Friend Plans to Attend Institution.

Institutions can use these categories to track why a prospect decides not to attend the institution. For example, the recruiting representative might contact the prospect by phone and the prospect could indicate interest in the institution and receive financial aid information, but decide not to attend the institution because of the cost. The outcome would be Interested in Institution, the result would be Financial Aid Information Sent Out, and the reason would be Cost of Institute.

3.5.5.3 Interaction Types

Interaction types are defined by values for the INTERACTION_TYPE lookup. Interaction types are used to further classify the interaction. Some interaction types could include the following:

- collateral
- event letter
- inbound phone call
- mailed in response
- mail blast
- campus visit
- campus reception
- high school visit

3.6 Oracle Discoverer

Oracle Discoverer creates static (only) and complex SQL queries in Oracle Student System for generating dynamic person ID groups.

The Person ID Group procedure creates and manages groups of people with a characteristic or characteristics in common through the Person ID Group Definition window or by importing a flat file. The data that is stored in Oracle Student System includes:

- group ID
- group code
- workbook name

- worksheet name
- description
- creator person ID
- creation date
- close indicator
- comments
- DFF attributes
- segment sequence ID
- SQL segments

See Also

See *Oracle Discoverer 4i Installation and Administration Guide* for more information.

3.6.1 Oracle Discoverer Implementation Considerations

Oracle Discoverer administrator setup must be complete.

An EUL must be provided.

Register OSS Function in Discoverer.

A function must be registered within Oracle Discoverer Admin by Administrator. The name of the OSS function is `eul_trigger$post_save_document` that will allow storage of static SQL in Oracle Student System tables.

This new function needs to be created as the EUL owner so that others can use the function and take advantage of the dynamic person ID group in Oracle Student System.

For example, Financial Aid users store the dynamic SQL and ID. All Oracle Student System users can then select both static person ID groups and dynamic person ID groups from the list of values in the Financial Aid subsystem.

3.7 Oracle Financials

3.7.1 Oracle General Ledger

Oracle General Ledger can be used to manage Oracle Student System financial transactions. To do this, General Ledger must be implemented as a prerequisite to the Student Finance module

See Also

Refer to the *Oracle General Ledger User's Guide* for information about setting up the Oracle General Ledger.

3.7.2 Oracle Receivables

Oracle Receivables setup is required to support person address validation and lockbox functionality in Oracle Student System.

See Also

Refer to the *Oracle Receivables User's Guide* for information about setting up Oracle Receivables.

3.7.2.1 Person Address Validation

To support person address validation the following minimal setup is required in Oracle Receivables: System Options ARXSYSPA

In the Tax tab, a Location Flexfield Structure must be selected. In addition, the type of address validation needs to be set in the Address Validation field.

The System Options form has many prerequisite setup steps. See the *Oracle Receivables User's Guide* for details.

Note: If Multi-Org is enabled then the operating unit used to set up the system options in Oracle Receivables must match the operating unit used in the Oracle Student System.

3.7.2.2 Student Finance Lockbox

To support lockbox functionality for student finance the following minimal setup will be required in Oracle Receivables: Lockboxes ARXLOBOX.

The Lockboxes form has prerequisite setup steps. See the *Oracle Receivables User's Guide* for details.

Note: If Multi-Org is enabled, then the operating unit used to set up the Lockboxes in Oracle Receivables must match the operating unit used in Oracle Student System.

3.7.3 Oracle Payables

Refund transactions can be sent from Student Finance to Oracle Payables. To do this, Oracle Payables must be implemented as a prerequisite to the Student Finance module.

Note: If Multi-Org is enabled then the operating unit used to perform the setup the in Oracle Receivables must match the operating unit used in the Oracle Student System.

3.8 Oracle Human Resource Management Systems (HRMS)

Oracle Human Resource Management Systems (HRMS) enables you to maintain records for employees and staff.

For Oracle HRMS and Oracle Student System to be synchronized, Oracle Student System person types must be mapped to Oracle Human Resource Management Systems system person types during the setup of Oracle Student System.

No specific setups are required in HRMS to implement Oracle Student System.

See Also

See Mapping to Oracle HRMS Person Types in Chapter 4, "Systemwide Services: Person" of this guide for detailed information.

3.9 Oracle iPayment

Oracle iPayment provides an integrated electronic payment solution for both electronic commerce applications and client-server applications. It provides integrated, user-friendly access, and control of payment processing to these applications. Oracle iPayment supports electronic payment methods for credit card and bank account and debit card transfers.

iPayment integrates with Oracle Student System to provide payment processing for credit card payment via self-service. Oracle Student System does not support bank account and debit card processing.

3.9.1 Prerequisites

IGS_CC_EXP_YEAR profile values have been added for years 2011 and later. This is an extensible lookup with years up to 2010 seeded.

Payment Administrator responsibility is assigned to users responsible for iPayment functionality.

User Default Responsibility is set to Payment Administrator

IGS: Merchant Reference value is set to OSS Merchant at the site level

3.9.2 Setting Up iPayment Lookups

1. Navigate to the iPayment Administrator's page.

Note: If you have only CRM Payment Administrator responsibility, you are automatically directed to the Payment Administrator's window. If you have more than one CRM applications responsibility, perform the following tasks.

2. To add a payment system, click the Payment System tab. The Payment System page appears.
3. Click **Create**. The Create Payment System page appears.
4. In the Name field, enter the name of the payment system you want to add. This name is used in pages generated in iPayment and should be a popularly known name of the payment system.
5. In the Suffix field, enter a three-character suffix for your payment system to use in the iPayment API. This must be unique and lowercase.
6. In the User Name field, enter a user name to be used for authentication by the payment system when basic authentication is set up on the payment system servlet.
7. In the Password field, enter the password for the payment system user name.
8. In the Base URL field, enter the Universal Resource Locator (URL) to invoke the payment system.

Note: The base URL should include a port number if there is one. This generally starts with http://. If this URL is Secure Socket Layer (SSL) enabled, this URL starts with https://.

Note: This field is mandatory for credit card payment instruments.
9. In the Supported Payment System field, select the Credit Card check box.

10. Click **Create**.
11. Save your work.

3.9.3 Setting Up the Default Payment System

1. Navigate to the iPayment Administrator's page. Click the Payment System tab. Click the Default Payment System subtab. The Default Payment System screen appears.
2. In the Select Payment System column, select a default payment system from the drop-down list available. For credit card payment instrument, select Cybercash.
3. Click **Update**.

3.9.4 Creating New Payees

1. Navigate to the iPayment Administrator's page. Click the Payee tab. The Payees and Risk Management page appears.
2. Click **Create**. The New Payee page appears.
3. In the Payee Name field, enter the payee name that appears on the pages and reports generated by iPayment.
Note: This must be unique and is case sensitive.
4. In the Payee Identifier field, enter the payee identifier to identify a particular payee.
Note: The Payment System Identifier is the identifier by which the payee is uniquely known to the payment system. It is provided by the payment vendor. Two payees cannot have the same identifier for one particular payment system. You cannot modify this identifier after saving it. It must be unique and is case sensitive.
5. In the Status check box, select either Active or Inactive. Select Active if you want iPayment to process requests for this merchant. Select Inactive to suspend payment processing for a merchant while maintaining access to the payee's configuration file.
6. In the Accepted Payment Instrument field, enter the appropriate payment instrument of credit card.

3.9.5 Setting Up Routing Rules

1. Navigate to the iPayment Administrator’s page. Click Routing Rule tab. The Routing Rules page appears. Click **Create**. The Create Routing Rule page appears.
2. In the Rule Name field, enter the name of the routing rule.
Note: This name must be one word without spaces and must be unique. The name must contain only alphanumeric characters and underscores.
3. In the Rule Priority field, select a new priority from the drop-down list.
4. In the Status check box, select Active as the status of the routing rule.
5. In the Route to Payment System field, select the payment system to which transactions that satisfy the conditions are routed.
6. In the Rule Condition field, enable at least one rule.
7. In the Amount field, select the desired operation and enter an amount value.
8. In the Currency Type field, select an operation and a currency type.
9. Click **Add Rule Condition**.
10. Click **Update**.

3.9.6 Setting Up Properties for IBY

1. At the System Administrator responsibility, navigate to the Advanced Properties screen.
2. Select IBY from the list of values.
3. Enter the values as described in the table.
4. Verify and correct properties for JTF as described in the table and save your work.

Table 3–3 *IBY and JTF Values*

Property Name	Value
IBY Values	

Table 3–3 IBY and JTF Values

Property Name	Value
debug	<p>True</p> <p>Note: This parameter is optional.</p> <p>If set to true, then the servlet will print debugging information to the body of its responses.</p> <p>This information includes the inputs sent to the servlet during the request, and the outputs the servlet sends for its response.</p> <p>If an exception is thrown during the processing, then a stack trace is also printed.</p>
debugfile	
errorfile	
http_proxy	http://www-proxy.com
iPayment URL	http://<MACHINE NAME>.com:<port>/servlet
no_proxy	proxy name
service.factories	oracle.apps.iby.ecapp.PaymentServiceFactory
service.oracle.apps.iby.ecapp.PaymentServiceFactory.desc	PaymentService.system
JTF Properties	
Guest Username	<p>AOL/J Security Access: Oracle Application User Name.</p> <p>Ask your application DBA for assistance.</p>
Guest Password	<p>AOL/J Security Access: Oracle Application Password.</p> <p>Ask your application DBA for assistance.</p>

3.10 Oracle Portal

Oracle Student System provides two student portlets for My Schedule and My Personal Information and one administration portlet for Role Type Administration.

These portlets provide easy access to student and administrative information through self-service screens.

Oracle Portlets integration is optional.

See Also

For more information, see *Installing Oracle 9i Application Server with Oracle Application 11i*. See also *Configuring Oracle Applications with Oracle Portal*.

3.10.1 Prerequisites for Oracle Portal

If you plan to use Oracle Student System portlets, you must install Oracle Portal 3.0.9.8.2

3.10.2 Setup for Oracle Student System Portlets

When the portal is configured, a Web provider is created. When users want to add portlets to this portal, they use the Web provider. The Web provider displays all the portlets under the menu structure attached to his responsibility. Users can then add one or more portlets. The general procedure is as follow:

1. Create Oracle Student System student and administrator portlets as a WEBPROVIDER function type.
2. Add student portlet to the menu IGS_PT_STUDENT_MENU as a submenu of IGS_SS_STUDENT_MENU
3. Add the administration portlet to the menu IGS_PT_STUDENT_MENU as a submenu of IGS_SS_ADMIN_MENU.

No special configuration is required for the portlet functions. Use the Web provider to add portlets to the portal. The Web provider displays all portlets for the menu structure attached to the responsibility.

3.10.2.1 Users and Roles

System administrators must create users and assign roles to users. Users can be created either from the portal application or from Oracle applications (Oracle Student System, Oracle Human Resource Management Systems). Existing users defined in Oracle applications can be used in portal applications.

The predefined roles such as Administrator, Student, Prospective Student, Faculty and Alumni are available in portal. A default role is assigned to each user. The default roles assigned to the users can be changed by the system administrator.

3.10.2.2 Home Pages

A set of predefined home pages can be assigned to user roles with minimal or no customization. These predefined pages provide baseline home pages that can be customized by administrators.

Each user role is assigned a predefined home page. When users log into the Portal application, they navigate to their default home page.

System administrators can customize any information on the home pages that come seeded with Oracle Student System.

3.10.2.3 Home Page Templates

A template that can be used as a default home page is provided for each role. When a user logs into portal she or he navigates to the default home page.

The following roles have templates available:

- Student
- Faculty
- Administrator/Staff

The following roles will have templates available in a future release:

- Current Students
- Prospective Students

3.10.2.4 Home Page Portlets

Portlets are available in the home page templates for each role.

3.10.2.5 Student Home Page Portlets

The following table describes the portlets available on the Student Home Page template.

Table 3–4 Student Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Student Notifications	Notifications possibly through workflow for the student	N/A	Site specific implementation. Notifications from any Oracle Applications product are displayed here.
My Notes	Personal Notes related to the student	N/A	Site specific implementation. Institutions could create an interface with PDA applications to sync To do's and Notes
Campus Services	Links to campus services	N/A	Site specific implementation
Course Schedule	Abbreviated course schedule	Information comes from Oracle Student System enrollment data.	N/A
My Classifieds	Classified ads posted centrally for the institution	N/A	Site specific implementation
My Finances	Links to Finance related resources at the Institution	Not all links will be to OSS. Financial Aid and Tuition and Fee Schedule links would take the student to appropriate OSS pages that the student has access to.	Most links here are site specific.
My Academics	Links to academic related resources	Most of these links are to Oracle Student System.	N/A

Table 3–4 Student Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
My Activities	Links to activities/current happenings at the institution	N/A	Links here are site specific.

3.10.2.6 Student My Information Tab Portlets

The following table describes the portlets available on the Student My Information tab template.

Table 3–5 Student My Information Tab Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
My Personal Info	This portlet displays student's name, address and contact information.	The information for this display is from Oracle Student System Person module. The user is able to customize the address to be displayed.	N/A
My Advisor	Listing of the student's assigned advisor	N/A	This information is retrieved from an Advising module.
My Academics	Links to academic records for the student	These links take you to Oracle Student System enrollment and records self service.	N/A
My Fees	Summary of outstanding charges on student account	The information for this display is based on information in the Oracle Student System Student Finance module.	N/A

Table 3–5 Student My Information Tab Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Books I have checked out	Listing of books checked out from library	N/A	Site specific implementation. This information needs to be interfaced with the library system.

3.10.2.7 University Administrator Home Page Portlets

The following table describes the portlets available on the University Administrator Home Page template.

Table 3–6 University Administrator Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Budget vs. Actuals Table	Comparison of budgets vs. actuals for current year and previous year.	N/A	Site specific implementation. Contents for this portlet could be from Oracle's Budgeting application together with supporting Financials modules.
Campus Indicators Table	Key performance indicators important to the institution. Current Year and Last Year are displayed along with the % change between years.	Most of this information is drawn from OSS.	Annual campaign and research grants would be drawn from alumni and grants modules.
Faculty/Staff Discoverer Analysis	Links to Discoverer reports that analyze Faculty and Staff trends.	N/A	Site specific implementation. Faculty and Staff information is maintained in HR applications and institutions could write Discoverer reports for analysis. These links would then run these reports as needed.

Table 3–6 University Administrator Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Endowments Chart	Chart showing endowments received over multiple years	N/A	Site specific implementation.
Historical Indicators Table	This table tracks the appropriation per FTE trends over the last 4 years. It also shows the average athletic gift over the past 4 years.	N/A	Site specific implementation.

3.10.2.8 University Administrator Admissions Tab Portlets

The following table describes the portlets available on the University Administrator Admissions Tab template.

Table 3–7 University Administrator Admissions Tab Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
New Freshmen Recruitment Status Table	Shows the number of new freshmen that progress through the admissions process.	This information comes from Oracle Student System	N/A
Application Status Table	Displays the number of applications in various decision stages such as Completed, Incomplete, Withdrawn, etc. and compares them with the previous year.	This information is derived from Oracle Student System	N/A

3.10.2.9 University Administrator Enrollment Tab Portlets

The following table describes the portlets available on the University Administrator Enrollment Tab template.

Table 3–8 University Administrator Enrollment Tab Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Enrollment Details Table	Displays enrollment numbers by department over multiple years.	This information comes from Oracle Student System enrollment.	N/A
Enrollment Discoverer Analysis	Links to Discoverer reports that analyze enrollment trends.	N/A	Site specific implementation. Enrollment data would be maintained in Oracle Student System and institutions could write discoverer reports for analysis. These links would then run these reports as needed.
Total Enrollment Chart	Graphical display of total enrollment over multiple years.	This information comes from Oracle Student System enrollment.	N/A
Undergraduate Degrees Awarded Chart	Graphical representation of the number of degrees awarded compared over time.	This information comes from Oracle Student System enrollment.	N/A

3.10.2.10 Faculty Home Page Portlets

The following table describes the portlets available on the Faculty Home Page template.

Table 3–9 Faculty Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Faculty Notifications	Notifications possibly through workflow for the faculty member	N/A	Site specific implementation. Notifications from any Oracle Applications product is displayed here.
Faculty Calendar	Calendar would show appointments, classes, University wide events/holidays	N/A	Site specific implementation.
Instructor Information	Links to instructor related applications such as Grading, Attendance and Class Lists	These links would navigate to appropriate Oracle Student System screens to which instructors have access.	N/A
To Do List	List of personal to do items	N/A	This information must be interfaced from a 3 rd party calendar management program such as the PalmOS, Outlook or Oracle's web calendar.
Discussion Groups	Links to discussion groups pertaining to the faculty members courses	N/A	Site specific implementation
Faculty Advising	Links to retrieve advisee list, advisee grades and advisee schedules	N/A	This information is retrieved from an Advising module.
Grade Distribution	Shows grade distribution for selected classes	This information would be generated based on OSS grading data	

Table 3–9 Faculty Home Page Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Campus Services	Links to campus services	N/A	Site specific implementation
Local Resources	Links to Institution-specific resources	N/A	Site specific implementation

3.10.2.11 Faculty My Class Lists Tab Portlets

The following table describes the portlets available on the Faculty My Class Lists tab template.

Table 3–10 Faculty My Class Lists Tab Portlets

Portlet Name / Location	Description	Contents from Oracle Student System	Comments
Class Lists	Shows list of students enrolled in a specific class with options to view enrolled, waitlisted, discontinued or dropped students.	The information retrieved for this portlet comes from Oracle Student System enrollment module.	Faculty is able to select the classes for which to view the class list.

3.11 Oracle Student Recruiting

Oracle Student Recruiting is composed of Oracle Marketing Online and Oracle TeleSales with setups that make these products effective for recruiting students.

Oracle Student System recruiting functionality consists of the ability to collect detailed information from prospects who submitted admission inquiries. These prospect records can be exported to Oracle Student Recruiting, where they become leads. This information can still be viewed from Oracle Student System, but active recruiting processes (campaigns, changing leads to opportunities, tracking, etc.) can be done only in Oracle Student Recruiting.

The following sections describe setup information for Oracle Student System relating to its use with Oracle Marketing Online and Oracle TeleSales components of Oracle Student Recruiting.

3.11.1 Oracle Marketing Online

Oracle Marketing Online provides features for the entire recruiting process from campaign planning, budget management, and list creation to execution, reporting, and analysis.

See Also

Refer to the *Oracle Marketing Online Implementation Guide* for detailed setup information.

3.11.1.1 Oracle Marketing Online Prerequisites

The following setups must be complete:

- Oracle Marketing Online Advanced Option
- Oracle General Ledger
- Oracle HRMS
- Oracle Inventory, to create items
- Oracle CRM Application Foundation
- Responsibilities: OSS Recruiter Self Service, OSS Recruiter Administrator

To set up Oracle General Ledger and Oracle HRMS for Student Recruiting, see Oracle CRM Application Foundation, Oracle Trading Community Architecture, and Oracle Human Resource Management Systems (HRMS) in this chapter.

3.11.1.2 Enabling Inquiry Statuses

You must enable the following inquiry statuses codes in CRM because these statuses are necessary for inquiry information processing.

- OSS Acknowledge
- OSS Complete
- OSS Registered

For information about inquiry information processing, see *Oracle Student System Open Interfaces Guide*.

Prerequisites

CRM setup must be completed.

Responsibility

Oracle Marketing Super User

Navigation

Navigate to the CRM Login page

Steps

1. Click the Profile button at the top of the page.
2. Switch responsibility to Oracle Marketing Super User.
3. Click **Update**.
4. Select the Administration tab.
5. Select the Sales subtab.
6. On the left navigation bar, click Status Code in the Opportunity menu.
7. Enter OSS% in the Status Code field.
8. Click **Search**.

You will see the following results:

- OSS_ACKNOWLEDGE
 - OSS_COMPLETE
 - OSS_REGISTERED
9. Repeat steps 10 through 12 for each status code.
 10. Click the link for the result.
 11. Select the Enabled check box.
 12. Click **Update**.

3.11.1.3 Setting Up Oracle Marketing Online

To set up Student Recruiting, users must complete all required setup steps for Oracle Marketing Online. The following key items should be configured in Oracle Marketing Online to use Student Recruiting:

- budgets
- lists
- list import

- deliverables
- metrics
- messages

3.11.1.3.1 Budgets Create budgets for targeted recruitment campaigns such as a campaign dedicated to increasing graduate enrollment or increasing diversity.

Higher education institutions can measure campaign effectiveness across a variety of communication channels and audiences. The budgeting feature enables recruiters to create, associate, and manage budgets and checkbooks. Oracle Marketing Online offers necessary controls and procedures to ensure complete and accurate return on investment analysis and to manage costs.

3.11.1.3.2 Lists Implement the list feature to generate campaign specific target lists and suppression lists.

Higher education institutions can use sophisticated list management to import, generate, compile, and profile prospect data.

3.11.1.3.3 List Import Implement List Import to capture additional attributes regarding the target audience.

Higher education institutions can import information such as test scores or high school lists into Oracle Marketing Online and leverage this information for their recruiting campaigns. Institutions can capture many additional attributes regarding the target audience and can select field information that is pertinent to their institution.

3.11.1.3.4 Deliverables Create deliverables for collateral items such as cover letters, housing brochures, or financial aid information.

Oracle Marketing Online allows higher education institutions to create and maintain any marketing-related deliverables or collateral. Institutions can attach any number of multimedia collateral to a campaign. Collateral and kits can include actual inventory items that can be fulfilled by the recruiting agent using Oracle TeleSales.

Users can bundle multiple collateral kits and personalize promotional pieces by customer segments or channels. For example, higher education institutions might bundle a cover letter with a viewbook, or bundle a cover letter with a housing brochure or financial aid and scholarship information.

3.11.1.3.5 Metrics Create additional metrics to track key performance measurements such as event confirmations, media effectiveness, venue effectiveness, and set up triggers for a call to action when events fail to reach or exceed goals.

Oracle Marketing Online provides predefined calculations for performance measurements such as leads and opportunities generated, event registrations and attendance, and budget utilization. These enable recruiters to evaluate critical performance indicators without customized setup. Oracle Marketing Online uses data mining technology to learn prospect propensities based on their characteristics and past actions. This information can be used to create lists for future higher education initiatives. Oracle Marketing Online also provides more than two hundred predefined reports covering campaigns, events, segments, channels, leads, and products.

3.11.1.3.6 Messages Create messages to associate the vision for an institution to a campaign. Institutions can leverage these messages to attract prospects to their campus.

3.11.2 Oracle TeleSales

Oracle TeleSales is part of Student Recruiting. Oracle TeleSales allows recruiting representatives to review or enter prospect data and provides a set of tools to manage the recruiting process from lead management through event registration and collateral fulfillment.

The following key components should be configured in Oracle TeleSales:

- relationship management
- lead status
- lead rank values
- lead source
- lead administration or lead scorecard
- lead rank mapping
- sales channels
- timeframe
- opportunity management
- sales stages and sales methodology

- win probabilities
- interest types
- notes and note types
- interaction tracking and outcomes
- task types
- territory management
- custom tabs

See Also

Refer to the *Oracle TeleSales Implementation Guide* for detailed information.

3.11.2.1 Oracle TeleSales Prerequisites

For Oracle TeleSales, responsibilities, lookups, and profile options need to be set up.

3.11.2.1.1 Responsibilities Create the following responsibilities to map to Oracle TeleSales responsibilities to Student Recruiting.

Table 3–11 Oracle Student Recruiting Responsibilities

Student Recruiting Responsibility	TeleSales Responsibility
Recruiting Agent or Recruiting Representative	TeleSales Agent
Recruiting Manager	TeleSales Manager
Recruiting Administrator	TeleSales Administrator
Recruiting Administration	TeleSales Administration

The JTF_DEFAULT_PROFILE_RESPONSIBILITY profile is not required for Oracle TeleSales.

3.11.2.1.2 Lookups Key lookup codes for TeleSales are close reason, competitor, event facility, and issue.

Sample **close reasons** might include the following:

- institution not interested

- prospect not interested
- enrolled elsewhere
- financial
- deceased
- applied
- enrolled

The **competitor** lookup is used to identify competing institutions.

Configure the type of event facilities used by the institution. These might include:

- community centers
- college ballrooms
- auditoriums
- high schools
- hotels

The **issue** lookup allows you to record problems related to a prospect opportunity. Sample issue values might include the following:

- application information
- application documentation
- deposit
- financial aid
- institution costs

3.11.2.1.3 Oracle TeleSale Profile Values

Table 3–12 *TeleSales Profile Values*

Profile Option Name	Value	Description
OTS: Default Party Type	Organization or Person	Default value is Organization; typically higher education institutions should set this to Person

Table 3–12 TeleSales Profile Values

Profile Option Name	Value	Description
OTS: Default Relationship	Default relationship	Set to Contact Of Note: Higher education institutions may want to create their own relationships and select a user-defined relationship as the default relationship.
OTS: Enable Address Validation	Yes or no	Set to Yes to enforce address validation
OTS: Interaction Default Outcome	Default outcome	Enables institutions to set a default common desired outcome such as Prospect Contacted
OTS: Sales Online Interaction Enabled	Yes or no	Set to Yes to record interactions Note: The profile option cannot be set to Yes until a campaign is activated.
OTS: Max Interactions Displayed	Number	Sets number of interactions that can be displayed on a record; default value is set to 10. Institutions may want to have more or less interaction records displayed.
MO: Operating Unit	Operating unit	If multiple organization support is enabled, profile option must be set for any responsibilities that are used or created for recruiting. Sales Online transfers information to Receivables and the organization must be set to accurately transfer accounting information.
OS: Opportunity Sales Team Default Role Type	Default role type	Institutions may want to set the default role type to Recruiter at the Site level. However, this depends on the implementation.
OS: Sales Lead Access Privilege	Full, Prospecting, or Sales Team	Controls the level of access to lead information
OS: Sales Opportunity Access Privilege	Org Full, Global Full, Prospecting, or Sales Team	Controls the level of access to opportunity information

3.11.2.2 Setting Up Oracle TeleSales

The following items need to be setup in Oracle TeleSales for use with Oracle Student System.

3.11.2.2.1 Relationships Set up relationships to capture business, personal, individual to organization, and organization to organization relationships. This provides educational institutions with a 360-degree view of an individual prospect.

In addition to relationships between the institution and prospects, institutions can also create and track other relationships that a prospect may have within the community, alumni, schools, and other learning institutions. For example, when a prospect inquires about the institution, users can determine that his or her great-grandfather attended the institution, that the prospect has a sibling at the institution, or that a parent of the prospect works for the institution. Recruiters can use this information to target the individual.

3.11.2.2.2 Lead Status Set up lead statuses to describe the inquiry status of a prospect. Oracle Sales Online provides a set of predefined lead statuses. For recruiting purposes, institutions can configure the following alternate statuses:

- new
- inactive
- prospect
- active inquirer

3.11.2.2.3 Lead Rank Values Set up lead rank values. Define values for the RANK_ID lookup. An institution might set up values for the following:

- not interested
- somewhat interested
- interested
- extremely interested

3.11.2.2.4 Lead Source Values Set up lead source values. Define values for the LEAD_SOURCE lookup. Lead sources might include the following:

- PSAT list
- purchased list
- counselor

- teacher
- alumni
- event
- Web
- email

3.11.2.2.5 Lead Scorecard Lead administration allows institutions to rank leads using a scorecard approach. The scorecard assigns points for information that is entered about a lead and uses the sum to assign that lead a ranking. Rules may be applied to leverage things such as the source of the lead (sales channel configuration), campaign, or timeframe.

3.11.2.2.6 Lead Rank Mapping Set up lead rank mapping to enter possible scores that the lead score card can assign to leads. This mapping may look like the following table.

Table 3–13 Lead Rank Mapping Values

Minimum Lead Score	Maximum Lead Score	Rank
1	25	Not interested
26	50	Somewhat interested
51	75	Interested
76	100	Extremely interested

3.11.2.2.7 Sales Channels Set up sales channels to identify how information about a prospect was obtained. Some examples of sales or lead channel configurations are:

- high school visit
- college fair
- Web site
- email
- campus visit
- alumni representative

- purchased list
- PSAT list
- sent scores

3.11.2.2.8 Timeframe The timeframe represents the decision timeframe for a prospect. This could be one week to several years. The timeframe can be used to identify the amount of time before a prospect will be eligible to attend the institution. For example, a prospect might be a junior in high school and have a two year timeframe. Correspondence and communications can leverage the timeframe for a prospect and help institutions to determine the collateral that should be sent to a prospect or list of prospects.

3.11.2.2.9 Opportunity Management Set up opportunity management to assist recruiting representatives to more effectively recruit prospects by providing all of the information they need to know about an opportunity including:

- details
- events
- lead information concerning the prospect
- values
- probability of closure
- recruiting team members involved with the opportunity
- information on competitors
- major obstacles
- products or services that may be of interest

Opportunity management ensures that recruiting representatives have all of the information that they need to enhance prospect relationships and probability of enrollments.

3.11.2.2.10 Win Probabilities Win probabilities represent the current state of an opportunity. Institutions can link win probabilities to an opportunity to assist with forecasting applications and probable enrollment. A table of sample probabilities is included below.

Table 3–14 Lead Rank Mapping Values

Win Probability	Meaning
0	Lost to Competitor
1	No Opportunity
5	Prospect
7	Applicant/Withdrawn
10	Denied Applicant
20	Admitted/Offer Declined
25	Committed/Withdrawn
29	Registered/Withdrawn
30	Active Inquirer
40	Applicant
50	Admitted Applicant
80	Committed
90	Registered
100	Matriculated

3.11.2.2.11 Sales Stages and Sales Methodology Set up sales stages and a sales methodology. The sales stages represent a methodology that corresponds to the probability range that a prospect will apply or enroll in the higher education institution. The stages could represent a prospect's inquiry status or the probability of enrollment.

Table 3–15 Sales Stages

Name	Description	Minimum Win Probability	Maximum Win Probability
Prospect	Prospect	0	5
Applicant/Withdrawn	Applicant/Withdrawn	0	7
Denied Applicant	Denied Applicant	0	10
Admit/Declines Offer	Admit/Declined Offer	0	10

Table 3–15 Sales Stages

Name	Description	Minimum Win Probability	Maximum Win Probability
Committed/Withdrawn	Committed/Withdrawn	0	29
Inquirer	Active Inquirer	30	39
Applicant	Applicant	40	49
Admitted/Applicant	Admitted Applicant	50	59
Committed	Committed	80	89
Registered	Registered	90	99
Matriculated	Matriculated	100	100

3.11.2.2.12 Interest Types Interest types can represent the areas of study that the institution provides for all learners. An interest type can represent any classification of an area of interest. Interest type classifications consist of three layers: interest type, primary interest code, and secondary interest code.

Table 3–16 Sales Stages

Interest Type	Primary Code	Secondary Code
B.S.	Biology	Chemistry
B.A.	English	Undecided
Continuing Education	Art	None

3.11.2.2.13 Notes and Note Types Student Recruiting representatives can query notes to obtain additional information about prospects. Notes provide a comprehensive view of prospect interactions and help representatives to increase their understanding of the prospect and build stronger one-on-one relationships.

Note types are used to further classify notes. Examples of note types are Academic note or Athletic Department note. Note types clarify the point and purpose of a note.

3.11.2.2.14 Interaction Tracking Interaction Tracking records events for a recruiting prospect including correspondence received and subsequently sent to the prospect including the correspondence media, date, and time.

3.11.2.2.15 Task Types Task types can be as specific as required. Sample task types might include the following:

- update open house collateral
- prep for high school visit
- send housing information

3.11.2.2.16 Territories Sample territories are defined specific to the recruitment geography for the higher education institution.

3.11.2.2.17 Custom Tabs Institutions can create two custom tabs within the eBusiness Center framework specification. These tabs are used to capture information from a variety of sources such as a student search or purchased list, additional biodemographical data, or additional test score information.

3.12 Oracle Trading Community Architecture

The Oracle 11i TCA model is a highly flexible architecture that allows you to fully model real world entities in your trading community and accurately represent the complex relationships among those entities. TCA includes a database schema, APIs, and data quality management utilities that allow you to capture and exploit valuable information about your community, its organizations, people, and places.

TCA is used by the Oracle E-Business Suite. Each organization or person is stored as a party in the TCA model.

See Also

For more information on TCA, see the following:

- *Oracle Trading Community Architecture API User Notes*
- *Oracle Trading Community Architecture Data Quality Management User Guide*
- *Oracle Trading Community Architecture Third Party Data Integration User Guide*

3.12.1 Defining Oracle Student System and TCA

When person or organization data is entered or imported into OSS, it is inserted into HZ_PARTIES and related tables that are used by OSS. The table below shows some of the TCA tables that are currently used by the main OSS entities.

Additional information about a person or organization is retained in OSS tables not included in TCA.

No setup is required to enable TCA in Oracle Student System.

Table 3–17 TCA and Oracle Student System Relationships

Oracle Student System Table / View	TCA Table
Person Details This is general information about a person.	HZ_PARTIES HZ_PERSON_PROFILES
Person Statistics This is statistical details about a person, such as biographical and demographic data.	HZ_PERSON_PROFILES HZ_LANGUAGE HZ_CITIZENSHIP
Person Relationships This is relationships of a person, institution, or organization unit.	HZ_PARTIES HZ_RELATIONSHIPS
Person Employment This is employment details of a person.	HZ_EMPLOYMENT_HISTORY
Person Academic History This is academic history details of a person.	HZ_EDUCATION
Person Extracurricular Activities This is extracurricular activities of an applicant.	HZ_PERSON_INTEREST
Person Addresses This is address details of a person.	HZ_PARTIES HZ_PARTY_SITES HZ_LOCATIONS HZ_PARTY_SITE_USES
Institutions This is general details of an institution.	HZ_PARTIES
Institution Addresses This is address details of an institution.	HZ_PARTIES HZ_PARTY_SITES HZ_LOCATIONS HZ_PARTY_SITE_USES

Table 3–17 TCA and Oracle Student System Relationships

Oracle Student System Table / View	TCA Table
Organization Units This is details of an organization unit.	HZ_PARTIES
Organization Units Addresses This is address details of an organization unit.	HZ_PARTIES HZ_PARTY_SITES HZ_LOCATIONS HZ_PARTY_SITE_USES

3.13 Oracle Web ADI

Oracle Web Applications Desktop Integrator (ADI) is a self-service, spreadsheet-based extension to Oracle Student System that enables student grades to be managed with a spreadsheet. ADI combines a spreadsheet's ease of use with the power of Oracle Applications.

Oracle Web ADI allows faculty members and system administrators to:

- download student lists to spreadsheets
- download and upload unit grades and assessment item outcomes
- download and upload progression outcomes

Oracle Web ADI integrates with Oracle Student System self service pages seamlessly. There is no setup.

3.14 Oracle Workflow

Oracle Workflow consists of workflows and business events.

3.14.1 Workflows

Oracle Student System uses Oracle Workflow to define and implement processes for an institution.

Workflow features include the following:

- Oracle Workflow Builder, a graphical tool that lets users create business process definitions
- Workflow Engine, which implements process definitions at runtime

- Notification System, which sends notifications and processes responses in a workflow

Workflow functionality in Student System allows users to automatically route information to users and to deliver notifications regarding issues needing attention or processes that have been completed. Workflow features are available in Person, Financial Aid and Academic Records.

To enable Workflow functionality, you must install and run Oracle Workflow.

3.14.2 Business Events

A business event is an occurrence in an Internet or intranet application or program that might be significant to other objects in a system or to external agents. For instance, the creation of a purchase order is an example of a business event in a purchasing application.

Business events can be managed using the Oracle Workflow Event Manager Web pages, and significant events can be defined in Event Manager.

Most Student System business events are enabled by default. Business events have been defined for Program Structure and Planning, Person, Enrollment, and Academic Records.

There is no Generate Function Name for any Oracle Student System business event.

See Also

For more information about business events, see the *Oracle Workflow Guide*.

3.14.3 Oracle Student System Workflows and Business Events

Appendix C describes the seeded business events and workflows that are available in Oracle Student System.

3.15 Profile Options

Profile options must be specified as part of implementing Oracle Student System. A profile option can be queried individually by its profile option name or by the application code IGS. The application code for the Financial Aid subsystem is IGF.

A profile can be set at the following levels:

- **Site.** Use if the profile option applies to all users at your site.
- **Application.** Oracle Student System or Oracle Financial Aid.

- **Responsibility.** Use only if the profile option you are defining is specific to a responsibility.
- **User.** Use only if the profile option you are defining is specific to a user.

Oracle Student System profile options enable functionality specific to a subsystem or group of subsystems. As a result, setting profile options is part of the setup for most subsystems.

See Also

Refer to Appendix A for detailed information about Oracle Student System profile options.

For additional information on setting profile options, see the *Oracle Applications User's Guide*.

3.16 Self Service

3.16.1 Personalizing Self Service Pages

Self service pages can be customized at the client site using the personalization features provided by Oracle Applications Framework.

See Also

The documentation for personalization is available on Metalink. Refer to the following:

OA Personalization Framework and OA Extensibility Framework

Oracle Self Service Web Applications Implementation Manual

Configuring and Troubleshooting the Self Service Framework 5.5.2 with 11

Instructions for Setting up Self Service Framework Technology Stack

3.16.2 New User and Forgotten Password Functionality

Self-service users can create new user IDs and new passwords. These features are enabled by creating links on the login page.

3.16.2.1 New User/Forgotten Password Profile Options

The following profile options must be set up to support new user and forgotten word functionality:

- IGS: Self Service Administrator: Set the profile option at the site level. The value entered must be a self service administrator's user name.
- IGS: Approval Required for Person Creation: Set the profile option at the site level. Available values are Yes and No. The default value is Yes.
- IGS: Approver of Person Creation: Set the profile option at the site level. The approver may be different than the Self Service administrator. A value is required if IGS: Approval for Person Creation is set to Yes.
- HZ: Generate Party Number: Set the profile option at the site level for New User Registration functionality to Yes.
- IGS: Generate User Name Automatically: Set the profile option at the site level. If the value is set to No, a user name can be entered in the Self Service Creation page. If the value is set to Yes, a business event is raised and the institution will have to subscribe to a function that creates the user name. The default value is No.
- Self Service Person Responsibility. The Self Service Responsibility tab in the Person Data Setup window in Oracle Student System must be configured with all system person types mapped to a responsibility

3.16.2.2 Required Hyperlinks and User Definitions

Two links need to be added to the login page:

- New Users Register Here
- Forgot Password

To enable the above functionality, customers must create the user named **igsguest** with the same password. User **igsguest** must be assigned the **OSS Guest Self Service** responsibility.

3.16.2.3 Javascript Modifications

Modify the login page located in \$OA_HTML/US with the file named ICXINDEX.htm. Ensure that the original file is saved as ICXINDEX.htm.backup and add the following javascript functions below the existing javascript function logon-submit().

```
function newuserLogin()
{
    document.Logon12.i_1.value = "igsguest";
    document.Logon12.i_2.value = "igsguest";
    document.Logon12.URL.value =
```

```

"/OA_HTML/OA.jsp?akRegionCode=IGS_PE_PERSON_REQUEST_
PAGE&akRegionApplicationId=8405"
document.Logon12.submit();
};

function forgotLogin()
{
    document.Logon12.i_1.value = "igsguest";
    document.Logon12.i_2.value = "igsguest";
    document.Logon12.URL.value =
"/OA_HTML/OA.jsp?akRegionCode=IGS_PE_PERSON_PSWD_
PAGE&akRegionApplicationId=8405"
document.Logon12.submit();
};

```

Add the following code above the existing <FORM NAME="Logon0" tag in ICXINDEX.htm.

Change **[INSTANCE NAME]** to be the actual Database Instance name which is being used by the customer.

```

<FORM NAME="Logon12" ACTION="/pls/[INSTANCE NAME]/OracleApps.redirectURL"
METHOD="POST" TARGET="_top">
<INPUT TYPE="hidden" NAME="i_1" VALUE="">
<INPUT TYPE="hidden" NAME="i_2" VALUE="">
<INPUT TYPE="hidden" NAME="URL" VALUE="">
</FORM>

```

Add the following code to the login page to place the links on the page:

```

<A HREF="javascript:newuserLogin()"> New Users Register Here</A>
<A HREF="javascript:forgotLogin()"> Forgot password?</A>

```

After the changes have been made, verify the save file as ICXINDEX.htm.links. This setup will not be deleted during a reinstall.

3.16.2.4 Batch Creation of Person User Names

Institutions can import thousand of applications, and each of these applicants may need to have a user account to view their application from the institution's Web site.

A Person ID Group needs to be created for each group of new users.

The Person User Name Batch Creation concurrent process creates user accounts in bulk for the Person ID Group.

If the user does not have an account already, the concurrent process creates a user account in FND_USER with generated user name, password, and person attributes in the customer field and send an email to the user about the newly created account.

Note: The IGS: Generate User Name Automatically profile option must be set to Yes. Otherwise, this concurrent process is not available. In addition, each person record must have a primary email address, first name, last name, date of birth, and gender.

3.16.3 Self-Service Inquiries

A link can be created to enable self service inquiries from a customer's Web site.

Note: Users must be assigned OSS Guest Responsibility

If customers want to put a link for self service inquiries on their school Web site, they should follow the same procedure as above. The only difference is that the URL.value in the function should be:

```
/OA_HTML/OA.jsp?akRegionCode=IGS_AD_INQ_ENTRY_STATUS_  
PAGE&akRegionApplicationId=8405
```

Users should pass the user ID and password as the guest user (igsguest) that they created. This procedure to pass the guest user ID and password can be the same as the login page.

Systemwide Services: Person

4.1 Person Overview

The Person subsystem records and maintains all details related to persons entered in Oracle Student System.

Person and organization entities within Oracle Student System use the Trading Community Architecture to enhance the interaction between Oracle Student System and the other e-business suite modules.

The Person subsystem allows you to perform the following tasks:

- set up person types indicating the types of persons entered in Oracle Student System and the data required for each type
- set up codes and types used as attribute values for various person related entities in Student System
- define holds that exist in system and how they are applied
- create and maintains records for person related entities
- enter inquiries to retrieve and research data stored in Student System
- declare comparative profiles, finds duplicates, and enables records to be reviewed
- group data to warn users not to divulge information and for any institution-defined means

Under certain circumstances, dynamic prompts appear in several Person subsystem windows. Table 4–1 describes the dynamic prompts.

Table 4–1 Dynamic Prompts

Dynamic Prompt	Description
Deceased	person is deceased; conditional field appears to allow user to enter deceased date
Holds Exist	indicates student has academic hold restricting enrollment in context program; hold details are maintained in Person Hold Details window
Administrative Hold	indicates applicant has administrative hold restricting access to services provided by institution; hold details are maintained in Person Hold Details window
[Privacy Level]	indicates level of privacy indicated for this level of data, for example, Level 5 - High; privacy level entered for data group, then data group is assigned to person
[Admission Process Category]	admission process category of current session details if they differ from admission process category associated with displayed program; program admission process category is used rather than session admission process category
[Override Commencement Period]	override commencement period of existing application instance that is deferred or requested for reconsideration; asterisk (*) appears next to each overridden application instance; new commencement period appears
[Recorded Preferences]	list of program preferences showing where program application appears in list of applicants expressing preference for same programs, and maximum number of programs they can apply for
Reconsideration	indicates program application has Request For Reconsideration check box selected, and it must be included in new admission period
[New Admission Period]	date when application flagged for reconsideration is included in admission period, for example, 1999/2
Student Program Attempt	after preenrollment for a program application, indicates unconfirmed or inactive student program attempt exists
[Person ID Type]	if person type is assigned in which Preferred check box is selected, person ID type appears in each window in which person number appears; can be used as alternative way of identifying person

Table 4–1 Dynamic Prompts

Dynamic Prompt	Description
[Active or Inactive Oracle User name]	appears in Person Query window to indicate whether person is active or inactive user
[Load Calendar Name and Dates]	appears in Student Program Attempt window if student is enrolled in program; load calendar used to derive current attendance mode and type; for example, Load-Cal-1 01-JAN-1999 30-JUN-1999 Note: A student's derived attendance mode and type can differ from the attendance mode and type of the program offered to the student which appears in the Person Query window.
[Lamp]	appears when a merged or obsoleted person record is retrieved

4.2 Person Lookups

Person lookup codes must be defined.

The following table shows FND lookups for code classes.

Table 4–2 FND Lookups for Code Classes

Code Name	Code Class	FND Lookup
Province Codes	IGS_PE_PROVINCE_CD Table	N/A
State Codes	IGS_PE_STATE_CD Table	N/A
Person Alias Types	IGS_PE_ALIAS_TYPES_ALL Table	PE_ALIAS_TYPE
Insurance Detail	INSURANCE_TYPE	PE_INS_TYPE
Residency Class	RESIDENCY_CLASS	PE_RES_CLASS
Residency Status	RESIDENCY_STATUS	PE_RES_STATUS
Military Assistance Status	ASSISTANCE_STATUS	PE_MIL_ASS_STATUS
Military Assistance Type	ASSISTANCE_TYPE	PE_MIL_ASS_TYPE
Military Separation Type	SEPARATION_TYPE	PE_MIL_SEP_TYPE

Table 4–2 FND Lookups for Code Classes

Code Name	Code Class	FND Lookup
Military Service Type	SERVICE_TYPE	PE_MIL_SEV_TYPE
Special Need Additional Support Level	ADD_SUPPORT_LEVEL	PE_SN_ADD_SUP_LVL
Special Need Allowance	SPECIAL_NEED_ ALLOW	PE_SN_ALLOW
Special Need Service	SPECIAL_SERVICE	PE_SN_SERVICE
Citizenship Status	CITIZENSHIP_STATUS	PE_CITI_STATUS
Visa Type	IGS_AD_VISA_TYPE Table	PER_US_VISA_TYPE Note: This lookup is in Oracle Human Resource Management Systems.
Further Education	FURTHER_EDUCATION	PE_FUR_EDU
Religion	RELIGION	PE_RELIGION
Socioeconomic Status	SOCIO_ECONOMIC	PE_SOCECO_STATUS
Teaching Period Residence Status	TEACH_PERIOD_ RESIDENCE	PE_TEA_PER_RES
Immunization Status	PE_IMMU_STATUS	PE_IMM_STATUS
Immunization Type	PE_IMMU_TYPE	PE_IMM_TYPE
Athletics Eligibility Status	ELIGIBILITY_STATUS	PE_ATH_ELG_STATUS
Athletics Sports Type	SPORTS_TYPES	PE_ATH_SPT_TYPE
College Activities and Extracurricular Activities	INTENT_COLLEGE_ACT and EXTRA_CURR_ACT	INTEREST_TYPE and ENTERTAINMENT Note: These lookups are in Oracle Receivables.
Credentials Rating	CREDENTIAL_RATING	PE_CRE_RATING

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Lookups

Steps

In the Type field, enter a lookup from the following list and enter user-defined codes for each lookup:

- PE_NOTE_TYPE
- PE_ALIAS_TYPE
- PE_INS_TYPE
- PE_IMM_STATUS
- PE_RES_CLASS
- PE_RES_STATUS
- PE_MIL_ASS_STATUS
- PE_MIL_ASS_TYPE
- PE_MIL_SEP_TYPE
- PE_MIL_SEV_TYPE
- PE_SN_ADD_SUP_LVL
- PE_SN_ALLOW
- PE_SN_SERVICE
- PE_CITI_STATUS
- PE_FUND_TYPE
- PE_FUR_EDU
- PE_SOCECO_STATUS
- PE_RELIGION
- PE_TEA_PER_RES
- PE_ATH_ELG_STATUS
- PE_ATH_PRG_TYPE

- PE_CRE_RATING
- PE_ACAD_HONORS
- INTEREST_TYPES
- PE_RACE

4.3 Person Data

Person functionality enables users to assign person types to individuals with Student System, enter relationship data for people in Student System, and enter contact information for people in Student System.

4.3.1 Setting Up Person Data IGSPE052

Use the Person Data Setup window to set up all Person data information.

4.3.1.1 Setting Up Person Types

A person type is an institution-defined classification of persons. You must map institution-defined person types to system-defined person types.

You create institutional person types for existing system-defined person types. Each institution-defined person type must have a system-defined person type associated with it. Each system-defined person type can have at most one person type associated with it, except for user-defined types which may have multiple person types associated with it.

The person type Other must be defined to enter other person records into the system using the Person Details window. When a person detail record is created and saved, Student System generates a default person type record under the Other person type category.

Prerequisites

FND Responsibilities

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window > Person Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–3 Person Type Tab

Person Type Tab

Person Type	required		institution-defined person type Note: A system-defined person type must correspond to an institution-defined person type. A user-defined person type can correspond to more than one institution-defined person type. Note: A person type cannot be deleted.
Description	required		person type description
System Type	required	list of values	system-defined person type
Closed	optional	check box	if selected, prevents further use of a person type

Guidelines

Note: A system-defined person type must correspond to an institution-defined person type. A user-defined person type can correspond to more than one institution-defined person type.

4.3.1.2 Setting Up Person ID Types

The person ID types procedure enables users to create the required personal identification types for students.

In Student System, a person with an assigned identification number can also have other identification codes. A person identification type identifies the purpose of an identification code. It can be mapped to a system-defined person identification type. If an identification code is from another system or organization, it is assigned a system-defined institution code.

For example, a person who is both a student and a staff member has a student identification number and a staff number. The staff number is entered as an alternative person identification. Staff is a person identification type assigned to staff members with alternative person identifications to distinguish them from alternative person identifications of other types.

Each person ID type permits an additional code to be entered against a person record to enable another way of uniquely identifying such data. The alternative

identifier is an instance of a person ID type and value, when associated with a record. If a person identification type defines an existing alternative person ID for a person, it cannot be deleted.

Note: UK users go to Defining Alternate Person ID Types for UK Functionality.

Prerequisites

FND Responsibilities

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window > Person ID Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–4 Person Type ID Tab

Person Type ID Tab			
Person ID Type	Required		User-defined person identifier type
Description	Required		Person ID type description
System Person ID Type	Required	List of values	System-defined person ID type assigned to user-defined person ID type
Institution Code	Optional	List of values	System-defined institution codes assigned to students with identification codes from another system or organization

Table 4–4 Person Type ID Tab

Person Type ID Tab			
Preferred	Optional	Check box	<p>If selected, indicates that the person identification type is the preferred person identification type for the institution</p> <p>Note: Select the Preferred check box for one person identification type only.</p> <p>Note: When users select the Preferred check box, Student System searches for duplication in other records. If selected in another record, users cannot select the Preferred check box.</p>
Unique	Optional	Check box	<p>If selected, prevents two persons from having the same alternate person identification for the specified identification type</p> <p>Note: Student system checks existing duplicate records. If duplicate records exist, the system issues a warning message.</p>
Format Mask	Optional		Person ID type format; hyphenated numeric or alphanumeric characters

4.3.1.3 Defining Alternate Person ID Types for UK Functionality

Use this procedure to define the required alternate person ID types that apply to the HESA and UCAS identifies and the student loans company student identifier.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window > Person ID Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–5 Alternate Person ID Types

Type	Description	System Person ID Type
DH REG REF	Regulatory body registration number	Other
UCASREGNO	SCOTVGO number	Other
HUSID	HESA ID number	Other
TEACH REF	Teacher reference number	Other
UCASID	UCAS number	Other

Note: If you plan to process NMAS applications, you should set up the following alternate person ID type.

Table 4–6 Alternate Person ID Type, NMAS

Type	Description	System Person ID Type
NMASID	NMAS Application Number	Other

A person ID type with system person ID type Other should be set up for recording the UK National Insurance number.

Note: If you plan to process SWAS applications, you should set up the following alternate person ID type:

Table 4–7 Alternate Person ID Type, SWAS

Type	Description	System Person ID Type
SWASID	SWAS Application Number	Other

Note: If you plan to process GTTR applications, you should set up the following alternate person ID type:

Table 4–8 Alternate Person ID Type, GTTR

Type	Description	System Person ID Type
GTTRID	GTTR Application Number	Other

Finally, define a student loans company identity person ID type with system type Student Loan Company ID.

See Person Type ID Tab table for more information.

4.3.1.4 Setting Up Mandatory Data by Person Type

The mandatory data by person type procedure indicates which data elements are mandatory or preferred by person type.

When data in the Person Details, Record Admission Inquiries, Student Enrollments, and Direct Admission windows is created or modified, the system uses information in the Mandatory Data by Person Types window to check if a data element is mandatory, preferred, or neither mandatory nor preferred.

If a data element is mandatory and the user makes it null, an error message appears and data must be entered. If a data element is preferred and the user makes it null, a warning message appears, but it can remain null. If a data element is neither mandatory nor preferred, no message appears and it can remain null.

For a person type that is mapped to the system type Other, data elements cannot be defined.

If the user attempts to modify the person type with a concurrent process and person records are missing mandatory data for that new person type, the concurrent process skips those records and list them in the discrepancy report at the end.

Prerequisites

Person Type

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window > Mandatory Data tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–9 Mandatory Data Tab

Mandatory Data Tab			
Person Type	Display only		Person type

Table 4–9 Mandatory Data Tab

Mandatory Data Tab			
Description	Display only		Person type description
Data	Display only		Data to be determined to be mandatory, preferred, or not required
Value	Optional		Value of data
Required	Required	List of values	Valid values include mandatory, preferred, and none.

4.3.1.5 Setting Up Private Data Groups

Private data groups are defined to set up collection and maintenance of data elements within and outside the system. For example, paper copies of income tax forms. The data groups are associated in levels 1 through 5, ranging from low to high privacy levels.

The private data groups procedure enables users to define groups which require data privacy levels.

Potentially sensitive data items are displayed with a lamp lit on the upper left side when a person's record is associated with a privacy data group.

The institution takes sole responsibility of information that is released within their system.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window > Private Data Group tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–10 Private Data Groups Tab

Private Data Groups Tab			
Data Group	required		private data group name
Description	required		private data group description
Level	required		private data group level
Description	required		private data group level description
Closed	optional	check box	if selected, prevents further use of the private data group Note: A private data group can be deleted only when it has no person records associated with it.

4.3.1.6 Setting Up Self Service Person Responsibility

The Self Service Person Responsibility tab is used to set up the link between the system seeded person type and the institution's defined responsibilities.

This functionality is used for the New User Registration link. When creating a user, you must indicate what responsibilities to grant the user access in self-service.

Users can customize responsibilities and grant these responsibilities to specific system seeded person types defined in Student System.

Each system seeded person type may be linked to more than one responsibility but must be linked to at least one responsibility. This link enables users to specify responsibilities for self service users.

For example, you can create a link between the system person type of Advisor to the responsibility OSS Advisor Self Service, or you can create a user in system administrator and assign the OSS Advisor Self Service responsibility to the user.

Multiple records can be entered, deleted, or updated.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup window >Self Service Person Responsibility tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–11 Self-Service Person Responsibility Tab

Self Service Person Responsibility Tab			
System Person Type	Required	List of values	Seeded person type
Responsibility Name	Required	List of values	Name associated with responsibility Note: Only responsibilities that have been indicated as available from Oracle Self Service Web Application are displayed. These responsibilities are created in System Administration.

UK Note: Special needs codes are mapped to UCAS and HESA disability codes.

4.3.1.7 Mapping to Oracle HRMS Person Types

Oracle Applications Human Resource has a user-defined setup for person types. In Oracle Human Resource Management Systems, the application has three specific system person types defined.

The user-defined setup is mapped to one of these system person types. There may be multiple user-defined person types mapped to a system person type. For example, a user defined person type could be Staff, Administrator, and Faculty in which all three user-defined values are mapped to the system person type of Employee.

Oracle Student System has its own set of person types, which are user-defined and mapped to system person types.

The two sets of person types in Oracle Student System and Oracle Human Resource Management Systems must be mapped so that Oracle Human Resource

Management Systems changes or creation of a person type are also reflected in Oracle Student System.

Oracle Human Resource Management Systems must be an installed product on the same instance as Oracle Student System.

A mapped Oracle Human Resource Management Systems/Oracle Student System person type cannot be end dated. An end date may only be entered through Oracle Human Resource Management Systems.

After a user-defined person type in Oracle Student System has been mapped to a Oracle Human Resource Management Systems person type and a person has the Oracle Student System / Oracle Human Resource Management Systems mapped person type, the Oracle Student System person type may not be closed or inactivated.

In Oracle Student System, you cannot assign a faculty or staff person type if an Oracle Human Resource Management Systems person type exists for faculty/staff.

If a person type is closed in Oracle Human Resource Management Systems and a person has the person type assigned in Oracle Student System, then the person type will be end dated for the person in Oracle Student System.

Prerequisites

Oracle Human Resource Management Systems must be installed.

Person types in Oracle Human Resource Management Systems must be established.

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Person Data Setup > HR Person Type Mapping tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–12 HR Person Type Mapping Tab and HR Person Types Region

Field Name	Type	Features	Description
HR Person Type Mapping Tab			
Person Type	Required	List of values	Mapped to system person type of Faculty and Staff Valid values include Faculty and Staff
Description	Required		Description of person type is automatically populated when you select Person Type
HR Person Types Region			
Human Resources Person Type	Required	List of Values	Oracle Human Resource Management Systems user-defined person type Valid values are active values in the PER_PERSON_TYPES table and must be a system person type of Employee. Note: Multiple Oracle Human Resource Management Systems person types can be assigned to one Oracle Student System person type.
Human Resources System Person Type	Required		System person type is automatically populated when you select the Human Resources Person Type

Guidelines

A person type may be mapped to one or more Oracle Human Resource Management Systems person types.

Oracle Human Resource Management Systems person types can have multiple values for the system person type of Employee. For example, Staff, Faculty, and Administrator can each be mapped to the system person type of Employee.

When an Oracle Human Resource Management Systems person type has been mapped to an Oracle Student System person type, it cannot be mapped to another Oracle Student System person type.

If a person type is closed in Oracle Human Resource Management Systems after the mapping in Oracle Student System, then you must update the Person Type Mapping window.

4.4 Person Responsibility

4.4.1 Setting Up Configuration Window IGSPE050

Use this window to capture user preferences on the Person Details and subordinate windows. You can configure individual windows to be display only for some responsibilities. You can also configure individual tabs on the windows to be display only or to be hidden.

Prerequisites

FND Responsibilities

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Form Configuration

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–13 Form Configuration Window Description

Field Name	Type	Features	Description
Responsibility	Required	List of values	User defined responsibility.
Copy Button	Optional	Button	Allows copy of one responsibility's access and navigation to another responsibility.
Navigation Tab			
Form	Required	List of values	Window being configured. Note: Person Details is the only available window.
Seq	Required		Sequence of buttons, left to right on Person Details window Automatically populated by selecting a responsibility Note: Use only positive numeric text.
Sub Form	Required	List of values	Sub window to be called on the Person Details form.

Table 4–13 Form Configuration Window Description

Field Name	Type	Features	Description
Label	Required		Label for button to be used on Person Details.
Access Tab			
Form Region			
Form	Required	List of values	List of sub forms to create access rules
Query Only	Optional	Check box	Determines if sub window is query only.
Tab Page Region			
Tab Page	Required	List of values	Select from valid list of tab regions of sub window to create access rules.
Query Only	Optional	Radio button	Determines if tab region is query only Each record can be either Query Only or Hide. You select one radio Button or the other. If neither is selected, then the responsibility has full access to the tab.
Hide	Optional	Radio button	Determines if tab region hidden. Each record can be either Query Only or Hide. You select one radio Button or the other. If neither is selected, then the responsibility has full access to the tab.

4.5 Person Matching Criteria

Duplicate Person functionality determines exact, partial, or near matches for persons in Student System.

Users can enter match criteria sets to determine exact, partial, or near matches based on user-identified criteria. This criteria is set up in the Match Criteria Sets window.

If a user enters a person that matches the duplicate match criteria set, the user is automatically taken to the Duplicate Person Details window, where they must decide if the record is duplicate or new.

4.5.1 Setting Up Source Types IGSPE021

Users create match criteria sets for identifying exact, partial, or near matches. The match criteria sets can be used for imported data of any source type or for manually entered data.

The match criteria sets procedure enables users to set up match criteria sets that can be selected during the import admissions data process.

Oracle Student System contains a default set of static elements that identify exact matches, and a corresponding default set of static elements for identifying partial or near matches. Users can create new sets based on default sets to customize the match rules. There must always be a one-to-one relationship between an exact match criteria set and a partial or near match criteria set. The partial match set must be a subset of its corresponding exact match criteria set.

UK Note: The source types listed in the following table should be defined:

Table 4–14 Source Types

Source Type	System Source Type
UCAS_PER	PROSPECT_LIST
UCAS_APPL	Application

Prerequisites

Admission Category IGSAD036

Application Detail Codes IGSAD058

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Source Types window

Steps

Enter data in each field of the window as described in the table and save your work.

Table 4–15 Source Types Window Description

Field Name	Type	Features	Description
Source Type	required		person data source type
Description	optional		source type description
System Source Type	required	list of values	system-defined source type
Admission Category	optional	list of values	person's admission category
Inquiry Person Type	optional	list of values	inquiry based on person type
Inquiry Funnel Status	optional	list of values	inquiry based on funnel status
Inquiry Method	optional	list of values	inquiry method such as phone, referral
Inquiry Entry Status	optional	list of values	inquiry entry status such as research or graduate
Closed	optional	check box	if selected, prevents further use of the source type

4.5.2 Setting Up Match Criteria Sets IGSPE022

A source type describes the source of person data used in match criteria, for example, record imports, manual forms-based data entry, self-service data entry, and prospect list sets. A user-defined source type will be mapped to a system source type. Optionally, a source type can be mapped to an Admission category.

The source types procedure enables users to set up source type records that describe person data organization.

UK Note: Match set criteria should be defined for source types UCAS_PER and UCAS_APPL. The match set names for the source type UCAS_PER should be set to UCAS_PER. Similarly, the match set names for the source type UCAS_APPL should be set to UCAS_APPL.

Prerequisites

Source Types IGSPE021

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Setup > Match Criteria Sets window

Steps

Enter or query data in each field of the window as described in the table and save your work.

Table 4–16 Match Criteria Sets Window Description

Field Name	Type	Features	Description
Source Type	required		source type code
Description	required		source type description
System Source Type	required		system-defined source type
Closed	optional	check box	if selected, prevents further use of the source type
Match Sets Region			
[Data Coordination check box]	optional	check box	If selected, data in the header region is automatically refreshed and coordinated with data in the footer region; if deselected, data in the Match Criteria Sets window is refreshed only when the user clicks in the Match Sets region. Leave deselected to speed up performance when querying records.
Match Set Name	required		match criteria set name
Description	optional		match criteria set description
Partial If Null	optional	check box	if selected, indicates that the match criteria set is a partial subset of the corresponding match criteria set
Closed	optional	check box	if selected, prevents further use of the match set name
Data Elements Region			
Data Meaning	default, display only		match set data meaning
Value	default, display only		data meaning value In some cases, this is enterable through a list of values, based on which Source Type and which Data Element.

Table 4–16 Match Criteria Sets Window Description

Field Name	Type	Features	Description
Exact	optional	check box	if selected, matches criteria set with exact data element
Drop If Null	optional	check box	This means that if any of the data elements included for exact match is null, then that data element must be ignored and the exact match duplicate check done without that data element If the Partial If Null in the Match Sets region is not checked, the Drop If Null can not be checked.
Partial	optional	check box	if selected, matches partial criteria set with data element Note: If the Exact check box is not selected, the Partial check box cannot be selected.

4.6 Person Holds

Holds restrict student access to services, such as copying academic records or certificates of results, and control aspects of student enrollments. If a hold exists on a student, an Holds Exist or Administrative Hold dynamic prompt is displayed in relevant windows, such as the Student Enrollments window.

UK Note: Match set criteria should be defined for the source types UCAS_POR and UCAS_APPL. The match set names for the source type UCAS_PER should be set to UCAS_PGR and similarly the match set name for the source type UCAS_APPL should be set to UCAS_APPL.

The system categorizes holds as follows:

- academic, applied when a student’s academic performance is poor, for example, for failure to make satisfactory program progress or for failure in a unit

Note: Academic holds should only have academic effects associated with them.

- administrative, applied because a student fails to meet an administrative requirement or requirements, for example, for failure to pay a fee or to return equipment

Note: Administrative holds should only have administrative effects associated with them.

External holds, holds applied by external systems, must raise a business event for setting or releasing an external hold. This hold is set or released through a workflow process.

A hold has some or all of the following components:

- Hold Type
- Hold Effects and Levels
- Hold Detail

Hold Type

Each hold type is institution-defined and describes the reason for the hold or its expected result. Each hold type must be categorized as either academic or administrative. Typical examples include the following:

- **SUSPENDED**, an administrative hold that prevents a student from gaining admission, enrolling, or reenrolling in a program
- **PROBATION**, an academic hold that restricts or controls a student's enrollment within a specific program or group of programs

Hold Effects and Levels

Each hold type must have at least one default hold effect. Numerous system-defined hold effects exist that can be attached to hold types, subject to certain rules.

Some hold effects are designed mainly for academic hold types, such as exclusion from enrollment in a specific program, and exclusion from admission and enrollment in a specific program group.

Other hold effects are designed mainly for administrative hold types, such as issue of identification card blocked, and all services withdrawn to be reinstated when obligations met.

Each hold effect has a system-defined level or hierarchy, 1, 2, or 3. The system prevents an hold effect of one level from being combined with an hold effect of a different level under the same hold type. For example, the hold effect of mailing of program materials blocked, is classified as a level 1 effect. It can be combined with other level 1 effects such as or release of results blocked, and use of information booth blocked, but not with a level 2 effect. All services withdrawn to be reinstated when obligations met, or with a level 3 effect and all services revoked.

Level 1 effects have a narrow focus, such as the blocking of a specific service or restriction of a particular aspect of a student's enrollment in a specific program. Level 2 effects have a broader focus and either incorporate or take precedence over level 1 effects of the same category. Level 3 effects have the broadest focus and take precedence over all other levels.

Several hold effects are considered positive and several are negative. Negative effects, restrict a student program enrollment. Positive effects, enrollment in a specific unit required, require a student enroll in a particular manner. Both positive and negative effects cannot be attached to the same hold type.

The Apply to Program indicator determines whether the application of certain hold effects is restricted to existing student program attempts or can be applied more broadly. For example, enrollment restricted to the specified attendance type, the Apply to Program indicator is set to YES and can only be applied to an existing student program attempt. For exclusion from admission and enrollment in a specific program, however, the Apply to Program indicator is set to NO. This enables a program exclusion to be applied to existing student program attempts and any other programs the student is prevented from entering.

Hold Detail

Certain hold effects require additional details be entered when applied to a particular student. For example, when applying exclusion from enrollment in a unit within a specific program, one or more unit codes must be entered together with a program code. Likewise, enrollment restricted to less than or equal to a specified credit point value, requires the credit point value to be specified together with a program code.

Maintenance of this hold reference data is typically performed using the following windows:

- System Hold Effect Types window for maintaining descriptions of effects
- Person Hold Types window for adding, maintaining, and closing institution-defined hold types and their default effects

Institution-defined hold types are subsequently applied to individual students using the following windows:

- Person Hold Details window
- Person Hold Effects window

Holds can either be created and released manually or automatically by running the Set Person ID Group Holds and Release Person ID Group Holds concurrent processes.

Student Finance users can also enter financial holds against students.

Security for Applying and Releasing a Hold

Any user who has been granted access to the Person Holds Details window and the concurrent manager process for Releasing of a Hold has the ability to release an

administrative hold category. Any person who has the same responsibility as the person who applied the hold has the ability to release holds.

The hold authorizer responsibility is the responsibility of the person who assigns the hold. The hold authorizer must have a person type of Staff.

The authorizing responsibility is the responsibility assigned by the hold authorizer which allows other users with the same responsibility to release the hold.

Administrative holds can be applied or released using the hold authorizer and authorizing responsibility functionality.

Academic holds can be released without this functionality. Academic holds are placed by the Progression subsystem and do not require hold authorizers. Academic holds may not be manually applied.

Holds are released in either the Person Hold Details window or through the Release Person ID Group Holds concurrent process.

All users given access to the Person Hold Detail window must have a Trading Community Architecture person associated through the Customer attribute for an Oracle Application user account. A user has an assigned responsibility.

Only holds of Administrative hold category can be applied or released using the responsibility mechanism.

Holds of the Academic hold category do not need to provide hold authorizer or authorizing responsibility.

A Hold Authorizer is the person who is logged into the Oracle Student System application and has granted access to the Person Hold Details window. In addition, a hold authorizer must have a Staff person type.

Any user who does not have person information associated to their user account does not have the ability to create a hold in Person Hold Details window and Set Person ID Group Holds concurrent manager process.

Only users with the same responsibility as the authorizing responsibility for the hold may release a hold in the Person Hold Details window and in the Release Person ID Group Holds concurrent manager process.

4.6.1 Setting Up System Hold Effect Types IGSEN041

Use this procedure to set up the attributes of predefined system hold effect.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Holds > System Hold Effect Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–17 System Hold Effect Types Window Description

Field Name	Type	Features	Description
Description	Default, display only		System hold effect type
Level	Default, display only		Value from 1 to 3 indicating the hierarchy of each hold effect type, with 3 being the highest
Apply To Program	Default, display only	Check box	If selected, indicates that system hold effect type is applied to an existing program
Closed	Optional	Check box	If selected, closes the system hold effect type to prevent further use

4.6.2 Setting Up Person Hold Types IGSEN042

The Person Hold Types window is used by system administrators or subsystem specialists to enter and maintain institution-defined hold types and associate them with effect types.

You can also alter the description of hold types, associate a hold category with a hold type, close hold types to prevent further use, and enter hold effects applicable to a student based on the associated hold type.

Hold categories are used to identify two group of hold effects. At least one hold effect must be attached to a hold type prior to saving. Hold types cannot be deleted, but can be closed to prevent further use. The effects attached to a hold type are applicable to students when a hold type is entered against the student.

You cannot attach academic hold effect types to administrative holds. Only administrative effects can be assigned to an administrative hold type. Academic hold types can have both administrative and academic effects.

The following table describes academic holds:

Table 4–18 Academic Holds

Academic Hold	Meaning
EXC_COURSE	Excluded from admission and enrollment in a specific program
EXC_CRS_GP	Excluded from admission and enrollment in a program group
EXC_CRS_U	Excluded from enrollment in unit within a specified program
EXC_CRS_US	Excluded from enrollment in a specific program unit set
RQRD_CRS_U	Enrollment in a specific unit Required
RSTR_AT_TY	Enrollment restricted to the specified attendance type
RSTR_GE_CP	Enrollment restricted to greater than or equal to nominated credit point
RSTR_LE_CP	Enrollment restricted to less than or equal to nominated credit point

The following table describes administrative holds:

Table 4–19 Administrative Holds

Administrative Hold	Meaning
C_MTRL_BLK	Mailing of program materials blocked
DENY_EACT	Deny all enrollment activity
GRAD_BLK	Graduation blocked
IDCARD_BLK	Issue of Id card blocked
INFBTH_BLK	Use of information booth blocked
OTHER	Other
RESULT_BLK	Release of results blocked
RVK_SRVC	All services revoked
S_COR_BLK	System generated correspondence blocked
STOPREFUND	Stop refund

Table 4–19 Administrative Holds

Administrative Hold	Meaning
SUS_COURSE	Enrollment suspended in specific program for defined period
SUS_SRVC	All services withdrawn; to be reinstated when obligations met
TRANS_BLK	Issue of academic transcript blocked

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Holds > Person Hold Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 4–20 Person Hold Types Window Description

Field Name	Type	Features	Description
Hold Type	Required		User-defined hold type
Description	Required		Description of hold type
Hold Category	Required	Drop-down list	Hold categories; values include academic, administrative
Closed	Optional	Check box	If selected, prevents further use of the hold type
Comments	Optional		Comments related to the hold type
Hold Type Effect		Button	Opens the Hold Type Effect window

4.7 Person Details IGSPE034

Person records include general information required for persons affiliated with an institution. This includes students, assessment supervisors, faculty, staff, administrators, and system users. Person detail records hold the highest level of general detail about a person. Person records can be created and existing records can be modified for any type of person.

All of the details about Person Details entry can be found in the *Oracle Student System User's Guide*.

The only required setup of a person as a prerequisite is in Program Structure and Planning. You must set up an Instructor for Unit Section Occurrences and a Coordinator for Units.

Person Details must be completed during setup of Oracle Student System to create administrative person with Person Type Staff. The staff persons will be associated with related setup values during later setup of Oracle Student System. See *Oracle Student System User Guide* to create person details.

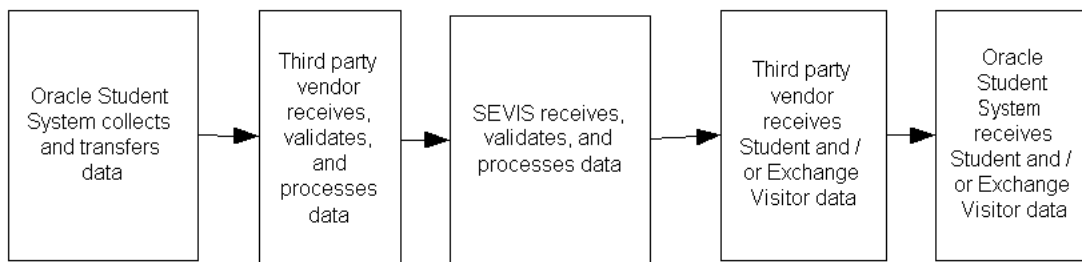
4.8 SEVIS Reporting

The Student and Exchange Visitors Information System (SEVIS) collects and maintains information from schools or program sponsors for foreign students and exchange visitors. The purpose of SEVIS is the facilitation of timely reporting and monitoring of international students and exchange visitors in the United States.

SEVIS is an Internet-based application for electronically tracking, screening, and reporting on foreign students and exchange visitors to the United States. SEVIS enables schools and program sponsors to transmit electronic event notifications to the Immigration and Naturalization Service (INS) and Department of State (DoS) throughout a student's or exchange visitor's program in the US.

Government agencies are informed of status changes for international students and exchange visitors including admission at the port of entry (POE), program extensions, employment notifications, and changes in program of study.

The following figure shows the SEVIS and Oracle Student System data transfer process.

Figure 4–1 SEVIS Reporting

Oracle Student System collects and transfers data through the IGS: SEVIS Exchange Visitors Batch Process and IGS: SEVIS Non-Immigrant Batch Process to a third-party vendor. SEVIS receives, validates, and processes data and transfers this information third-party back to the third-party vendor. Then, Oracle Student System receives student or exchange visitor data through an internet connection.

4.8.1 Exchanging Data with SEVIS

There are two methods of exchanging data with SEVIS:

- Real-Time Data Exchange
- Batch Interface

Real-Time Data Exchange

The first method of exchanging data with SEVIS is a real-time data exchange over the Internet. Oracle Student System does not support this type of exchange.

Batch Interface

The second method of exchanging data with SEVIS involves a batch data exchange process. Oracle Student System creates a batch interface with SEVIS. The interface is a two-way communication interface performed in batch mode over the Internet. The third-party vendor exchange to SEVIS from the Oracle Student System interface consists of a series of requests and responses, providing Oracle Student System with the ability to upload student and exchange visitor data to a third-party vendor in DTD (Data Transfer Definition) format.

Oracle Student System collects student and exchange visitor data at the institutional level and provides that information to SEVIS, which is stored in a centrally located database. Oracle Student System sends to third-party vendor all new and/or updated student and exchange visitor data that needs to be processed. All data elements must be transmitted to the INS SEVIS within SEVIS's required period of

time of entry or updated into Oracle Student System. SEVIS receives each transmission and generates a set of validation data along with data required for the printing of the forms. You can access this data within SEVIS's required period of time by reconnecting to the SEVIS Batch Interface and requesting the current transfer of information.

Functionality Support for the Batch Interface

The SEVIS batch interface requires three-core functionality support from Oracle Student System, third-party vendor, and SEVIS. The three high-level functions are:

- generating and sending of XML files
- receiving XML files and validation results
- parsing and processing XML files

The SEVIS batch interface relies on XML technologies to carry out its back-end operations. All data transmitted through Oracle Student System adhere to XML specifications.

4.8.2 Oracle Student System and SEVIS Processing

Oracle Student System

- processes new and updated student or exchange visitor records and formats this data according to the specified SEVIS Batch Data Transfer Definition (DTD)
- parses XML file and stores SEVIS identifiers since they are required for later updates.
- processes error transactions by marking records that were unsuccessfully processed in SEVIS for later retransmission

Each record should be marked as being sent to SEVIS. SEVIS does not accept duplicate transmissions of the same record or update. However, SEVIS does accept retransmissions of records that were incorrect.

The download file contains the data that is merged with the eligibility document template. It is the responsibility of your third-party software to print these documents.

You must correct these records and mark them for the next transmission.

To enforce data transmission security and data integrity, the SEVIS Batch Interface performs numerous security checks. First, the SEVIS Batch Interface uses an Internet protocol to require login and password validation at the time of data transmission.

Second, it uses digital certificates to authenticate the sender's identity. Third, SSL is used to encrypt the network packages prior to transmitting over the public Internet.

4.8.3 Minimum SEVIS Setup and Processing Steps

At minimum, to enable SEVIS functionality, you must:

- register your institution with SEVIS and enter the SEVIS IDs in Oracle Student System as alternate IDs (SEVIS program code and SEVIS school code)
- assign the SEVIS Administrator responsibility to the individual(s) at your institution responsible for international students
- set the IGS: SEVIS Enabled profile option to Yes
- set the SEVIS Debug Option profile option to Yes if you would like log file that lists the process flow
- select a third-party vendor to transfer and receive SEVIS data
- run the IGS: SEVIS Exchange Visitors Batch Process or IGS: SEVIS Non-Immigrant Batch Process to transfer data to a third-party vendor that connects to SEVIS

Note: This third-party vendor must accept DTD and not XML Schema based messages.

- receive data processed by SEVIS through third-party vendor

Note: To make person data information changes, the individual at your institution responsible for international students must be assigned OSS Super User Responsibility.

Note: All lookup values are seeded and cannot be altered during implementation.

4.8.3.1 Setting Up XML Gateway

Prerequisites

ECX must be installed

Responsibility

System Administrator

Steps

Assign the XML Gateway Responsibility to a system administrator or DBA at your institution.

4.8.3.2 Define Hubs**Prerequisites**

ECX must be installed

Responsibility

XML Gateway

Navigation

Setup > Define Hub > Hub Definitions window

Steps

1. Enter a user-defined hub in the Hub field.

4.8.3.3 Setup Trading Partners**Prerequisites**

ECX must be installed

Responsibility

XML Gateway

Navigation

Setup > Trading Partner > Trading Partner Setup window

Steps

1. In the Trading Partner Type field, select Customer from the list of values.
2. In the Transaction Types field, select the seeded transaction types from the list of values.

Note: Enter SEVISI for inputting information from third-party vendor. Enter SEVISO for outputting information to third-party vendor.

3. In the Map field, select the associated map from the list of values.

Note: Enter IGS_SV_NI_IN for SEVIS-I and IGS_SV_NI_OUT for SEVIS-O.

Note: There are no maps for exchange visitors.

4.8.3.4 Entering SEVIS IDs for Institutions

Prerequisites

You must have obtained a SEVIS ID from SEVIS. You must have a SEVIS ID for both nonimmigrant students and exchange visitors.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Steps

1. Click Institutions.
2. Select your institution.
The Institutions window appears.
3. Click Institutions Details.
4. Select the Identifier Tab.
5. In the ID Type field, select SEVIS Identifier from the list of values.
6. Enter your SEVIS ID for non-immigrant students in the Alternate ID field.
7. In the ID Type field, select SEVIS Program Code from the list of values.
8. Enter your SEVIS ID for exchange visitors in the Alternate ID field.
9. Save your work.

4.8.4 Creating and Updating Exchange Visitor and Dependent Information

SEVIS requires information on exchange visitors and dependents when they are created in Oracle Student System. All data elements defined by SEVIS (required and optional) are stored in Oracle Student System.

The following information is created or updated:

- person citizenship
- person international dependent

- person international dependent terminate/activate
- exchange visitor
- person felony

The IGS: SEVIS Exchange Visitors Batch Process collects the necessary data when an exchange visitor and dependent information is created or updated.

4.8.5 IGS: SEVIS Exchange Visitors Batch Process Concurrent Processes

This concurrent process validates data to be sent to the third-party vendor to ensure data will be processed by SEVIS.

Note: This concurrent process is currently not supported by Oracle Student System. You can run the concurrent process to validate the data, but the data will not be sent to a third-party vendor.

Prerequisites

The profile option: IGS: SEVIS Enabled must be set to Yes.

Responsibility

SEVIS Administrator

Navigation

Run

The Submit a New Request window appears.

Select the Single Request radio button.

Click **OK**.

The Submit Request window appears.

In the Name field, select IGS: SEVIS Exchange Visitors Batch Process from the list of values for exchange visitors.

Steps

1. Click **OK**.

The Parameters window appears.

2. The optional parameter for this concurrent process is a Yes or No value from a list of values for validation purposes.

Select Yes to validate and transfer data.

Select No to validate data.

3. To apply the parameters, click **OK**.
4. To send the request to the concurrent manager, click **Submit**.
The Requests window appears.
5. To view the log file, select the appropriate Request ID and click **View Log**.
6. If there are any errors, make corrections and run the concurrent process again.
7. Close the window.

4.8.6 Creating and Updating NonImmigrant Information

SEVIS requires information on foreign students and dependents when they are created in Oracle Student System. All data elements defined by SEVIS (required and optional) are stored in Oracle Student System.

The following information is created or updated:

- person citizenship
- person international dependent
- person international dependent terminate/activate
- person international non-immigrant student (I-20)
- person felony

The IGS: SEVIS Non-Immigrant Batch Process collects the necessary data when a foreign student and dependent information is created or updated.

4.8.7 IGS: SEVIS Non-Immigrant Batch Process Concurrent Processes

This concurrent process validates data to be sent to the third-party vendor to ensure data will be processed by SEVIS.

Prerequisites

The profile option: IGS: SEVIS Enabled must be set to Yes.

Responsibility

SEVIS Administrator

Navigation

Run

The Submit a New Request window appears.

Select the Single Request radio button.

Click **OK**.

Select IGS: SEVIS Non-Immigrant Batch Process from the list of values for non-immigrant students.

Steps

1. Click **OK**.

The Parameters window appears.

2. The optional parameter for this concurrent process is a Yes or No value from a list of values for validation purposes.

Select Yes to validate and transfer data.

Select No to validate data.

3. To apply the parameters, click **OK**.

4. To send the request to the concurrent manager, click **Submit**.

The Requests window appears.

5. To view the log file, select the appropriate Request ID and click **View Log**.

6. If there are any errors, make corrections and run the concurrent process again.

7. Close the window.

4.8.8 Transferring Data from Oracle Student System to Third-Party Vendor

Oracle Student System validates all data before transferring to a third-party vendor. After validation, the data is converted into DTD format and transferred by initiating a connection to SEVIS using an internet protocol.

The IGS: SEVIS Exchange Visitors Batch Process and IGS: SEVIS Non-Immigrant Batch Process do the following:

- process new and updated student or exchange visitor records in Oracle Student System
- perform validation on records

Note: The validation ensure that all required information, based on SEVIS data elements, is available.

An error report (log file) is generated for all records that fail validation. Records that fail validation will not be transferred to SEVIS. You must correct these records and resubmit them.

The valid records are converted into XML format, in accordance Document Type Definition (DTD) provided by SEVIS. The DTD is a set of rules that defines the semantic rules of the XML file. Each record must be marked as being sent to SEVIS.

SEVIS does not accept duplicate transmissions of the same record or update. However, SEVIS does accept retransmissions of records that were incorrect.

4.8.9 IGS: Purge Active Exchange Visitor Batch Concurrent Processes

Use the IGS: Purge Active Exchange Visitor Batch concurrent process to rerun the IGS: SEVIS Exchange Visitor Batch Process concurrent process. You only want to run the IGS: Purge Active Exchange Visitor Batch concurrent process if there is a lost message between SEVIS and the third-party vendor and the status of the batch remains active. There might be a lost message if you never receive a message back from SEVIS.

This concurrent process purges the batch, removes the active status, and enables you to run the IGS: SEVIS Exchange Visitor Batch Process concurrent process again.

Prerequisites

The profile option: IGS: SEVIS Enabled must be set to Yes.

Responsibility

SEVIS Administrator

Navigation

Run

The Submit Request window appears.

In the Name field, select IGS: Purge Active Exchange Visitor Batch.

Steps

1. Click **OK**.

The Parameters window appears.

2. There are no parameters for either concurrent process.
3. To send the request to the concurrent manager, click **Submit**.

The Requests window appears.

4. To view the log file, select the appropriate Request ID and click **View Log**.
5. If there are any errors, make corrections and run the concurrent process again.
6. Close the window.

4.8.10 IGS: Purge Active Non-Immigrant Batch Concurrent Processes

Use the IGS: Purge Active Non-Immigrant Batch concurrent process to rerun the IGS: SEVIS Non-Immigrant Batch Process concurrent process. You only want to run the IGS: Purge Active Non-Immigrant Batch concurrent process if there is a lost message between SEVIS and the third-party vendor and the status of the batch remains active. There might be a lost message if you never receive a message back from SEVIS.

This concurrent process purges the batch, removes the active status, and enables you to run the IGS: SEVIS Non-Immigrant Batch Process concurrent process again.

Prerequisites

The profile option: IGS: SEVIS Enabled must be set to Yes.

Responsibility

SEVIS Administrator

Navigation

Run

The Submit Request window appears.

In the Name field, select IGS: Purge Active Non-Immigrant Batch.

Steps

1. Click **OK**.

The Parameters window appears.

2. There are no parameters for either concurrent process.
3. To send the request to the concurrent manager, click **Submit**.

The Requests window appears.

4. To view the log file, select the appropriate Request ID and click **View Log**.
5. If there are any errors, make corrections and run the concurrent process again.

6. Close the window.

4.8.11 SEVIS Seeded Lookups

There are several seeded lookup values for the following lookups:

- Country Codes
- DoS Post Codes
- Dependent Type Codes
- Dependent Termination Reason Codes
- Drop Below Full Time Reason Codes
- Employment Type Codes
- Off-Campus Employment Reason Codes
- Employment Time Codes
- Reprint Request Reason Codes
- Gender Codes
- Student Educational Level Codes
- Student Creation Reason Codes
- Student Termination Reason Codes
- Name Suffix Codes
- Visa Type Codes
- Port of Entry (POE) Codes
- State Codes
- Major /Minor Codes for Student
- Exchange Visitor Creation Reason Codes
- Exchange Visitor Program End Reason Codes
- Exchange Visitor Termination Reason Codes
- Exchange Visitor Program Category Codes
- U.S. Government Agency Codes
- International Organization Codes

- Exchange Visitor Position Codes

To view lookup types, query in the Lookups window using the following:

- SV_%
- PE_SV%
- PE_US%

See Appendix C, "Lookups" for information on lookups.

Systemwide Services: Calendar

5.1 Calendar Overview

The Calendar windows record the following information:

- periods of time
- significant events and dates linked to periods of time

Calendars are used to define data and trigger functions in other subsystems. Many types of calendar, each representing different time periods in the academic and administrative life of an institution, can be defined.

Calendars and dates are maintained in the Calendar windows but are used by all subsystems. Each functional area controls its own calendar and relationships. For example, calendars used for student enrollment can be used in the Enrollments subsystem.

Since Calendar configuration affects all other subsystems, the ability to create and maintain an institution's calendars must be restricted to a limited number of system administrators and subsystem specialists who understand system-wide features and functionality.

5.1.1 Terminology

In Student System, a traditional calendar is represented by a calendar instance. A calendar instance is defined by its start and end dates and the calendar category to which it is assigned.

A calendar event is represented by a date alias. An event can occur in several different calendars or a number of times in one calendar instance. Each specific occurrence of an event is represented by a date alias instance.

The following table describes Calendar terminology.

Table 5–1 Calendar Terminology

Term	Traditional Calendar Equivalent	Defined By	Examples
calendar category	Gregorian, Julian, Lunar, Jewish, Islamic, Mayan, Chinese, etc.	system-defined	TEACHING, ACADEMIC, FEE
calendar type	annual, monthly, civil, religious, fiscal, etc.	institution-defined within a calendar category	standard academic year, semester 1, semester 2
calendar instance	annual calendar, such as calendar for 2002	start and end dates specified by institution for a particular calendar type	semester 1, 2002; start 01-SEP-2002, end 01-JAN-2003
date alias	event, such as Labor Day holiday or start of term or institution holiday	institution-defined	start of semester1; census date
date alias instance	when event occurs, such as the specific date of Labor Day holiday in one particular year	date specified by institution and assigned to a particular calendar instance	start of semester1, 01-SEP-2002

5.2 Setting Up Teaching Period Codes IGSAD017

Teaching period codes are mapped to institution-defined teaching calendars in the Calendar Types window. The usual teaching periods are fall, spring, summer, and winter.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Teaching Period Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 5–2 Teaching Period Codes Window Description

Field Name	Type	Features	Description
Teaching Period Code	Required		Code of user-defined teaching period
Description	Required		Description of teaching period: fall, spring, summer, winter
Closed	Optional	Check box	If selected, prevents further use of teaching period

5.3 Calendar

This section includes information on the following topics:

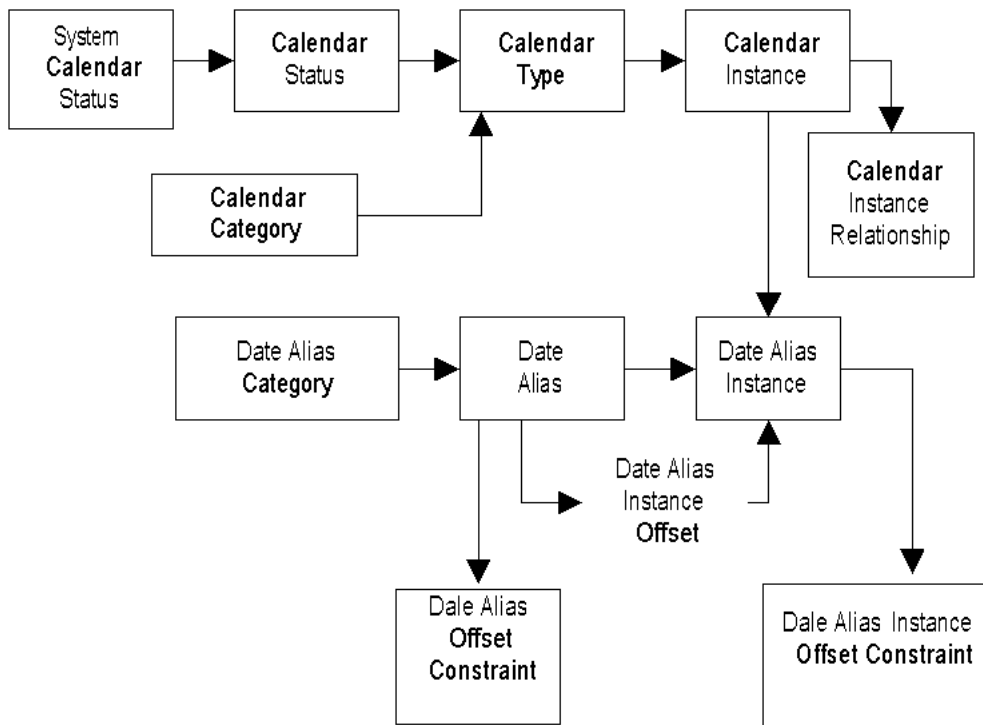
- Data Dependencies
- Calendar Instance Relationships
- Calendar Categories

Data Dependencies

Student System requires that some data be defined before other data can be added.

Note: System calendar status and calendar category are system-defined values.

The following figure shows the order for entering Calendar data using the various windows in the Calendar subsystem. For example, date alias categories must be set up using the Date Alias Categories window before adding date aliases because the system requires each date alias to be assigned a category.

Figure 5–1 Calendar Data Dependencies**Calendar Instance Relationships**

Calendar instances can be organized in superior and subordinate relationships. One calendar instance can be associated with several superior or subordinate calendar instances.

Calendar Categories

Calendar categories are system-defined calendar types. Each calendar type must be assigned a calendar category to enable Student System to determine associated functionality for each type of calendar. Calendar categories are selected through lists of values.

Note: A date alias may be linked to a calendar category, restricting the use of the date alias to calendars of that category only.

For example, linking the date alias ST_LECT to the calendar category TEACHING means that instances of the date alias ST_LECT can only be created in TEACHING

calendar instances. The date alias ST_LECT cannot be created in all other calendar category calendar instances.

Calendar categories include the following:

- ACADEMIC
- AWARD
- FEE
- HOLIDAY
- TEACHING
- ADMISSION
- ENROLLMENT
- FINANCE
- LOAD
- USER-DEFINED
- ASSESSMENT
- EXAM
- GRADUATION
- PROGRESSION

Note: Calendar category Award is used in Financial Aid only.

5.3.1 Setting Up Calendar Statuses IGSCA001

Administrators can create calendar statuses that have specific meaning to the institution, but the statuses created by administrators must be assigned a status that the system recognizes to provide functionality.

The following table shows an example of a calendar statuses assigned by administrators and the corresponding statuses in the system calendar.

Table 5–3 Administrator-Created and System Calendar Status

Administrator-Created Calendar Status	System Status
Current	Active

Table 5–3 Administrator-Created and System Calendar Status

Administrator-Created Calendar Status	System Status
Projected	Planned
Suspended	Inactive

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendar Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 5–4 Calendar Statuses Window Description

Field Name	Type	Features	Description
Calendar Status	Required		Institution-defined status of a calendar indicating its level of activity Note: Calendar status must be assigned to a system-defined status. Note: Users cannot delete a calendar status already assigned to a calendar instance.
Description	Required		Calendar status description
System Status	Required	List of values	System-defined calendar status; Active, Inactive, Planned
Closed	Optional	Check box	If selected, prevents further use of calendar status

5.3.2 Setting Up Calendar Types IGSCA002

A calendar type represents a meaningful timespan in the academic or administrative calendar. An institution can define any number of calendar types for use throughout the system; each must be assigned a system-defined calendar category for functionality within the system. Details regarding the specific setup

requirements of calendars for other subsystems are provided in the documentation for those subsystems.

The calendar types procedure creates and assigns calendar types and specific instances or occurrences of these calendars.

Adding a calendar type permits its use for the creation of calendar instances.

Examples of a calendar type for the calendar category Teaching are as follows:

- ACAD-YR for academic year
- SEM-1 for semester 1
- SEM-2 for semester 2

Calendar Instances

A calendar instance defines a particular occurrence of a calendar type. A calendar instance is defined by assigning a start and an end date to a calendar type.

Instances with a calendar category of Academic, Teaching, Admission, Load, Award, and Progression must be assigned an alternate code. The alternate code is a simple and quick way of identifying a particular calendar instance without having to enter the calendar type, start date, and end date. The alternate code is used to speed data entry in other subsystems.

New calendars can also be created by rolling over information associated with an existing calendar instance. This process is described in the Rollover Calendar Instance procedure.

For example, a calendar instance defining Semester 2 Teaching Period for 2002 could be created by assigning the start and end dates of January 1, 2002, and June 30, 2002, to a calendar type SEM-2, and assigning it the alternate code SEM2-02.

Prerequisites

Teaching Period Codes IGSAD017

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendars > Calendars window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 5–5 Calendars Window Description

Field Name	Type	Features	Description
Calendar Type	Required		Calendar type representing a specific time span Note: Users can delete a calendar type only if there is no existing calendar instance. It is not advisable to modify a calendar type with an existing calendar instance.
Calendar Category	Required	List of values	category to which the calendar type belongs; for example, academic calendar, load calendar, teaching calendar
Description	Required		Calendar type description
Abbreviation	Optional		Abbreviation for calendar type; required for Admission category calendar types
Teaching Period Code		List of values	Automated result transfer system code required for a calendar of category teaching; Optional for other calendar categories
Closed	Optional	Check box	If selected, prevents further use of the calendar type
Notes	Optional		Additional information on calendar type
Calendar Instance Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Calendar Instance region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Calendar Instance region is refreshed only when users navigate to the Start Date field in the Calendar Instance region. Leave deselected to speed up performance when querying records.
Effective Dates > From	Required		Calendar type effective start date
Effective Dates > To Date	Required		Calendar type effective end date
Calendar Status	Required		Status of calendar type; Active, Inactive, Planned Note: Users cannot delete calendar instances that have the calendar status of Active or Inactive. Note: Users cannot change calendar status from Planned to Inactive, Inactive or Active to Planned.

Table 5–5 Calendars Window Description

Field Name	Type	Features	Description
Alternate Code	Required for Academic, Admission, Load, Teaching, Progression, and Award calendar categories		Alternate code for calendar type; Defaults to the year of the calendar start date for academic calendar category
Description	Required		Description of calendar instance; for example, FALL 16 WEEK TEACHING 2002
Calendar Relationships		Button	Opens Calendar Instance Relationships window to create superior and subordinate calendar relationships
Date Alias Instances		Button	Opens Calendar Date Alias Instances window to create date alias instances for the calendar instance
Rollover Calendar		Button	Opens Rollover Calendar Instance window to rollover calendar instances

5.3.3 Setting Up Rollover Calendar Instances IGSCA003

A calendar instance defines a particular occurrence of a calendar type and is defined by assigning a start and end date to the calendar type. A calendar instance can have many date alias instances, also known as calendar events, associated with it. It can also have a number of subordinate calendars related to it.

The rollover calendar instance procedure creates new calendars based on an existing calendar instance and its related subordinate calendar instances and associated date alias instances. All new calendars resulting from this process have a Planned status.

The Rollover Calendar Instance window is displayed as part of the process that enables a calendar instance, its related subordinate calendar instances, and associated date alias instances to form the basis for the creation of a new calendar instance. If calendar instances are created in this way, related information is also created without having to laboriously re-enter data.

The Rollover Calendar Instance window displays the calendar instance carried forward from the Calendar Types window to be rolled over and the start and end dates of the new calendar. For example, calendar instance Semester1, in date format 09/01/02 > 12/01/02, can be used to create the new calendar instance Semester1, in

date format 09/01/03 > 12/01/03, using the rollover process. The process also carries forward to the new calendar any related date alias instances, such as start of lectures, and all subordinate calendars, such as exam or fee calendars, that were attached to the source calendar.

The rollover process cannot be undone. It is necessary to manually delete all new details to reverse the process.

When rolling over a calendar that has a superior calendar, the system determines if a link needs to be created from the new calendar to a suitable existing superior calendar. This applies, particularly, if a set of calendars was rolled over and a new subordinate calendar is associated with a preexisting superior calendar and rolled forward separately. The system attaches the rolled subordinate to the previously rolled over superior calendar.

The rollover end date for the new calendar is calculated by the system by adding the difference in days between the start dates of the new and existing calendars to the end date of the existing calendar. If the start day and month of the two calendars are identical, the system recognizes this and makes the end day and month identical, regardless of leap years.

Calendar Instance Relationships in the Rollover Process

New calendar instances can be created and linked to superior calendars that are already rolled forward or newly created. As part of the rollover process, if a new calendar instance is linked to a superior calendar and then rolled forward, the system creates a link to a suitable superior calendar if one exists.

If a new calendar does not have the desired relationship specified, this region enables a user to specify a superior calendar to which the calendar being rolled over is linked. For example, the academic calendar instance for 2002 can be rolled over into 2003 with all its subordinate calendars and would not require a superior calendar as it is the superior calendar. After running the Calendar rollover process, the Rollover Calendar Report should be produced to verify results of the rollover process.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendars window

Steps

1. Query the appropriate record.
2. Click Rollover Calendar.

The Rollover Calendar Instance window appears with the selected calendar instance as the context record in the top region.

3. Enter data in each field of the window as described in the table. Save your work.

Table 5–6 Rollover Calendar Instance Window Description

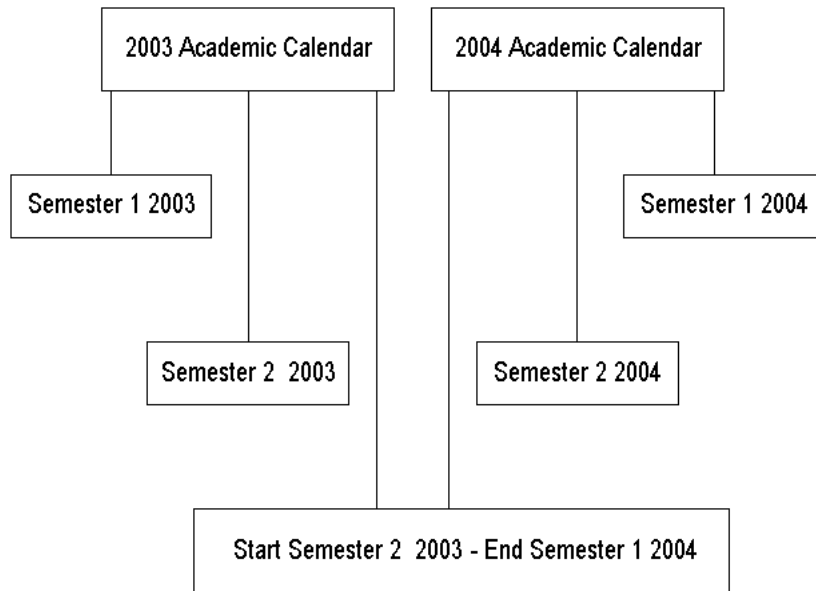
Field Name	Type	Features	Description
Calendar Type	Default, display only		Institution-defined name of a type of calendar used within the organization
Effective Dates	Default, display only		Effective start and end dates of calendar type
Effective Rollover Dates	Required	Calendar	Effective start and end dates of new calendar instance Note: The rollover start date must be after the start date of the existing calendar instance. The future effective period will be the same length in time as the current effective period.
Calendar Instance Relationship			
Superior Calendar Type		List of values	Superior calendar type to which the calendar being rolled over is linked
[Description]	Display only		Superior calendar type description
Effective Dates	Display only		Effective start and end dates of superior calendar instance
Rollover Calendar		Button	Initiates the calendar rollover process Note: A calendar cannot be rolled over to an instance that already exists. Users cannot rollover inactive calendar instances and calendar instances with closed calendar type.

5.3.4 Setting Up Calendar Instance Relationships IGSCA004

The calendar instance relationships procedure sets up relationships between superior and subordinate calendars.

The following figure shows an example of how calendar instances can be organized in superior and subordinate relationships, with many levels of relationships possible. For example, a calendar instance for the Semester 1 2002 examination period can be added in a subordinate relationship to 2002 Academic Calendar.

Figure 5–2 Sample Calendar Instance Relationship



2003 Academic Calendar is a superior calendar. Semester 1 2003, Semester 2 2003, and Start Semester 2 2003 - End Semester 1 2004 are subordinate.

2004 Academic Calendar is a superior calendar. Start Semester 2 2003 - End Semester 1 2004, Semester 1 2004, and Semester 2 2004 are subordinate.

Start Semester 2 2003 - End Semester 1 2004 has a relationship to both superior calendars.

5.3.5 Calendar Relationship Rules

Since other subsystems depend on calendar relationships, the system validates them when they are set up. The following table describes rules for setting up calendar relationships.

Table 5–7 Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships
USERDEF	all	all	N/A
ACADEMIC	USERDEF	ADMISSION ASSESSMENT ENROLLMENT EXAM FEE LOAD (ACADEMIC TERM) PROGRESS TEACHING USERDEF HOLIDAY GRADUATION	ADMISSION ASSESSMENT ENROLLMENT EXAM FEE LOAD (ACADEMIC TERM) PROGRESS TEACHING
ADMISSION	ACADEMIC TEACHING USERDEF	ENROLLMENT USERDEF LOAD (ACADEMIC TERM)	ACADEMIC LOAD (ACADEMIC TERM) ENROLLMENT
ENROLLMENT	ACADEMIC ADMISSION USERDEF	USERDEF	ACADEMIC ENROLLMENT
ASSESSMENT	ASSESSMENT ACADEMIC USERDEF	ASSESSMENT TEACHING	ACADEMIC TEACHING
EXAM	EXAM ACADEMIC USERDEF	EXAM TEACHING USERDEF	ACADEMIC TEACHING

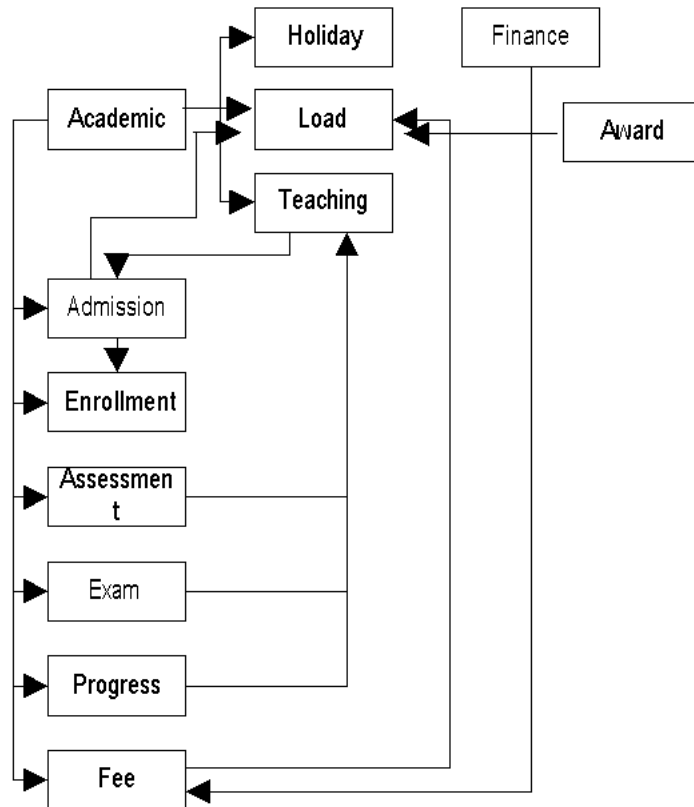
Table 5–7 Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships
GRADUATION	ACADEMIC USERDEF	USERDEF	N/A
FEE	ACADEMIC FINANCE USERDEF	LOAD (ACADEMIC TERM) USERDEF	ACADEMIC
FINANCE	USERDEF	FEE USERDEF	N/A
LOAD (ACADEMIC TERM)	ACADEMIC FEE USERDEF ADMISSION PROGRESS AWARD	USERDEF	ACADEMIC ADMISSION AWARD
PROGRESS	ACADEMIC USERDEF	TEACHING USERDEF LOAD (ACADEMIC TERM)	ACADEMIC TEACHING

Table 5–7 Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships
TEACHING	ACADEMIC ASSESSMENT EXAM PROGRESS USERDEF	ADMISSION USERDEF	ACADEMIC ASSESSMENT EXAM PROGRESS
HOLIDAY	ACADEMIC HOLIDAY USERDEF	HOLIDAY USERDEF	N/A
AWARD	USERDEF	LOAD (ACADEMIC TERM) USERDEF	LOAD (ACADEMIC TERM)

The table depicts the information in the figure and shows the minimum amount of calendars that must be set up for Oracle Student System to work. The user-defined calendars are not represented in the diagram because they can appear anywhere in the calendar relationship.

Figure 5–3 Calendar Relationships**Prerequisites**

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendars window

Steps

1. Query the appropriate record.
2. Click **Calendar Relationships**.

The Calendar Instance Relationships window appears.

- 3. Enter data in each field of the window as described in the table.
- 4. Save your work.

Table 5–8 Calendar Instance Relationships Window Description

Field Name	Type	Features	Description
Superior Calendars Region			
Calendar Type	Required	List of values	Superior calendar instance type Note: If the context calendar instance is active, superior calendar must be active; if context calendar instance is inactive, superior calendar can be active or inactive; if context calendar instance is planned, superior calendar can be active or planned
Description	Display only		Calendar type description
Effective Dates	Display only		Effective from and to dates of calendar type
Status			Calendar type status; Active, Inactive, or Planned
Calendar Instance Region			
Calendar Type	Default, display only		Calendar instance type
Description	Default, display only		Calendar type description
Effective Dates	Display only		Effective from and to dates of calendar type
Status	Default, display only		Calendar type status; Active, Inactive, or Planned
Subordinate Calendars Region			

Table 5–8 Calendar Instance Relationships Window Description

Field Name	Type	Features	Description
Calendar Type	Required	List of values	<p>Subordinate calendar instance type</p> <p>Note: If the context calendar instance is active, subordinate calendar can be active, inactive, or planned; if context calendar instance is inactive, subordinate calendar must be inactive; if context calendar instance is planned, superior calendar must be planned.</p> <p>Note: A calendar instance that belongs to a teaching category cannot have a subordinate calendar of academic or enrollment category. A calendar instance of enrollment category cannot have subordinate calendars.</p> <p>A calendar instance of load category must have a load research percentage assigned to it.</p>
Description	Display only		Calendar type description
Effective Dates	Display only		Effective start and end dates of calendar type
Status	Display only		Subordinate calendars' status
Load Research %	Optional		Load research percentage associated with the calendar type
Date Alias Instance Query		Button	Opens Date Alias Instances window to query date alias instances

5.4 Date Alias

A date alias is the institution-defined name of an event, not an actual date. Each date alias must be assigned a date alias category and can be assigned a calendar category. For example, END-LECT represents the last day of lectures in a teaching period. Some date aliases require an exact date representation.

Alterable Date Aliases

Not all date aliases can be altered. The table below indicates date aliases that can be altered to a future date.

Table 5–9 Alterable Date Aliases

Subsystem	Date Alias	Comments
Admissions	Last Day to Receive Admissions Applications	N/A

Table 5–9 Alterable Date Aliases

Subsystem	Date Alias	Comments
Admissions	Last Day to Change Program Preferences	Must be before Final Date of Receipt
Admissions	Final Date of Receipt	N/A
Admissions	Offer Response Date	N/A
Admissions	Short Admission Process Period	Must be after initialize admission period and before final date of receipt
Admissions	Admission Processing Tracking	N/A
Admissions	Post Admission Tracking	N/A
Enrollments	Start Cutoff	N/A
Enrollments	Record Cutoff	N/A
Enrollments	Program Completion Date	N/A
Enrollments	Record Open	N/A
Enrollments	Variation Cutoff	N/A
Enrollments	Sub Unit	N/A
Enrollments	Package Production	N/A
Enrollments	Form Due	N/A
Enrollments	Enrollment Rule Cutoff	N/A
Enrollments	Invalid Rule Cutoff	N/A
Enrollments	Enrollment Cleanup	N/A
Enrollments	Grading Schema	N/A
Enrollments	Lapsed	N/A
Advanced Standing; Academic Records	Unit Delete	Date after which advanced standing unit is granted can no longer be automatically deleted
Assessments; Academic Records	Assessment Item Variation Cutoff	N/A
Assessments; Academic Records	Midterm Marks/Grades Submission Start Date	N/A

Table 5–9 Alterable Date Aliases

Subsystem	Date Alias	Comments
Assessments; Academic Records	Midterm Marks/Grades Submission End Date	N/A
Assessments; Academic Records	Early Final Marks/Grades Submission Start Date	N/A
Assessments; Academic Records	Early Final Marks/Grades Submission End Date	N/A
Assessments; Academic Records	Final Mark/Grades Submission Start Date	N/A
Assessments; Academic Records	Final Mark/Grades Submission End Date	N/A
Examination; Academic Records	Examination Day #	N/A
Graduation; Academic Records	Graduation Start Date	N/A
Graduation; Academic Records	Graduation End Date	N/A
Graduation; Academic Records	Graduation Ceremony Date	N/A

Mandatory and Accurate Date Aliases

The date aliases in the following table are required and must be accurate when transactional processing occurs within the relevant calendar period.

These date aliases are only relevant when the related functionality is used in the defined calendar.

Table 5–10 Mandatory Date Aliases

Subsystem	Date Alias	Comments
Admissions	Initialize Admission Period	N/A
Admissions	Encumbrance Check Date	N/A
Admissions	Program Start Date	When student started program, once pass program start date cannot enroll

Table 5–10 Mandatory Date Aliases

Subsystem	Date Alias	Comments
Admissions	Mid Completion Period	Derives Graduation
Admissions	Summer Completion	Derives Graduation
Admissions	End of Year Completion	Derives Graduation
Academic Term; Academic Records	Start of Academic Term (Load Start)	N/A
Academic Term; Academic Records	End of Academic Term (Load End)	N/A
Academic Term; Academic Records	Census	N/A
Enrollments	Census Date	Student Load for a teaching period
Enrollments	Effective Enrollment Start Date	N/A
Enrollments	Load Effective	N/A
Enrollments	Start of Academic Year	N/A
Enrollments	Unit Delete	Derives Discontinuation; Must be accurate if present, otherwise optional for Administrative Unit Status Loads
Enrollments	Early Withdrawal	Derives Discontinuation; Must be accurate if present, otherwise optional for Administrative Unit Status Loads
Enrollments	Late Unit Withdrawal	Derives Discontinuation; Must be accurate if present, otherwise optional for Administrative Unit Status Loads
Enrollments	Late Unit Withdrawal > Fail	Derives Discontinuation; Derives Discontinuation; Must be accurate if present, otherwise optional for Administrative Unit Status Loads
Enrollments	Late Unit Withdrawal – Failed Grade Waived.	Derives Discontinuation; Must be accurate if present, otherwise optional for Administrative Unit Status Loads
Research; Enrollments	Effective Start Date	N/A
Research; Enrollments	Effective End Date	N/A

Table 5–10 Mandatory Date Aliases

Subsystem	Date Alias	Comments
Research; Enrollments	Withdrawal from Research	N/A
Research; Enrollments	Withdrawal from Research after Census Date	N/A
Progression; Academic Records	Effective End Date	N/A
Progression; Academic Records	Apply Start Date	N/A
Progression; Academic Records	End Benefit	N/A
Progression; Academic Records	End Penalty	N/A
Progression; Academic Records	Showcause	N/A
Progression; Academic Records	Appeal Cutoff	N/A
Progression; Academic Records	Hold End Date	N/A
Fee; Student Finance	Retroactive Date	N/A
Fee; Student Finance	Start Date	N/A
Fee; Student Finance	End Date	N/A
Fee; Student Finance	First Retention Date	N/A
Fee; Student Finance	Second Retention Date	N/A
Fee; Student Finance	Refund Period	N/A
Financial Aid	No NSLDS History Disbursement Offset	N/A
Financial Aid	Disbursement Expiration Offset	N/A

Table 5–10 Mandatory Date Aliases

Subsystem	Date Alias	Comments
Financial Aid	Verification Enforcement Date Offset	N/A
Financial Aid	Disbursement Offset	N/A

5.4.1 Setting Up Date Alias Categories IGSCA005

Date alias categories are institution-defined categories that provide a logical grouping of date aliases. For example, a category Withdrawal can be created to group date aliases representing events such as last day to withdraw without penalty or the last day to withdraw without a failing grade.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Date Alias Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 5–11 Date Alias Categories Window Description

Field Name	Type	Features	Description
Date Alias Category	Required		Institution defined category for categorizing date aliases with common attributes; for example, last day to withdrawal without penalty, last to withdrawal without a failing grade can be categorized as Withdrawal Note: Users cannot delete a date alias category already used in defining a date alias instance.
Description	Required		Date alias category description

5.4.2 Setting Up Date Aliases IGSCA006

Date alias is the generic name for a calendar event, not the actual occurrence of an event. A date alias is defined by its name and the date alias category to which it is

assigned. It can also be assigned to a calendar category that limits its use exclusively to calendar instances of the same category.

Date aliases do not have to be within the bounds of a calendar instance. For example, in the Enrollments subsystem, users may open an enrollment period for a term teaching period before the calendar start date.

For example, Census can be the date alias for any day on which census data is collected for reporting purposes. Census date can occur repeatedly in various teaching or load calendar instances throughout an academic year.

Using this window to create a date alias is the first step to defining the specific event in the institution's calendar. After the date alias is created then the occurrence or date can be assigned for a specified calendar instance.

Date Alias Offset Region

A relationship can be defined between two date aliases that specify that one occurs at a fixed interval before or after the other. This region is used to display and maintain this type of relationship between two date aliases. The user can ensure that no matter what date is assigned to the offset date alias, the subject date alias does not fall on specified days. This is done by clicking **Date Alias Offset Constraints** and specifying offset constraints details in the Date Alias Offset Constraints window.

For example, the last day of an examination period can always be 12 days after the first day of this period. When the two date aliases are assigned to a calendar instance and the first date is defined, the second date is automatically calculated as 12 days later.

In another example, a date alias for the submission of statistics to the government can be defined as always occurring one month after the census date. When these two date aliases are applied to a calendar instance and a date value for the census date is defined, a date value for submission of the statistics is automatically calculated as one month later. In this case the census date is called the offset date alias and the amount of time between the two dates is called the offset duration.

Date Alias Pair

Pairing date aliases indicates that two dates and every day between the two dates are represented by the relationship.

For example two date aliases, St-Brk and End-Brk, can define the start and end dates of a midsemester break. Pairing the dates defines the entire period of the break, inclusive of these two dates. When a date alias pair is created for date aliases

within a Holiday calendar instance, it effectively defines an institutional break, which is a date alias offset constraints.

Prerequisites

Date Alias Categories IGSCA005

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Date Aliases > Date Aliases window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 5–12 Date Aliases Window Description

Field Name	Type	Features	Description
Date Alias	Required		institution-defined name of an event; for example, END-LECT
Abbreviation	Required		short form of date alias
Description	Required		Date alias description
Date Alias Category	Required	List of values	Category consisting of a group of date aliases with common attributes; for example, Fee Dates, Teaching Dates
[Description]	Display only		Date alias category description
Notes	Optional		additional information on date alias
Calendar Category	Optional	List of values	Calendar category assigned to date alias; if assigned, limits the use of a date alias to calendar instances of assigned calendar category
Closed	Optional	Check box	If selected, prevents further use of the date alias
Date Alias Instances		Button	Opens Date Alias Instances window to assign date alias instance to a calendar instance
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Date Alias Offset region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Date Alias Offset region is refreshed only when users navigate to the Offset Date Alias field in the Date Alias Offset region. Leave deselected to speed up performance when querying records.

Table 5–12 Date Aliases Window Description

Field Name	Type	Features	Description
Date Alias Offset Region			
Offset Date Alias	Required	List of values	Date alias from which the date of another event is calculated by offset Note: Instances of the two date aliases must occur in the same calendar instance.
Offset Duration	Optional		Number of days, weeks, months, or years between two date aliases or two date alias instances with an offset relationship
Date Alias Pair Region			
Paired Date Alias	Required	List of values	Name of date alias with which the current date alias is paired
Date Alias Offset Constraints		Button	Opens Date Alias Offset Constraints window to set offset constraints

5.4.3 Setting Up Date Alias Offset Constraints IGSCA007

The date alias offset constraints procedure creates date alias instances that result from a date alias offset relationship set so that the date alias instance cannot fall on specified days.

The Date Alias Offset Constraints window is accessed by a navigation button in the Date Aliases window. In that window, a date alias can be defined in terms of an offset from another date alias. When an instance of the first date alias is created, the date of the second is calculated as the first date, plus or minus the offset.

This window is used optionally to ensure that the calculation of the second date results in that date falling on acceptable days. For example, the second date can be constrained to fall outside institution holidays, only on a weekday, only on a Wednesday, or any valid combination of any of the constraints.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Date Aliases > Date Aliases window

Creating Date Alias Offset Constraints Procedure

To create a date alias offset constraint for the displayed calendar instance, perform the following steps.

- 1. Query appropriate data.
- 2. Click Date Alias Offset Constraints.
The Date Alias Offset Constraints window appears.
- 3. Enter data in each field of the Date Alias Offset Constraints window as described in the table.
- 4. Save your work.

Table 5–13 Date Alias Offset Constraints Window Description

Field Name	Type	Features	Description
Date Alias	Default display only		Institution-defined name of an event; for example, END-LECT Note: Users cannot define offset values and offset constraints to date alias instances based on holiday calendar.
Offset Date Alias	Default display only		date alias from which the date of another event is calculated by offset
Date Alias Offset Constraints Region			
System Date Offset Constraint Type	Required	List of values	System date offset constraint type that defines the days used in the constraint; for example, Monday, Friday Note: Users are warned of conflicting constraints. If the system is unable to resolve the conflict, it ignores the constraint and calculates alias value from the offset date alias instance.
Condition	Required		Conditional operator that acts on the constraint type; Must or Must Not
Resolution Days	Required		Number of days a calculated date is moved forward or backward to resolve a constraint For example, if the resolution days is set to 2, and the constraint MONDAY, MUST NOT is set, and the date calculated from the offset falls on a Monday, the date is moved forward two days to Wednesday

Table 5–13 Date Alias Offset Constraints Window Description

Field Name	Type	Features	Description
Back		Button	Returns users to Date Alias Instances window

5.5 Date Alias Instance

5.5.1 Setting Up Date Alias Instances IGSCA008

The date alias instances procedure permits the attachment of calendar events, or date alias instances, to particular calendar instances.

The Calendar Date Alias Instances window and the Date Alias Instances window achieve similar results. In the Calendar Date Alias Instances window, a number of events can be attached to one calendar instance. In Date Alias Instances, one event can be attached to several different calendar instances.t

Setting Up Date Alias Instance Offset IGSCA010

The date alias instance, can be specified in terms of its relationship to another base event. The time difference between the two events is called the offset. The base event is termed the offset date alias.

It is possible to ensure that no matter what date is assigned to the offset date alias, the subject date alias instance does not fall on specified days. This is achieved by specifying offset constraints in the Date Alias Instance Offset Constraints window, which is accessed by clicking **Date Alias Instance Offset Constraints** in the Date Alias Instance window.

If an absolute value for a date alias instance is entered along with a Date Alias Instance Offset then the absolute value will override the Date Alias Instance Offset calculated value. The alias value will be the same as the absolute value.

For example, a date alias instance for the end of semester 1 midsemester break, END-BRK1, could be defined as occurring eight days after the date alias instance for the beginning of semester 1 midsemester break, ST-BRK1. The offset date alias is ST-BRK1 and the offset duration of eight days applies to END-BRK1.

The Date Alias Instances region shows the calendar instance for which associated date alias instances are displayed and maintained in the Date Alias Instances region.

Calendar Instance Date Alias Instances IGSCA009

Date alias instances are specific occurrences of a date alias, which is generally defined by having a date attached to a calendar instance.

The calendar date alias instances procedure creates calendar date alias instances.

The Calendar Date Alias Instances window and the Date Alias Instances window achieve similar results. In the Date Alias Instances window, a number of events can be attached to one calendar instance. In Calendar Date Alias Instances, one event can be attached to several different calendar instances.

When the Calendar Date Alias Instances window is entered via the Calendars window, the context calendar instance is the one selected. No inquiry on other calendar instances can be done directly in this window. It is necessary to return to the Calendar Types window and select another calendar instance.

For example, a user can attach the event end of midsemester break, END-BRK, to the calendar instance for semester 1, 2002, SEM-1, 1-SEP-2002 > 15-DEC-2002.

Prerequisites

Calendar Types IGSCA002

Date Aliases IGSCA008

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendars window

Steps

- 1. The Calendars window appears. Query the appropriate record.
- 2. Click **Date Alias Instances**.

The Calendar Date Alias Instances window appears.

- 3. Enter data in each field of the window as described in the table.
- 4. Save your work.

Table 5–14 Calendar Date Alias Instances Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar instance type

Table 5–14 Calendar Date Alias Instances Window Description

Field Name	Type	Features	Description
Effective Dates	Default, display only		Effective start and end dates of calendar instance
Date Alias Instances Region			
Date Alias	Required	List of values	Date alias attached to the calendar instance type
Description	Display only		Date alias description
Absolute Value		Calendar	Actual date value attached to the date alias instance
Alias Value	Display only		Derived date value if offset constraints are attached to the date alias
Date Alias Instance Pair		Button	Opens Date Alias Instance Pair window to pair date aliases and define a period of time inclusive of the paired dates
Date Alias Instance Offset Region			
[Data Coordination Check box]	Optional	Check box	If selected, data in the Date Alias Instance Offset region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Date Alias Instance Offset region is refreshed only when users navigate to the Offset Date Alias field in the Date Alias Instance Offset region. Leave deselected to speed up performance when querying records.
Offset Date Alias	Required	List of values	Date alias used as offset to selected date alias
Offset Alias Value	Display only		Date value given to the offset date alias
Calendar Type	Display only		Calendar type attached to the offset date alias
Effective Dates	Display only		Effective start and end dates of calendar instance
Offset Duration	Optional		Duration of offset in days, weeks, months, and years
Offset Constraints		Button	Opens Date Alias Instance Offset Constraints window to set offset constraints

5.5.2 Setting Up Date Alias Instance Pair

The pairing of date alias instances indicates that the two dates, plus every day between the two dates, are represented by the relationship. When a date alias

instance pair is created using alias instances in calendars of category Holiday, it effectively defines an institution break, which is a system date offset constraint types.

A pair relationship can also be defined at the date alias level in the Date Aliases window.

For example, a date alias instance ST-BREAK, 15-MAY-1999 is created in a calendar of category Holiday, and it is paired with the date alias instance END-BREAK, 30-MAY-1999, also in a holiday calendar; the system recognizes the period 15-MAY-1999 > 30-MAY-1999 inclusive as an institution break.

Prerequisites

Calendar Types IGSCA002

Date Aliases IGSCA008

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Calendars window

Steps

1. The Calendar window appears. Query the appropriate record.
2. Click **Date Alias Instances**.
The Calendar Date Alias Instances window appears.
3. Click **Date Alias Instance Pair**.
The Date Alias Instance Pair window appears.
4. Enter data in each field of the window as described in the table.
5. Save your work.

Table 5–15 Date Alias Instance Pair Window Description

Field Name	Type	Features	Description
Related Date Alias	Required	List of values	Date alias related to the context date; for example, END-BREAK is the related date alias of ST-BREAK representing the period of break in calendar category Holiday

Table 5–15 Date Alias Instance Pair Window Description

Field Name	Type	Features	Description
Related Alias Value	Display only		Alias value related to the context date alias value
Related Calendar Types	Display only		Calendar type attached to the related date alias
Effective Dates	Display only		Effective start and end dates of calendar
Back		Button	Returns users to Calendar Date Alias Instances window

5.5.3 Setting Up Date Alias Instance Offset Constraints

The date alias instance offset constraints procedure creates date alias instances resulting from a date alias instance offset relationship such that the date alias instance cannot fall on specified days

The Date Alias Instance Offset Constraints window is accessed by navigation buttons in the Date Alias Instances windows. In those windows, a date alias instance can be defined in terms of an offset from another date alias instance. The date of the second instance is calculated as the first date plus or minus the offset.

This window is used optionally to ensure that the calculation of the second date results in that date falling on acceptable days. For example, the second date can be constrained to fall outside institution holidays or only on a weekday or only on a Wednesday, or any valid combination of any of the constraints. This feature is particularly valuable when calendars are rolled over. Date alias instances determined by offsets in the new calendars have their dates set according to the constraints rolled over with them.

With constraints defined, when an instance of the first date alias is created, the date of the second is calculated as the first date plus the offset. If this falls either on a day specified by a constraint as unacceptable or doesn't fall on a day specified as the required day, the date is moved forward or backward until the constraint is satisfied. For example, if the calculated date of the second date alias instance falls on a Saturday and the constraint WEEKDAY,MUST, which indicates that the date alias instance must fall between Monday and Friday inclusive, has been specified for the date alias instance, the instance is moved forward to Monday, when the resolution days are set to 1 or 2, in order to satisfy the constraint. Monday's date forms the date alias instance.

In each case, a number of resolution days must be specified. If the calculated date falls on a day that conflicts with the entered constraints, the system moves the

calculated date forward or backward that number of days. For example, if resolution days is set to 2, the constraint Monday, Must Not is set, and the date calculated from the offset falls on a Monday, the date is moved forward two days to Wednesday. If the resolution days is set to -2, the date is moved back two days to Saturday.

Prerequisites

Date Alias IGSCA006

Date Alias Instance IGSCA008

Responsibility

Oracle Student System Super User

Navigation

Setups > Calendars > Date Aliases window

Steps

- 1. In Oracle Student System, navigate to the Date Alias Instance Offset Constraints window as follows:

Setups - Calendars - Date Aliases

The Date Aliases window appears.

- 2. Query the appropriate record.
- 3. Click Date Alias Instances.
- 4. Query the appropriate record.
- 5. Click Date Alias Instance Offset Constraints.

The Date Alias Instance Offset Constraints window appears.

- 6. Enter data in each field of the window as described in the table.
- 7. Save your work.

Table 5–16 Date Alias Instance Offset Constraints Window Description

Field Name	Type	Features	Description
Date Alias	Default display only		institution-defined name of an event; for example, END-LECT Note: Users cannot define offset values and offset constraints to date alias instances based on holiday calendar.

Table 5–16 Date Alias Instance Offset Constraints Window Description

Field Name	Type	Features	Description
[Description]	Default display only		date alias description
Calendar Type	Default display only		calendar type attached to the date alias
Effective Dates	Default display only		effective start and end dates of calendar type
Alias Value	Default display only		alias value attached to the date alias instance
Offset Date Alias	Default display only		date alias from which the date of another event is calculated by offset
Offset Calendar Type	Default display only		calendar type attached to the offset date alias
Effective Dates	Default display only		effective start and end dates of offset calendar type
Alias Value	Default display only		system-defined date value of the date alias instance
Date Alias Instance Offset Constraint Region			
System Date Offset Constraint Type	Required	List of values	system date offset constraint type that defines the days used in the constraint; for example, Monday, Friday Note: Users are warned of conflicting constraints. If the system is unable to resolve the conflict, it ignores the constraint and calculated alias value from the offset date alias instance.
Condition	Required		conditional operator that acts on the constraint type; Must or Must Not
Resolution Days	Required		number of days a calculated date is moved forward or backward to resolve a constraint For example, if the resolution days is set to 2, and the constraint MONDAY, MUST NOT is set, and the date calculated from the offset falls on a Monday, the date is moved forward two days to Wednesday
Back		Button	returns users to Date Alias Instances window

5.6 Admissions Calendars

The Admissions subsystem relies on predefined admission periods and key dates to operate. Admission calendars should be established for an academic year and the calendar rollover process should be used to create admission calendars, which can be modified as required, for future academic periods.

Note: To setup Admission Calendars, see detailed discussion in Setting Up Calendar Types IGSCA002.

Guidelines

In the Calendar Instance Relationships window, link each admission period to both its superior academic and teaching periods. This linking is used in the Direct Admissions Unit window to determine teaching periods and unit offerings relevant to a particular start period. For example, a midyear admission period is relevant to units offered in semester 2 but not to units offered in semester 1 or year-round.

Link each admission period to its subordinate enrollment period. This linking is used by the preenrollment process to determine the enrollment period in which applicants belonging to a particular admission period should be enrolled.

Note: An admission period can have only one subordinate enrollment period.

In the Date Aliases window, create one and only one institution-defined date alias to represent each critical date listed in the Admissions Calendar Configuration window.

Note: Use a date alias category of ADMISSIONS and a calendar category of Admission calendar.

Enter the names of the admission date aliases created in the previous step for the critical dates in the Admissions Calendar Configuration window. List each date critical to the operation of the subsystem.

5.7 Enrollments Calendars

Enrollment calendars provide a framework for the enrollment process. When a student program attempt is preenrolled, a student program attempt enrollment record is created, as viewed in the Program Attempt Administration window.

Enrollment calendars represent the institution's enrollment periods. Each enrollment period must be related to a superior academic period, because preenrollment is always in the context of an academic year. Each admission period must have a subordinate enrollment period, because admission applications are preenrolled into particular enrollment periods.

Each admission period must correspond to an enrollment period. For example, Admission Period 1, Beginning of Year Intake, and Admission Period 2, Mid-Year Intake, must have corresponding enrollment periods.

Various dates must be defined for enrollment and other processes to function. Some of the dates must be attached to enrollment calendars.

5.8 Research Calendars

Research Calendars and Date Aliases

Research calendars, date aliases, and calendar relationships must be established by Calendar and Research specialists.

Research studies often do not fit into standard teaching periods, as semesters. They can span 365 days of a calendar year and require date-to-date enrollment. Hence, teaching calendars and date aliases appropriate for research must be created.

Research students can usually start and stop their research without the penalties that apply to course work. Students, administrative unit statuses and unit discontinuation date aliases enabling withdrawal, without a grade penalty, must be created. A grading schema must also be created for Research.

Accurate load and Effective Full Time Student Unit, or FTE, calculations require the correct configuration of load calendar structures for the Research. There must be relationships between the load and research teaching calendars. Effective Full Time Student Unit, or FTE, calculations require accurate maintenance of a candidate's attendance during research period.

This section includes the following topics:

- Sample Configuration of Research Calendars and Date Aliases
- Configuring Research Calendars and Date Aliases

Sample Configuration of Research Calendars and Date Aliases

The following table describes sample date aliases associated with this calendar configuration. **Note:** Research start date alias instances can be offset from the *Table 5–17 Sample Date Aliases Associated with Calendar Configuration in*

Teaching Calendar Instance	Effective Start Date Alias, RES-STRT	Effective End Date Alias, RES-END
RES-2: 01-JUL-1998 to 31-DEC-1998	19-JUL-1998	05-DEC-1998

Table 5–17 Sample Date Aliases Associated with Calendar Configuration in

Teaching Calendar Instance	Effective Start Date Alias, RES-STRT	Effective End Date Alias, RES-END
SUM: 30-NOV-1998 to 28-FEB-1999	06-DEC-1998	28-FEB-1999
RES-1: 01-JAN-1999 to 30-JUN-1999	01-MAR-1999	18-JUL-1999
RES-2: 01-JUL-1999 to 31-DEC-1999	19-JUL-1999	05-DEC-1999
SUM: 30-NOV-1999 to 29-FEB-2000	06-DEC-1999	29-FEB-2000
RES-1: 01-JAN-2000 to 30-JUN-2000	01-MAR-2000	18-JUL-2000
RES-2: 01-JUL-2000 to 31-DEC-2000	19-JUL-2000	05-DEC-2000

admissions calendar program start date alias instances. For the RES-1, 01-JAN-1999 to 30-JUN-1999, calendar for example, RES-STRT can be offset from the program start date alias for the subordinate admissions calendar instance by zero days.

Configuring Research Calendars and Date Aliases

To configure research calendars and date aliases perform the following steps:

1. Establish the required administrative unit statuses, users must map to the system-defined DISCONTIN unit attempt status, and link each status to a grading schema code.

Note: The research grading schema must already be set up.

The following table describes examples of administrative unit statuses and their descriptions.

Table 5–18 Examples of Administrative Unit Statuses

Administrative Unit Status	Description
WDN	withdrawn from research
WDN PC	withdrawn from research after census date

2. Create the required date aliases using the Date Aliases window and include the following information:

date aliases representing the start and end of a research teaching period. Since these date aliases can only exist in a teaching calendar, their Date Alias and Calendar category types must be TEACHING. After these date aliases are established, they must be linked to the system effective start and

- end dates using the Research Calendar Configuration window.

The following table describes unit discontinuation date aliases matched to administrative unit statuses for RES-1 sample teaching calendar instances.

Table 5–19 Unit Discontinuation Date Aliases for RES-1, 01-JAN-2000 to 30-JUN-2000

Administrative Unit Status	Date Alias	Date Alias Value	Load Incurred?	Grading Schema Grade
WDN	WDN-RES	31-MAR-2000	N	W-withdrawn
WDN PC	WDN-RES-PC	01-APR-2000	Y	W-withdrawn

The following table describes unit discontinuation date aliases matched to administrative unit statuses for RES-2 sample teaching calendar instances.

Table 5–20 Unit Discontinuation Date Aliases for RES-2 01-JUL-2000 to 31-DEC-2000

Administrative Unit Status	Date Alias	Date Alias Value	Load Incurred?	Grading Schema Grade
WDN	WDN-RES	31-AUG-2000	N	W-withdrawn
WDN PC	WDN-RES-PC	01-SEP-2000	Y	W-withdrawn

- 3. Set up research teaching calendar types, for example, SUM, RES-1, and RES-2, and required instances of these calendar types using the Calendar Types window.
- 4. Establish instances of the date aliases within each research teaching calendar instance using the Calendar Date Alias Instances window. Sets of effective start and end date aliases cannot overlap. These date alias instances, for example, RES-STRT and RES-END, have implications for Effective Full Time Student Unit, or FTE, calculation that the user must understand before establishing them. If instances of RES-STRT and RES-END are in a teaching period calendar, the FTE calculation method is determined by whether the associated load calendar has a load research percentage.

Note: The effective start and end date aliases can only exist in a research teaching period with a single census date. The effective start date must come before the end date.

Note: If a calendar instance has effective start and end date alias instances, a single instance of each must exist for the teaching period calendar. Start date and end date date alias instances are dependent in each other.

- 5. Allocate default load apportionment by linking existing load calendars, research teaching calendars, and administrative unit status load using the Load Calendar Structure window. In this window, the Load Incurred indicator must be set as appropriate for the administrative unit statuses used.

The following table describes a sample load apportionment.

Table 5–21 Sample Load Apportionment Using Sample Configuration

Teaching Period	Load Calendar Instance	Default Load Apportionment
LOAD-CAL-1	RES-1	100
LOAD-CAL-2	RES-2	100
LOAD-CAL-3	SUM	100

- 6. Set up the relationships between research teaching calendar instances and the applicable superior academic calendar or subordinate academic calendars, as admissions calendars.

These relationships and values are set up using the Calendar Instance Relationships window. The load research percentage is allocated to the appropriate load calendars in the Subordinate Calendars region. Users must

scroll across the spread table to display this field. The load research percentage must total 100% within an academic period.

The load research percentage must be set for applicable load calendars to ensure correct Effective Full Time Student Unit, FTE, or calculation.

The following table describes a sample load research percentage allocation using a sample configuration of research calendars and date aliases.

Table 5–22 Sample Load Research Percentage Allocation Using Sample Configuration

Teaching Period	Load Calendar	Load Research Percentage
RES-1	LOAD-CAL-1	50%
RES-2	LOAD-CAL-2	50%
SUM	LOAD-CAL-3	null

Research load is usually equally divided between the two census dates, 31 March and 31 August. The load research percentage is divided between the two load calendars that spans between these census dates.

Note: The load research percentage must not be allocated to any other load calendar and a null value instead of zero must be used.

For students who need to be enrolled in research units in teaching periods that contribute to other load calendars, for example, the SUM teaching period that contributes to the LOAD-CAL-3 load calendar; the Effective Full Time Student Units, or FTE, are calculated using the standard method, in which the number of override or enrolled credit points is divided by the standard annual load value.

For example, using the sample load research percentage allocation in The previous table, a student enrolled in a research unit in the SUM teaching period generates an FTE calculated using the standard method for LOAD-CAL-3. If enrollment continues into RES-1, the student generates an FTE calculated, using the method for calculating FTE for research for LOAD-CAL-1. If the research commencement date is prior to 1 March, the program start date alias instance for the admissions calendar instance would be subordinate to RES-1.

Effective Start Date and Effective End Date

The effective start date and the effective end date entered in the Research Calendar Configuration window is used in the Research. These dates are used to ensure dates and Equivalent Full Time Student Units are calculated correctly.

5.9 Assessment Calendars

Assessment calendars are set up for assessment processes other than examinations. Like examination calendars, assessment calendars are groupings of teaching periods. They are not referenced in windows but are used mainly as job and report parameters. An assessment calendar defines the set of teaching periods whose associated units are concurrently assessed during an assessment period.

For example, an assessment period ASS-SEM1 can be associated with the teaching periods SEM-1, S1-E1, and S2-E1. Units associated with these teaching periods are assessed concurrently during this assessment period. When running the Result Sheets, Invalid Grades, and Non-Enrolled Outcomes reports, ASS-SEM1/1998 can be specified as a parameter rather than running the report for each individual teaching period.

The procedure for setting up assessment calendars includes the following steps:

1. Using the Calendar Types window, create calendar types such as ASS-SEM1 and ASS-SEM2, each with a calendar category of ASSESSMENT, to represent each assessment period in an academic year.
2. In the same window, create instances of the new calendar type to define each required assessment period. For example, a first semester assessment period can be represented by the calendar instance ASS-SEM1 > 01-MAR-1999 > 30-JUN-1999.
3. Click the **Calendar Relationships** button to access the Calendar Instance Relationships window. Create relationships between each assessment period and the related teaching periods.

Note: Teaching periods are subordinate to assessment periods. This relationship is created between an assessment period and those teaching periods with units that are assessed in the assessment period.

4. Create relationships between assessment periods and superior academic periods.
5. Using the Date Aliases window, create a date alias representing a date after which changes should not be made to unit assessment items.

6. Enter the date alias as the assessment item variation cutoff date alias in the Configure Assessment Calendar window.

5.10 Examination Calendars

The procedure for setting up examination calendars includes the following steps:

1. Using the Calendar Types window, create a calendar type, such as EXAMS, with a calendar category of EXAM, which is the type of calendar representing examination periods.
2. In the same window, create instances of the new calendar type to define each required examination period. For example, a first semester examination period can be represented by the calendar instance EXAMS > 15-DEC-1999 > 21-DEC-1999.
3. Click the **Calendar Relationships** button to open the Calendar Instance Relationships window. Create relationships between each examination period and the related teaching periods.

Note: Teaching periods are subordinate to examination periods. This relationship is created between an examination period and those teaching periods with units examined in the examination period.

4. Using the Date Aliases window, create date aliases representing days when examinations are held. A separate date alias should be created for each day in an examination period, such as EXAM-DAY1 and EXAM-DAY2.
5. Click the **Date Alias Instance** button in the Date Aliases window to access the Date Alias Instances window. Create instances of the date aliases. Each instance defines a particular date within an examination period when examinations can occur, such as EXAM-DAY1 > 15-DEC-1999 and EXAM-DAY2 > 16-DEC-1998.
6. Define the examination sessions available on each day of an examination period.

After the complete set of examination calendars for a particular academic year are created, the calendar rollover process can create calendars for subsequent years.

Systemwide Services: Organizational Structure

6.1 Organizational Structure

The Organizational Structure functionality maintains all details required to fully define institutions, organizational units, and locations and record and maintain organizational unit details and relationships used by various subsystems.

Table 6-1 describes examples of organizational structure details used by and enhanced in other subsystems.

Table 6-1 Examples of Organizational Structure Details

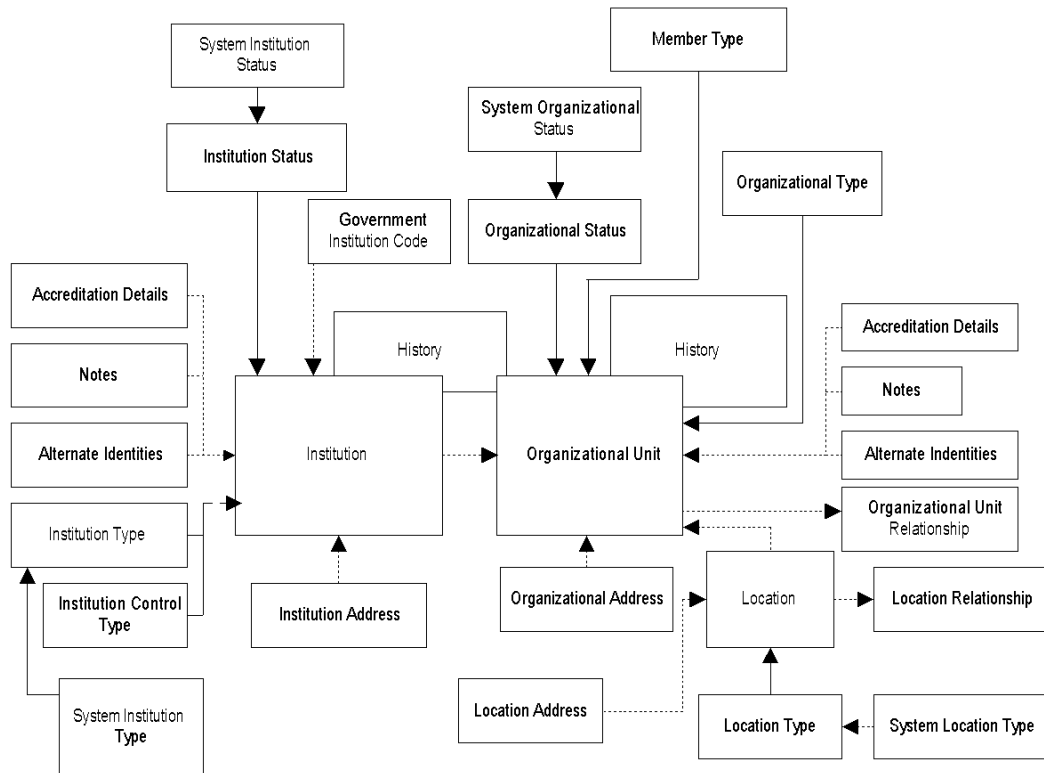
Subsystem	Organizational Structure Details
Advanced Standing	institution details for entering advanced standing applications
Program Structure and Planning	organizational unit details for entering program and unit ownership and responsibility
N/A	organizational unit details for entering program award ownership
N/A	location details for entering program and unit offering option and pattern details

Most information entered in the Organizational Structure windows is reference data. The ability to add, modify, and delete data in these windows should be restricted to system-wide specialists and system administrators responsible for maintaining institution details and organizational structures. Most other users use organizational structure details in other subsystems or through special inquiry or reporting interfaces, and should have read-only access.

The Organizational Structure windows maintain all details required to fully define institutions, organizational units, and locations.

Figure 6–1 shows the data dependencies in the Organizational Structure windows.

Figure 6–1 Organizational Structure Relationships



The direction of an arrow indicates the relationship between two data elements. A solid line indicates that the relationship is required. A broken line indicates that the relationship is optional.

For example, an institution address can be assigned multiple usages. To define an institution, an institution address does not have to be assigned to the institution. However, before assigning an address to an institution, the institution must exist.

The following dependencies are shown in Figure 6–1

- Organizational Unit

- Institution
- Location

Organizational Unit

Organizational unit is dependent on the following data:

- organizational status
- member type
- organizational type
- institution

Organizational unit have the following optional dependencies:

- accreditation details
- notes
- alternate identities
- organizational address
- location

Organizational status is dependent on system organizational status. Organizational unit relationship is an optional dependency for organizational unit.

Institution

Institution is dependent on the following data:

- institution status
- institution type
- institution control type

The following data is optional for institution:

- accreditation details
- notes
- alternate identities
- government institution code
- institution address

Institution address is not dependent on address usage, and location address and organization address are dependent on address usage.

Location

Location is dependent on location type. System location type is an required dependency for location type. Location relationship is an optional dependency for location.

6.2 Organizational Structure Configuration

6.2.1 Organizational Structure Lookups

You must define organizational structure lookup code for Accreditation Status, OR_ACCR_STATUS.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Lookups

Steps

1. In the Type field, enter OR_ACCR_STATUS.
2. Enter user-defined codes.

6.2.2 Organization Structure Setup Navigation

The Organizational Structure Setup window uses file technology. The Building icon represents institution and organizational unit setup. The Globe icon represents location Setup.

When you select Institution, Organizational Unit, Location, Building, Room, or Venue, a corresponding display only tab page will appear on the right side of the window. A Details button opens the corresponding window for you to update the detail information.

At the top level is node like Institution Name with a + arrow if the institution can be expanded to show related organizational units.

When you click on the node, the node's detail information is displayed in the tab on the right side of the form.

You can edit the node details by clicking on the Details button in the node's tab. In order to create a new node user must click on the insert icon or right mouse click.

You can save personal or public shortcut nodes in the Organizational Structure Setup window. To save public shortcuts, you must set the FND: APPTREE profile option to Y at both the site level and the user level.

Prerequisites

The Building icon must be selected to access institution and organization windows and tabs.

The Globe icon must be selected to access location windows and tabs.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

The following table describes how to navigate to each tab of the Organizational Structure Setup window.

Table 6–2 Organizational Structure Setup Tab Navigation

Tab	Navigation
Institution	Expand Institutions. Select your institution. The Institution tab appears.
Organization	Expand Institutions. Expand the selected Institution. Select your institution. Select the organization unit related to the institution. The Organization tab appears.

Table 6–2 Organizational Structure Setup Tab Navigation

Tab	Navigation
Location	Expand Locations after selecting the Globe icon. Select your location. The Location tab appears.
Venue	Expand Locations after selecting the Globe icon. Expand your location. Select Venues. The Venues tab appears.
Building	Expand Locations after selecting the Globe icon. Expand your location. Expand Buildings / Rooms. Select your building. The Building tab appears.
Room	Expand Locations after selecting the Globe icon. Expand your location. Expand Buildings / Rooms. Expand your building. Select your room. The Room tab appears.

The following table describes how to navigate to organizational structure windows from the Organizational Structure Setup window.

Table 6–3 Organizational Structure Setup Window Navigation

Window	Navigation
Institutions window	Expand Institutions. Select your institution. The Institution tab appears. Click Institution Details . The Institutions window appears.

Table 6–3 Organizational Structure Setup Window Navigation

Window	Navigation
Progression Rule Applications window	<p>Expand Institutions.</p> <p>Select your institution.</p> <p>Expand your selected institutions.</p> <p>Select your organization unit.</p> <p>The Organization tab appears.</p> <p>Click Progression Rules.</p>
Organizational Units window	<p>Expand Institutions.</p> <p>Select your institution.</p> <p>Click Administrative.</p> <p>The Organization tab appears.</p> <p>Click Organization Details.</p>
Locations window	<p>Expand Locations after selecting the Globe icon.</p> <p>Select your location.</p> <p>The Location tab appears.</p> <p>Click Location Details.</p>
Venue Session Availability	<p>Expand Locations after selecting the Globe icon.</p> <p>Select your exam / graduation location.</p> <p>Expand your location.</p> <p>Select Venues.</p> <p>Expand venue.</p> <p>Select your venue.</p> <p>The Venues tab appears.</p> <p>Click Session Availability.</p>

Table 6–3 Organizational Structure Setup Window Navigation

Window	Navigation
Venue Details	Expand Locations after selecting the Globe icon. Select your exam / graduation location. Expand your location. Select Venues. Expand venue. Select your venue. The Venues tab appears. Click Venue Details .
Buildings	Expand Locations after selecting the Globe icon. Expand your location. Expand Buildings / Rooms. Select your building. The Building tab appears. Click Building Details .
Rooms	Expand Locations after selecting the Globe icon. Expand your location. Expand Buildings / Rooms. Expand your building. Select your room. The Room tab appears. Click Room Details .

Navigating the Tree

The following table describes how to use the tree.

Table 6–4 Tree Navigation

Menu Item	Main Truck Nodes	Short Cut Notes	Institution / Organization Unit Alphabet Node	Institution / Organization Unit Node
New	N/A	N/A	N/A	Opens up blank Institution, Organization Unit, Location, Building, Room, and Venue Window
New Folder	For (Personal and Public Shortcuts), it creates a new sub folder.	For (Personal and Public Shortcuts), it creates a new sub folder.	N/A	N/A
Open	Expand the Node	Opens the node, or execute the query	Expand the Node	N/A
Find	For (Institution, Organization Unit, Location, Building, Room, and Venue By Name) Node, it invoke the Find window	N/A	Opens the Find window	Opens the Find window
Cut	N/A	To clipboard	N/A	N/A
Copy	N/A	To clipboard	N/A	N/A
Paste	N/A	From clipboard	N/A	N/A
Refresh	N/A	N/A	N/A	N/A
-> Current	N/A	N/A	Refresh the nodes under the alphabet	Refresh the particular node (SUMMARY block)

Table 6–4 Tree Navigation

Menu Item	Main Truck Nodes	Short Cut Notes	Institution / Organization Unit Alphabet Node	Institution / Organization Unit Node
-> All	Enable for (Institution, Organization Unit, Location, Building, Room, and Venue By Name) to manually refresh the tree nodes under it.	N/A	Refresh all tree nodes under Institution, Organization Unit, Location, Building, Room, and Venue By Name	Refresh all tree nodes under Institution, Organization Unit, Location, Building, Room, and Venue By Name
Propertie S...	Display – Folder Type, Name, Owner	Display – Folder Type, Name [editable], Owner	N/A	N/A
Delete	N/A	N/A	N/A	N/A
Help	N/A	N/A	N/A	N/A

Steps

The Organizational Structure Setup window has several tabs with display only information.

Institution Tab

The following are located on the Institution tab:

- Preferred Alternate ID Type (appears only if the preferred alternate ID type is identified for institution)
- Institution Code
- Name
- Phone
- Local Institution check box

Note: Select this check box if the institution displayed is your institution.

- Market Code
- Priority
- Status
- Government Institution Code
- Institution Type
- Institution Control

To change any information on this tab, click **Institution Details** or add lookup values using the Lookups window.

Organization Tab

The following are located on the Organization tab:

- Preferred Alternate ID Type (appears only if the preferred alternate ID type is identified for organizational unit)
- Organizational Unit Code
- Description
- Start Date
- End Date
- Org Status
- Org Type
- Member Type
- Institution Code

To change any information on this tab, click **Organization Details** or add lookup values using the Lookups window. To view the progression rules, click **Progression Rules**.

Location Tab

The following are located on the Location tab:

- Location Code
- Closed check box

Note: Select this check box to disable future use of a location code.

- Description
- Location Type
- Coordinator
- Mail Delivery Working Days

To change any information on this tab, click **Location Details** or add lookup values using the Lookups window.

Venue Tab

The following are located on the Venue tab:

- Venue Code
- Closed check box

Note: Select this check box to disable future use of a venue code.

- Description
- Coordinator
- Supervisor Limit
- Priority Code
- Number of Seats
- Seating Information
- Comments

To change any information on this tab, click **Venue Details** or add lookup values using the Lookups window.

To access the Venue Session Availability window, click **Session Availability**.

Building Tab

The following are located on the Building tab:

- Location Code
- Closed check box

Note: Select this check box to disable future use of a location code.

- Building Code

- **Description**

To change any information on this tab, click **Building Details** or add lookup values using the Lookups window.

Room Tab

The following are located on the Room tab:

- **Building ID**
- **Closed check box**

Note: Select this check box to disable future use of a building ID.

- **Room Code**
- **Description**
- **Primary Use**
- **Capacity**

To change any information on this tab, click **Room Details** or add lookup values using the Lookups window.

6.2.3 Organizational Structure Data Setup - Note Type Tab IGSOR032

Organizational structure note types are user-defined codes representing a type of note that can be recorded against an institution, an organizational unit, or a location. For example, Admin is a user-defined code that could represent an administrative note, and Press could represent a press release note.

Organizational structure note types must be set up before using notes in locations, institutions, or organizational units.

You specify the organizational structure entities to which note types apply. in

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window > Note Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–5 Note Types Tab

Field Name	Type	Features	Description
Note Type Tab			
Note Type	Required		Note type Note: The code entered in the Note Type field must consist of upper case letters that represent a type of note
Description	Required		Note type description Note: If a particular note type is currently used by an organizational structure entity, it cannot be deleted.
Institution	Optional	Check box	If selected, indicates the note type recorded against an institution
Organizational Unit	Optional	Check box	If selected, indicates the note type recorded against an organizational unit
Location	Optional	Check box	If selected, indicates the note type recorded against a location

6.2.4 Organizational Structure Data Setup - Alternate ID Tab IGSOR032

Organizational structure alternate ID types are user-defined codes representing external agencies for which alternate ID codes are maintained. For example, the external agency identifies an organization or institution for Pell Grant.

Users are required to set up organizational structure alternate ID types and specify the organizational structure entities to which alternate ID types apply.

Note: You cannot have multiple alternate IDs of the same alternate identifier type.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Data Setup > Alternate ID Types tab

Steps

1. Enter the Alternate ID type codes and descriptions as shown in the table.

UK Note: For UK functionality, enter HESA_INST as the HESA institution alternate identifier type.

2. Save or save and continue as follows:

File > Save or Save and Proceed

3. Close the window

Table 6–6 Alternate ID Type Tab

Field Name	Type	Features	Description
Alternate ID Type Tab			
ID Type	Required		Alternate ID type Note: The code entered in the ID Type field must consist of upper case letters that represent a type of note
Description	Required		Alternate ID type description
System ID Type	Required	List of values	Valid values include Other, SEVIS program code, and SEVIS school code Select SEVIS program code for your exchange visitors code. Select SEVIS school code for your non-immigrant student code. Note: You must enter your SEVIS program code and your SEVIS school code for SEVIS functionality to properly function.
Institution	Optional	Check box	If selected, indicates an institutional alternate ID
Preferred Institution	Optional	Check box	If selected, indicates that the institution is preferred. Only one ID type can be identified as a preferred alternate ID type for an institution.

Table 6–6 Alternate ID Type Tab

Field Name	Type	Features	Description
Organizational Unit	Optional	Check box	If selected, indicates an organizational unit ID
Preferred Organizational Unit	Optional	Check box	If selected, indicates that the organizational unit is preferred Only on ID type can be identified as a preferred alternate ID type for an organizational unit
Closed	Optional	Check box	If selected, prevents further use of the ID. Note: Closed alternate ID types cannot be assigned to entities in the organizational structure.

Note: For information about the Repeat Processing tab of the Organization Structure Data Setup window, see Chapter 11, "Enrollments".

6.3 Institutions

6.3.1 Institutions Lookups

You must define institutions lookup codes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Lookups

Steps

In the Type field, enter a lookup from the following list and enter user-defined codes for each lookup:

- OR_INST_CTL_TYPE Institution Control Type
- OR_INST_GOV_CD Government Institution Code

- OR_INST_PRIORITY_CD Institution Priority Code
- OR_INST_STAT_TYPE Institution Statistic Type

Note: UK users should set up the HESA institution codes as government institution codes.

6.3.2 Organizational Structure Data Setup - Institution Types Tab IGSOR032

Institution types are user-defined values that describe institutions. Institutions are typically colleges or universities that provide higher education instruction. Examples of institution types include Associates, Baccalaureate, Doctoral/Research, Corporation, and Foundation.

To create institutions, users are required to set up institution types and institution control types.

UK Note: UK users should set up HESA institution codes as government institution codes.

Prerequisites

An organizational unit belongs to an institution. An institution must be defined to to set up organizational units.

Organizational structure information must be defined to attach institution data to organizational structure data.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window > Institution Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–7 Institution Type Tab

Field Name	Type	Features	Description
Institution Type Tab			

Table 6–7 Institution Type Tab

Field Name	Type	Features	Description
Institution Type	Required		Institution type Note: The institution type is composed of upper case letters only.
Description	Required		Institution type description
System Institution Type	Required	List of values	System-defined institution type Note: Institution types are mapped to system institution type
Closed	Optional	Check box	If selected, prevents further use of the institution type Note: Closed institution types cannot be assigned to institutions. Defaults to value N.

6.3.3 Organizational Structure Data Setup - Institution Status Tab IGSOR032

An institution status defines an institution’s current level of activity. Each institution status must be assigned to a system institution status that is recognized by the system for other functionality. For example, an institution’s status can be Active or Inactive. Other subsystems can only use Active institutions.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window > Institution Status tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–8 Institution Status Tab

Field Name	Type	Features	Description
Institution Status Tab			

Table 6–8 Institution Status Tab

Field Name	Type	Features	Description
Institution Status	Required		Institution status Note: When a new institution status is entered, the system institution status defaults to Active.
Description	Required		Institution status description
System Institution Status	Required	List of values	System institution status; Active or Inactive
Closed	Optional	Check box	If selected, prevents further use of the institution status Note: If an institution status has been used in the definition of an institution, it cannot be deleted.

6.3.4 Organizational Structure Data Setup - Institution Crosswalk Tab IGSOR032

The Institution Crosswalk window enables users to query the crosswalk data. For example, to find a particular record, users might need to query by institution name, institution code, institution alternate ID, or by a combination of these data elements.

Since the impact of changing an identifier in the Crosswalk is complex, the data displayed in this window cannot be edited.

The search results can be sorted first by the institution name and then by alternate ID type.

Users can compare the automatically generated Import Process Institution Crosswalk Error Report and the Institution Crosswalk window to identify errors for correction. Errors can be corrected in the interface tables directly. Users can use any tools such as SQL * PLUS to query, insert, update, or delete records from the interface tables. The Import Institution Crosswalk concurrent process imports crosswalk data from the Student System interface table.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window > Institution Crosswalk tab

Steps

View the data in the window.

Table 6–9 *Institution Crosswalk Tab*

Field Name	Type	Features	Description
Institution Crosswalk Tab			
Name	Display only		Name of institution
Alternate ID Type	Display only		Alternate ID type specified for institution
Alternate ID Value	Display only		Alternate ID value specified for institution
Institution Code	Display only		Institution code specified for institution

6.3.5 Setting Up Institutions IGSOR029

An Institution decides which institutions to record and the institution code to assign to each institution. An institution must be assigned an institution status showing its current level of activity.

Modifying an institution record generates a history record. Once an institution code is created, it cannot be altered. Only the description can be modified. Institutions cannot be deleted. The status can be set to Inactive.

UK Note: External bodies, including exam boards and other institutions, providing teaching for HESA reporting purposes (schools, colleges, universities, and other educational establishments) that are reported to HESA as the previous institution attended must be set up as institutions in Oracle Student System.

The government institution code must be set for other institutions providing teaching and an alternative ID type of HESA_INST is required for previous institution attended. The HESA_INST codes must be valid HESA previous institution codes and, if defined as the codes provided by UCAS in the *J file and transactions, the previous institution attended can be updated from the UCAS data.

Note: An awarding body should have a system institution type of Post, Secondary, or Other.

Note: Include the awarding body institution type.

Other institutions providing teaching must also be defined as organizational units and be linked to the institution.

Prerequisites

Institution Statuses IGSOR032

Government Institution Codes (optional) IGSOR032

Organizational Structure Alternate ID Types (optional) IGSOR032

Institution Types IGSOR032

Institution Control Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Note: For a new institution, you do not need to select an existing institution. You must right click your mouse for a menu and select Add Institution.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–10 *Institutions Window Description*

Field Name	Type	Features	Description
Institution Code	Required		Institution codes can be auto generated by setting the HZ: Generate Party Number profile option to Yes or manually entered by setting the profile option to No
Name	required		institution name
Telephone Country Code	optional		telephone country code
Telephone Area Code	optional		telephone area code

Table 6–10 Institutions Window Description

Field Name	Type	Features	Description
Telephone Number	optional		institution telephone number
Market Code	optional		market code
Local Institution	optional	check box	if selected, indicates whether this record applies to the institution that owns the student database Note: It is used for reporting purposes only. Only one institution can be a local institution.
Priority	optional	list of values	institution priority code
Institution Status	required	list of values	institution status Note: Changing an institution status also changes its system status from Active to Inactive, all active dependent organizational units also change.
Government Institution Code	optional	list of values	government institution code and description
Institution Type	required	list of values	institution type
Institution Control	required	list of values	institution control type
Preferred Alternate ID Type	Required		Value of the preferred alternate ID type; enterable, not updateable Note: You can change your selection of preferred alternate ID in the Identifier tab on this window.
[Descriptive Flexfield]	optional		user-customization field

6.3.5.1 Setting Up Addresses

The addresses procedure enables users to enter addresses, usage and contact details for persons, institutions, organizational units, locations, or venues.

Addresses can be stored for a person, institution, organizational unit, location, or venue. Valid addresses for these entities are indicated by the start date. If an end date is entered, the address is valid for the time period between the start and end dates.

An address can be assigned multiple usages, such as Bill-To, Postal, or Home.

Contact information can also be assigned, such as telephone numbers and E-mail addresses.

Prerequisites

Institution Statuses IGSOR032

Government Institution Codes (optional) IGSOR032

Organizational Structure Alternate ID Types (optional) IGSOR032

Institution Types IGSOR032

Institution Control Types IGSOR032

Setup in Oracle Receivables must be complete.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Address tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–11 Address Tab

Field Name	Type	Features	Description
Address Tab			
Start Date	required	calendar	address start date
End Date	required	calendar	address end date
Primary	optional	check box	if selected, indicates an institution's primary address
Country	required	list of values	country name
Address	required		complete residence or office address

Table 6–11 Address Tab

Field Name	Type	Features	Description
City	Required depending on country and validations set up in Oracle Receivables	list of values	city name
State	Required depending on country and validations set up in Oracle Receivables	list of values	state name
County	Required depending on country and validations set up in Oracle Receivables	list of values	county name
Province	Optional		province name
Zip	Required depending on country and validations set up in Oracle Receivables	list of values	area postal code
Delivery Point Code	Optional		mail delivery point code
Usages	Required	List of values	Address usages Note: Usages can be entered on the Address tab.
Contact	Optional	Button	Opens the Address Contacts window for you to enter phone number and email information for an address

Guidelines

You must enter phone / email setup for each address.

6.3.5.2 Setting Up Institution Contacts

Contact information such as contact person, telephone, address, reference, email address can be created by users in the Institution Contacts window.

Users can create, modify, and delete contact information of an institution.

Note: Users cannot delete contact details information, but they can update or delete contact telephone details. Users cannot enter multiple telephone numbers for a single contact name. Users cannot enter a person more than once.

Prerequisites

Institution Statuses IGSOR032

Government Institution Codes (optional) IGSOR032

Organizational Structure Alternate ID Types (optional) IGSOR032

Institution Types IGSOR032

Institution Control Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Contacts tab.

or

Select the Address tab.

Click **Contacts**.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–12 *Contacts Window*

Field Name	Type	Features	Description
Contacts Window			
Person Number	required	Person Find Icon	Person number
Name	Display only		Full name displayed from entering person number
Email Address	optional		institution contact's email address
Active	optional	check box	if selected, indicated an active institution; selected by default
[Descriptive Flexfield]	optional		user-customization field
Phones Region			
Type	Required		Type of phone (voicemail, fax)
Country Code			institution's contact phone country code
Area Code			institution's contact phone area code
Phone Number	Required		institution's contact telephone number
Extension			extension number
Primary	optional	check box	if selected, indicates primary telephone number
Active	optional	check box	if selected, indicates active telephone number; selected by default
[Descriptive Flexfield]	optional		user-customization field

6.3.5.3 Setting Up Alternate IDs

Oracle Student System enables users to enter institution or organizational unit identifiers assigned by external agencies. These identifiers are alternate identifiers because they are in addition to the identifier assigned by the user to the same institution or organizational unit.

When importing the data sources and data source value as alternate identifiers types and alternate identifier values, users must specify a start date and end date.

Alternate identifiers and values are maintained in a Crosswalk table also for identifying duplicate institutions during import process.

Note: For Financial Aid, you must set up an alternate ID of Social Security number.

For example, an institution can set up its preferred alternate id as Driver's License. For Financial Aid purposes, you must create an alternate id of type SSN and associate the person's Social Security number to it. In this case student is going to have two IDs: one DL and other one SSN.

Prerequisites

Institutions IGSOR029

Organizational Structure Alternate ID Types IGSOR032

Organizational Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Identifier tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–13 Identifier Tab

Field Name	Type	Features	Description
Identifier Tab			
ID Type	required	list of values	ID type; for example, Pell ID, Degree Audit, College Scholarship Service Identifier (CSSID)
Alternate ID	required		alternate ID; an identifier by which the institution or organizational unit is also known

Table 6–13 Identifier Tab

Field Name	Type	Features	Description
Start Date	required	calendar	date on which the alternate ID is effective
End Date	optional	calendar	date on which the alternate ID is inactive

6.3.5.4 Setting Up Accreditation Details

Accreditation details are descriptions of accreditation status.

The accreditation agency cannot be the same the institution to which the organization belongs.

Accreditation details appear alphabetically in ascending order by accreditation agency code.

Prerequisites

Institutions IGSOR029

Organizational Structure Alternate ID Types IGSOR032

Organizational Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Accreditation tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–14 Accreditation Tab

Field Name	Type	Features	Description
Accreditation Tab			
Accreditation Agency	required	list of values	accreditation agency Note: An accreditation agency must be created as an institution within Oracle Student System. Once created, cannot be modified.
Accreditation Status	required	list of values	accreditation status; once created cannot be modified Note: A combination of status and accreditation agency must be unique over a date range.
Start Date	required	calendar	accreditation status start date; once set cannot be modified Note: Users cannot set the Start Date to be less than the organization start date.
End Date	optional	calendar	accreditation status end date

6.3.5.5 Setting Up Secondary Schools

The Secondary School window enables users to enter all the secondary school information pertaining to an institution.

Users can create and modify information of an secondary school.

Prerequisites

Institutions IGSOR029

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Secondary Schools tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–15 Secondary School Tab

Field Name	Type	Features	Description
Secondary School Tab			
Number of Honors Class Offered	optional		number of honors class offered
Number of Advanced Studies Classes Offered	optional		number of advanced studies classes offered
Class Size	optional		class size
Secondary School Location	optional	list of values	secondary school location and description
Planning to Pursue Higher Education	optional		plan of pursuing higher education

6.3.5.6 Reviewing Institution History

The history tab displays the history of changes to institution details.

Prerequisites

Institutions IGSOR029

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the History tab.

Steps

View data in the window.

Table 6–16 History Tab

Field Name	Type	Features	Description
History Tab			
History Start Date	Default, display only		Date of history
Name	Default, display only		Name of institution
Details Region			
Telephone	Default, display only		Telephone information
End Date	Default, display only		End date of institution
History By	Default, display only		Name of person who changed institution information
Local	Default, display only		Local institution information
Market Code	Default, display only		Market code for institution
Priority Code	Default, display only		Priority code for institution
Government Institution Code	Default, display only		Government institution code for institution

6.3.5.7 Setting Up Institution Statistics

The Institution Statistics window enables users to enter statistics of an institution for a specified year. It also enables users to create, update, and delete institution statistic details. Users can enter multiple statistic details for a institution.

Prerequisites

Institution Statistic Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Statistics tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–17 Statistics Tab

Field Name	Type	Features	Description
Statistics Tab			
Statistic Type	required	list of values	statistic type
Year	required		year
Value	optional		value

6.3.5.8 Setting Up Institution Notes

Organization structure notes are comments or descriptive text that users enter about institutions, organizational units, or locations.

Prerequisites

Institutions IGSOR029

Organizational Structure Note Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup window

Expand Institutions.

Select your institution.

The Institution tab appears.

Click **Institution Details**.

The Institutions window appears.

Select the Notes tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–18 Notes Tab

Field Name	Type	Features	Description
Notes Tab			
Note Type Description	required	list of values	organization note type Note: The note type descriptions originate from the organizational structure note types set up procedure.
Start Date	required		date on which the note is effective
End Date	optional		date on which the note is inactive
Notes		button	opens Notes Text window

6.4 Locations

6.4.1 Location Type Organizational Structure - Location Type Tab IGSOR032

A location type is a classification assigned to each site in the system to classify its use and to enable grouping of locations. Examples of location types are Study Center and Campus.

Location types are used in other subsystems, such as Program Structure and Planning. location is an attribute of the program offering option.

A location type can be assigned a system location type to ensure specific functionality.

Prerequisites

Organizational unit information must be defined to enable users to attach location data to organizational unit data. An organizational unit can be assigned to multiple locations.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Location Type tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–19 Location Type Tab

Field Name	Type	Features	Description
Location Type Tab			
Location Type	Required	List of values	Type of location
Description	Required		Description of the location type
System Location Type	Required	List of values	Seeded system type for which you must map your user-defined type
Closed	Optional	Check box	If selected, indicates no future use of a location type

6.4.2 Setting Up Location Details IGSOR031

A location is a site where an organization conducts business. An example of a location is a particular campus or examination location.

The locations procedure creates locations and their associated contact details, and assigns rooms and buildings to locations.

An organization may conduct business at a number of locations. A location can be assigned to unit section occurrences.

A location must be assigned a location type. A location type is institution-defined using the Location Type window. The location type determines the subsequent use of the location in other subsystems. For example, locations of the Graduation Center system type are accessed by the Graduations windows.

Prerequisites

Location Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Expand Locations after selecting the Globe icon.

Select your location.

The Location tab appears.

Click **Location Details**.

The Location Details window appears.

Note: To create a new location, you must right click your mouse and select Add Location from the menu.

Steps

Enter data in each field of the window as described the table. Save your work.

Table 6–20 Location Details Window Description

Field Name	Type	Features	Description
Location Code	required		location code
Description	required		location code description
Location Type	required	list of values	location type Note: A location must be assigned a location type that is mapped to a System Location Type to have specific system functionality. The available system location types are Exam Center, Campus, and Graduation Center.
Closed	optional	check box	if selected, prevents further use of the location code Note: If a location has been used elsewhere in the system, it cannot be deleted
Location Type Description	Display only		location type description
Coordinator	optional		coordinator name against a location of the system Exam Center Note: Person must be Staff person type.

Table 6–20 Location Details Window Description

Field Name	Type	Features	Description
Mail Delivery (Working Days)	optional		mail delivery
[Descriptive Flexfield]	optional		user-customization field

6.4.2.1 Setting Up Addresses

The addresses procedure enables users to enter addresses, usage and contact details for persons, institutions, organizational units, locations, or venues.

Addresses can be stored for a person, institution, organizational unit, location, or venue. Valid addresses for these entities are indicated by the start date. If an end date is entered, the address is valid for the time period between the start and end dates.

An address can be assigned multiple usages, such as Bill-To, Postal, or Home.

Contact information can also be assigned, such as telephone numbers and Email addresses.

Prerequisites

- Locations must exist.
- Oracle Receivables must be set up.

Responsibility

Oracle Student System Super User

Navigation

- Expand Locations after selecting the Globe icon.
- Select your location.
- The Location tab appears.
- Click **Location Details**.
- The Location Details window appears.
- Select the Address tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–21 Address Tab

Field Name	Type	Features	Description
Address Tab			
Effective Start Date	required	calendar	address start date
Effective End Date	required	calendar	address end date
Primary	optional	check box	if selected, indicates a person's primary address
Country	required	list of values	country name
Address	required		complete residence or office address
City	Required depending on country and validations set up in Oracle Receivables	list of values	city name
State	Required depending on country and validations set up in Oracle Receivables	list of values	state name
Province	Optional		province name
County	Required depending on country and validations set up in Oracle Receivables	list of values	county name

Table 6–21 Address Tab

Field Name	Type	Features	Description
Postal Code	Required depending on country and validations set up in Oracle Receivables	list of values	area postal code
Delivery Point Code	Optional		mail delivery point code
Usages Region			
Active		Check box	If selected, indicates that description is active
Description	Required	List of values	Description of address usages
Contacts		Button	Opens the Address Contacts window

6.4.2.2 Setting Up Phone and Email Information

Oracle Student System records a location's telephone number, telephone type, extension number, email address, residence area code, and country code.

The phone and email procedure enables users to enter a location's telephone number, residence information, and email address.

Prerequisites

Locations must exist.

Addresses must exist.

Responsibility

Oracle Student System Super User

Navigation

Expand Locations after selecting the Globe icon.

Select your location.

The Location tab appears.

Click **Location Details**.

The Location Details window appears.

Select the Address tab.

Click **Contacts**.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–22 Contacts - Phone and Email Tab Information

Field Name	Type	Features	Description
Contacts - Phone and Email Tab			
Telephones Region			
Type	required	list of values	telephone usage type
Country Code	optional		user-defined country code
Area Code	required		user-defined area code
Telephone Number	Required		Location's telephone number
Extension	optional		Location's telephone extension number
Primary	optional	check box	if selected, indicates a location's primary telephone number
Closed	optional	check box	if selected, prevents further use of the telephone number
[Descriptive Flexfield]	optional		user-customization field
Email Region			
Email format	required	list of values	user extensible email format
Email Address	required		Location's email address
Primary	optional	check box	if selected, indicates a location's primary email address
Closed	optional	check box	if selected, prevents further use of email address
[Descriptive Flexfield]	optional		user-customization field

Table 6–22 Contacts - Phone and Email Tab Information

Field Name	Type	Features	Description
Done		button	returns users to the Person Details window

6.4.2.3 Setting Up Location Notes

Organization structure notes are comments or descriptive text that users enter about institutions, organizational units, or locations.

Prerequisites

Locations IGSOR032

Organizational Structure Note Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Expand Locations after selecting the Globe icon.

Select your location.

The Location tab appears.

Click **Location Details**.

The Location Details window appears.

Select the Notes tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–23 Notes Tab

Field Name	Type	Features	Description
Notes Tab			
Note Type Description	required	list of values	organization note type Note: The note type descriptions originate from the organizational structure note types set up procedure.
Start Date	required		date on which the note is effective
End Date	optional		date on which the note is inactive

Table 6–23 Notes Tab

Field Name	Type	Features	Description
Notes		button	opens Notes window
Done		button	returns to Organization Structure Notes window

6.4.3 Setting Up Buildings

The buildings procedure creates building codes and their associated location details.

An institution can conduct business in a number of buildings. Each building must be assigned a location code and building code.

The building code and location code combination must be unique.

Prerequisites

Locations IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the Globe icon

Expand Locations

Expand your location

Expand your venue locations

Select Buildings/Rooms

Expand your building

Select your building

Note: For a new building, you do not need to select an existing building. You must right click your mouse for a menu and select Add Building.

Steps

1. Enter data in each field of the window as described in the table.

2. Save your work.

Table 6–24 Buildings Window Description

Field Name	Type	Features	Description
Location Code	Default, display only		Location code and description
Closed	Optional	Check box	If selected, description updates and inserts are not allowed and buildings cannot be associated with the location
Buildings Region			
[DataCoordination Check box]	Optional	Check box	If selected, data in the Buildings region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Buildings region is refreshed only when the user navigates to the Building Code field in the Buildings region. Leave deselected to speed up performance when querying records.
Building Code	Required		Building code Note: The building code and location code combination must be unique.
Description	Required		Building description Note: A building record cannot be deleted if rooms in that building exist in rooms records.
Closed	Optional	Check box	If selected, all rooms in that building are changed to a Closed Check box status
Rooms		Button	Opens Rooms window

6.4.4 Setting Up Rooms IGSPS099

The rooms procedure creates an institution-defined code for each room and its associated building details.

An institution can conduct business in a number of buildings, each with individual rooms. Each room must have a room code that is associated with a location code and a building code.

The room code, building code, and location code combination must be unique.

Prerequisites
Buildings IGSPS098

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the Globe icon

Expand Locations

Expand your location

Expand your venue locations

Select Buildings / Rooms

Expand your building

Select your building

Select your room

Note: For a new room, you do not need to select an existing room. You must right click your mouse for a menu and select Add Room.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–25 Rooms Window Description

Field Name	Type	Features	Description
Location Code	Default, Display only		Location code and description
Closed	Optional	Check box	If selected, description updates and inserts are not allowed and rooms cannot be associated with the location
Building Code	Default, Display only		Building code
Closed	Optional	Check box	If selected, all rooms in that building are changed to a Closed check box status
Rooms Region			

Table 6–25 Rooms Window Description

Field Name	Type	Features	Description
[DataCoordination Check Box]	Optional	Check box	If selected, data in the Rooms region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Rooms region is refreshed only when the user navigates to the Room Code field in the Rooms region. Leave deselected to speed up performance when querying records.
Room Code	Required		Room code Note: The room code and location code combination must be unique.
Description	Required		Building description
Primary Use	Required	List of values	Primary use of the room
Capacity	Required		Room capacity
Closed	Optional	Check box	If selected, no updates or deletions are allowed Note: A room record cannot be deleted if it is recorded for any unit section.

6.4.5 Setting Up Location Relationships

Locations are places where an institution conducts business activities. Location relationships occur when users establish relationships between the various locations.

The location relationships procedure creates significant relationships that exist between different locations. Each location is assigned a location type, defined in the Location Type window, which can be mapped to one of three available system location types: Campus, Exam_Ctr, or Grad_Ctr. Users establish relationships between the various types of locations in the Location Relationships window.

Default graduation and examination locations can be set for each campus location. These default locations are used by both the Graduation and Assessment subsystems when the user allocates graduands to ceremonies and determines default exam locations for student unit attempts.

Changes to location relationships can affect the ability to inquire or report on related or previously reported groups of locations.

Changing the graduation or examination relationship, including the setting of the default check box, affects future automatic allocation of graduands or students to graduation or examination venues.

Prerequisites

Locations IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Location Relationships

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–26 Location Relationships Window Description

Field Name	Type	Features	Description
Owning Locations Region			
[DataCoordination Check Box]	optional	check box	If selected, data in the Owning Locations region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Owning Locations region is refreshed only when the user navigates to the Location Code field in the Owning Locations region. Leave deselected to speed up performance when querying records.
Location Code	required	list of values	owning location code
Description	display only		owning location code description
Location Type	display only		owning location type
Default	optional	check box	if selected, defaults the owning location code
Location Region			
Location Code	default, display only		location code
Description	default, display only		location code description
Location Type	default, display only		location type

Table 6–26 Location Relationships Window Description

Field Name	Type	Features	Description
Closed	optional	check box	if selected, prevents further use of the location code
Sub Locations Region			
Location Code	required	list of values	sub location code Note: If this location is the default examination or graduation location for the owning campus, the Default check box must be selected.
Description	display only		sub location code description
Location Type	display only		sub location types
Default	optional	check box	if selected, defaults the sub location code Note: Only a single sub location of a specified location type can be set as the default

6.5 Organizational Unit

6.5.1 Organizational Unit Lookups

You must define organizational unit lookup codes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Lookups

Steps

In the Type field, enter a lookup from the following list and enter user-defined codes for each lookup:

- OR_ORG_TYPE Organization Type
- OR_MEMBER_TYPE Member Type

6.5.2 Setting Up Organizational Statuses - Organization Status Tab IGSOR032

An organizational status is a description of the level of activity of an organizational unit. An organizational unit is typically defined as a department, school, faculty, division, or branch of an institution.

The organizational statuses procedure creates institution-defined organizational statuses. Organizational statuses can be created with a particular meaning within an institution. Each institution-defined organizational status must be assigned a system organizational status recognized by Student system and used for other functionality.

For example, an institution can decide to use an organizational status called Current. An appropriate system organizational status, in this case Active, is assigned to Current. Once an organizational status is assigned to an organizational unit, the system organizational status can never be altered.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window > Organizational Status tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–27 Organizational Status Tab

Field Name	Type	Features	Description
Organizational Status Tab			
Organizational Status	Required		Organizational status Note: When a new organizational status is entered, the system organizational status defaults to Active.

Table 6–27 Organizational Status Tab

Field Name	Type	Features	Description
Description	Required		Organizational status description Note: If an organizational status has been used in the definition of an organizational unit, its description can be modified only if the change is minor and does not alter the meaning.
System Organizational Status	Required	List of values	System organizational status; active or inactive Note: If an organizational status has been assigned to one or more organizational units, its system organizational status cannot be changed. Typically, a new organizational status is created.
Closed	optional	check box	If selected, prevents further use of the organizational status Note: If an organizational status has been assigned to an organizational unit, it cannot be deleted.

6.5.3 Setting Up Organizational Units IGSOR030

An organizational unit is a business entity, division of an institution, or organizational structure, identified by its organizational unit code and start date.

The Organizational Units window enables users to change the status of all dependent organizational units if a change to the parent unit’s status also changes its system status from Active to Inactive.

Modifying an organizational unit record results in the generation of a history record.

Typical organizational units in educational institutions include faculties, divisions, schools, departments, branches, and institutes.

Prerequisites

Member Types IGSOR032

Organizational Types IGSOR032

Organization Unit Statuses IGSOR032

Institutions IGSOR032

Organizational Structure Alternate ID Types (optional) IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organizational unit.

The Organization tab appears.

Click **Organization Details**.

Note: For new institutions, you must right click your mouse and select Add Organization.

Steps

Enter data in each field in the window as described in the table. Save your work.

UK Note: Other institutions providing teaching reported to HESA are set up as Oracle Student System organizational units. To set up organizational units, perform the following steps.

Table 6–28 Organizational Units Window Description

Field Name	Type	Features	Description
Organizational Unit Code	Required		Organizational unit codes can be auto generated by setting the HZ: Generate Party Number profile option to Yes or manually entered by setting the profile option to No Note: The organizational unit and institution codes can be either user-defined or system-defined.
CSS ID	Optional		CSS ID
Start Date	required	calendar	organizational unit start date; defaults to current date
End Date	optional	calendar	end date Note: An end date can be saved only if the unit's system status is Inactive, and it must be the same as the current date or earlier.
Description	required		organizational unit description
Organizational Status	required	list of values	organizational status

Table 6–28 Organizational Units Window Description

Field Name	Type	Features	Description
Organizational Type	required	list of values	organizational type and description
Member Type	required	list of values	member type and description
Institution Code	required	list of values	institution code and description
Preferred Alternate ID Type	Display only		Displays preferred alternate ID type. Note: You can change your selection of preferred alternate ID in the Identifier tab on this window. Note: The type is display only but the field to enter alternate ID is enterable.
Preferred Alternate ID	Optional		Value of the Alternate Identifier
[Descriptive Flexfield]	optional		user-customization field

Guidelines

If the change to the organizational status results in its system status changing from Active to Inactive, and the organizational unit has active child units, an error message advises that the change cannot be made.

Click **OK** in the error message.

Another message appears that gives users the option to propagate the changed status to all child records. The propagate function changes the status of each child unit to mirror the parent unit’s status. Clicking **Cancel** stops the propagation process, and the dependent organizational units are not changed.

WARNING: If a propagation process is carried out, but it is decided later to reverse the changes, the organizational status is changed to a system status of Active. This status reversal does not propagate to dependent organizational units. Each child unit status must be changed individually.

Note: The propagation process does not succeed if an organizational unit in the propagation has other active parent organizational units or if the end date being propagated is before the start date of a child record.

6.5.3.1 Setting Up Addresses

The addresses procedure enables users to enter addresses, usage and contact details for persons, institutions, organizational units, locations, or venues.

Addresses can be stored for a person, institution, organizational unit, location, or venue. Valid addresses for these entities are indicated by the start date. If an end date is entered, the address is valid for the time period between the start and end dates.

An address can be assigned multiple usages, such as Bill-To, Postal, or Home.

Contact information can also be assigned, such as telephone numbers and E-mail addresses.

Prerequisites

Organization Units IGSOR032

Institutions IGSOR029

Oracle Receivables Address validation must be setup.

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the Address tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–29 Address Tab

Field Name	Type	Features	Description
Address Tab			
Effective Start Date	required	calendar	address start date

Table 6–29 Address Tab

Field Name	Type	Features	Description
Effective End Date	required	calendar	address end date
Primary	optional	check box	if selected, indicates an organizational unit's primary address
Country	required	list of values	country name
Address	required		complete residence or office address
City	Required depending on country and validations set up in Oracle Receivables for sales tax validation	list of values	city name
State	Required depending on country and validations set up in Oracle Receivables for sales tax validation	list of values	state name
Province	Optional		province name
County	Required depending on country and validations set up in Oracle Receivables for sales tax validation	list of values	county name

Table 6–29 Address Tab

Field Name	Type	Features	Description
Zip Code	Required depending on country and validations set up in Oracle Receivables for sales tax validation	list of values	area zip code
Delivery Point Code	Optional		mail delivery point code
Effective Dates			Effective dates of address
Usage			Address usage
Active	optional	Check box	If selected, indicates address is active
Contacts	Optional	Button	Opens the Address Contacts window

6.5.3.2 Setting Up Contact Information

Oracle Student System records an organization unit's telephone number, telephone type, extension number, e-mail address, residence area code, and country code.

The phone and e-mail procedure enables users to enter an organization unit's telephone number, and email address.

Prerequisites

Institutions IGSOR029

Organization Units IGSOR032

Addresses must exist.

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the Address tab.

Click **Contacts**.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–30 Contacts Window

Field Name	Type	Features	Description
Contacts Window			
Email format	required	list of values	user extensible email format
Email Address	required		organizational unit's email address
Primary	optional	check box	if selected, indicates an organizational unit's primary email address
Closed	optional	check box	if selected, prevents further use of email address
[Descriptive Flexfield]	optional		user-customization field
Done		button	returns users to the Organizational Unit Details window

6.5.3.3 Setting Up Organizational Unit Location

An organizational unit location is a physical site associated with an organizational unit. An organizational unit can be located at one or more physical locations.

The organizational unit locations procedure enters records of all locations applicable to an organizational unit. If the window is entered using the navigation button in the Organizational Units window, this region displays the record in use in that window.

Prerequisites

Institutions IGSOR029

Organization Units IGSOR032

Locations IGSOR031

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the Locations tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–31 *Location Tab*

Field Name	Type	Features	Description
Location Tab			
Location Code	Required	List of values	User-defined location codes
Description	Display only		Description of location

6.5.3.4 Setting Up Alternate IDs

Student System enables users to enter institution or organizational unit identifiers assigned by external agencies. These identifiers are alternate identifiers because they are in addition to the identifier assigned by the user to the same institution or organizational unit.

Prerequisites

Institutions IGSOR029

Organization Units IGSOR032

Organizational Structure Alternate ID Types IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the Identifier tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–32 Identifier Tab

Field Name	Type	Features	Description
Identifier Tab			
ID Type	required	list of values	ID type; for example, Pell ID, Degree Audit, College Scholarship Service Identifier (CSSID)
Alternate ID	required		alternate ID; an identifier by which the institution or organizational unit is also known
Start Date	required	calendar	date on which the alternate ID is effective
End Date	optional	calendar	date on which the alternate ID is inactive

6.5.3.5 Setting Up Organizational Structure Accreditation Details

Organizational structure accreditation details are descriptions of accreditation status.

Each institution or organizational unit can be accredited by one or more accreditation agencies. The accreditation agency cannot be the same the institution that the organization belongs to.

Accreditation details appear alphabetically in ascending order by accreditation agency code.

Prerequisites

Institutions IGSOR029

Organization Units IGSOR032

Accreditation Statuses

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the Identifier tab.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–33 Accreditation Tab

Field Name	Type	Features	Description
Accreditation Tab			
Accreditation Agency	required	list of values	accreditation agency Note: An accreditation agency must be created as an institution within Oracle Student System. Once created, cannot be modified.
Accreditation Status	required	list of values	accreditation status; once created cannot be modified Note: A combination of status and accreditation agency must be unique over a date range.

Table 6–33 Accreditation Tab

Field Name	Type	Features	Description
Start Date	required	calendar	accreditation status start date; once set cannot be modified Note: Users cannot set the Start Date to be less than the organization start date.
End Date	optional	calendar	accreditation status end date

6.5.3.6 Reviewing Organizational Unit History

The organizational unit history tab displays the history of changes to an institution code.

Prerequisites

Institutions IGSOR029

Organization Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Expand Institutions.

Select your institution.

Expand your institution.

Select your organization unit.

The Organization tab appears.

Click **Organization Details**.

The Organization Unit Details window appears.

Select the History tab.

Steps

View data in the window.

Table 6–34 History Tab

Field Name	Type	Features	Description
Telephone Number	Required		Organization unit’s telephone number

Table 6–34 History Tab

Field Name	Type	Features	Description
Extension	optional		Organization unit's telephone extension number
Type	required	list of values	telephone usage type
Primary	optional	check box	if selected, indicates an organizational unit's primary telephone number
Closed	optional	check box	if selected, prevents further use of the telephone number
[Descriptive Flexfield]	optional		user-customization field
Contacts window - Email Region			
Email format	required	list of values	user extensible email format
Email Address	required		organizational unit's email address
Primary	optional	check box	if selected, indicates an organizational unit's primary email address
History Tab			
History Start Date	Default, display only		Date of history
Description	Default, display only		Name of Organizational Unit
Details Region			
Member Type	Default, display only		Member type of institution
History End Date	Default, display only		History end date of institution
Institution Code	Default, display only		Code of institution
Institution Name	Default, display only		Name of institution

6.5.3.7 Setting Up Organizational Structure Notes

Organization structure notes are comments or descriptive text that users enter about institutions, organizational units, or locations.

Prerequisites

- Institutions IGSOR029
- Organization Units IGSOR032
- Organizational Structure Note Types IGSOR032

Responsibility

- Oracle Student System Super User

Navigation

- Expand Institutions.
- Select your institution.
- Expand your institution.
- Select your organization unit.
- The Organization tab appears.
- Click **Organization Details**.
- The Organization Unit Details window appears.
- Select the Notes tab.

Steps

- Enter data in each field of the window as described in the table. Save your work.

Table 6–35 Notes Tab

Field Name	Type	Features	Description
Notes Tab			
Note Type Description	required	list of values	organization note type Note: The note type descriptions originate from the organizational structure note types set up procedure.
Start Date	required		date on which the note is effective
End Date	optional		date on which the note is inactive
Notes	Optional	button	opens Notes Text window
Done		button	returns to Organization Structure Notes window

6.5.4 Setting Up Organizational Unit Relationships IGSOR015

An organizational unit relationship is representing relationships between entities of an institution. Typical organization units include colleges, schools, departments, and institutes.

Changes to organizational unit relationships can affect the ability to inquire or report on groups of related organizational units. For example, a school could be set up as the child of a college and the parent of associated departments.

Organizational Unit Relationships window enables users to query the relationships for an organizational unit other than the one initially displayed. Organizational unit relationships cannot be created with an inactive organizational unit. An organizational unit cannot have a parent, child, grandparent, or similar relationship to itself. If the context organizational unit is active, one parent or child unit must be active.

Note: The record is logically rather than physically deleted to permit later inquiry on former relationships. The current date is inserted as the deletion date by the system. Same Org cannot be both Parent and Child. A logically deleted parent record can be made as child and vice versa.

Prerequisites

Organizational Units IGSOR032

Organizational Unit Locations IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Setup > Organizational Structure > Organization Unit Relationships

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–36 Organizational Unit Relationships Window Description

Field Name	Type	Features	Description
Parent Organizational Units Region			
Org Unit Code	required	list of values	organizational unit code

Table 6–36 Organizational Unit Relationships Window Description

Field Name	Type	Features	Description
Start Date	required	calendar	organizational unit code start date
Description	display only		org unit code description
Org Status	display only		org status
Creation Date			org unit parent relationship creation date
Deletion Date			org unit parent relationship deletion date
Include Deleted Relationships	optional	check box	if selected, also inquires on deleted relationships along with active records
Org Unit Code	default, display only		organizational unit code
Start Date	default, display only		organizational unit start date
Description	default, display only		organizational unit code description
Org Status	default, display only		organizational unit status
Child Organizational Units Region			
Org Unit Code	required	list of values	organizational unit code
Start Date	required	calendar	organizational unit code start date
Description	display only		org unit code description
Org Status	display only		org status
Creation Date			org unit child relationship creation date
Deletion Date			org unit child relationship deletion date

6.6 Function Filter

6.6.1 Function Filter Organization Structure Setup - Function Filter Tab IGSOR032

Use this tab to enable each subsystem's windows to display institutions' organizational units by logical attributes. The logical attributes establish the filtering on each specified function for an institution or organizational unit.

Each window can be configured by logical attributes available in institutions and organizational units. Each window will need to display the institutions or organizational units in the list of values based on the attributes assigned in the Organizational Structure Filter Configuration window.

Note: This is an optional setup. If the organizational structure filter configuration has not been established for a particular function, then all organizational units or institutions will appear in the list of values for a particular function.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setup > Organizational Structure > Organizational Structure Data Setup > Function Filter tab

Steps

Enter data in each field of the window as described in the table. Save your work.

The following table shows seed data and lists of values required.

Table 6–37 Seed Data for Organizational Structure Function Filter Tab

Field Name	List of Values Name	Valid Values
Window Name	ORG_FILTER_FUNC_NAME	Program > Basic Program Details Program Ownership Program Award Units > Basic unit details Teaching responsibilities Unit Set > Basic Unit Sets Research Supervisors Scholarship Types Examination Supervisor Details Organizational Unit Progression configuration Financial Aid Office Student External and Internal Jobs Unit Version Legacy API Teaching Responsibility Legacy API Unit Section Legacy API Research Supervisor Legacy API Level Advanced Standing Legacy API Unit Advanced Standing Legacy API Progression Outcome Legacy API International Employment Employer International Visa Agent

Table 6–37 Seed Data for Organizational Structure Function Filter Tab

Field Name	List of Values Name	Valid Values
Attribute Type	OR_ATTR_TYPE	Institution Attributes: <ul style="list-style-type: none"> ■ Institution Type ■ Institution Control Type Organizational Unit Attributes: <ul style="list-style-type: none"> ■ Organization Type ■ Member Type These values are restricted by window based on if the window displays institution or organizational units.
Attribute Value	OR_ATTR_VALUE	If Attribute Type is Institution Type, then all open records from IGS_OR_ORG_INST_TYPE_ALL available in list of values. If Attribute Type is Institution Control Type, then all open records from FND lookup OR_INST_CTL_TYPE available in list of values. If Attribute Type is Organization Type, then all open records from FND lookup OR_ORG_TYP.available in list of values. If Attribute Type is Member Type, then all open records from FND lookup OR_MEMBER_TYPE available in list of values

The following table shows function names with institution and organization attributes.

Table 6–38 Function Names with Institution and Organization Attributes

Function Names	Institution or Organization Attribute
Program > Basic Program details	Organization attribute
Program Ownership	Organization attribute
Program Award	Organization attribute
Basic unit details	Organization attribute
Teaching responsibilities	Organization attribute
Basic Unit Sets	Organization attribute
Research Supervisors	Organization attribute
Scholarship Types	Organization attribute

Table 6–38 Function Names with Institution and Organization Attributes

Function Names	Institution or Organization Attribute
Examination Supervisor Details	Organization attribute
Organizational Unit Progression configuration	Organization attribute, query only
Financial Aid Office	Organization attribute
Student External and Internal Jobs	Organization attribute
Unit Version Legacy API	Organization attribute
Teaching Responsibility Legacy API	Organization attribute
Unit Section Legacy API	Organization attribute
Research Supervisor Legacy API	Organization attribute
Level Advanced Standing Legacy API	Institution attribute
Unit Advanced Standing Legacy API	Institution attribute
Progression Outcome Legacy API	Organization attribute

Guidelines

When the function is selected in the Function Name field, the function is identified with either institution or organizational unit.

If the function selected is identified for Institution then the attribute types available will be the ones identified as Institution attributes. Examples include institution type and institution control type.

If the function selected is identified for organizational unit then the attribute types available will be the ones identified as institution attributes. Examples include organization type and member type.

If the organization structure filter configuration has not been established for a particular function then all organizational units or institutions will appear in the list of values for the particular function.

Table 6–39 Filter Function Tab

Field Name	Type	Features	Description
Filter Function Tab			
Function Name	Required	List of values	Name of function Valid values include seeded list of functions that reference institution or organizational unit Note: Only functions that exist in the list of values are allowed
Attribute Type	Required	List of values	System seeded attributes Only attribute types that exist in the list of values are allowed. Attribute types are restricted to the corresponding window.
Attribute Value	Required	List of values	System seeded attributes
Description	Display only		Description of attribute value populates into this field

6.7 Venues

6.7.1 Setting Up Venues IGSAS017

Prerequisites

Person Details IGSPE034

Locations IGSOR032

Note: Location must be of location type Graduation Center or Exam Center.

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the Globe icon

Expand Locations

Expand your location

Expand your venue locations

Select Venue

Note: For a new venue, you do not need to select an existing venue. You must right click your mouse for a menu and select Add Venue. Venues can only be established for exam and graduation locations.

Venue Tab

The following are located on the Venue tab:

- Venue Code
- Closed check box

Note: Select this check box to disable future use of a venue code.

- Description
- Coordinator
- Supervisor Limit
- Priority Code
- Number of Seats
- Seating Information
- Comments

To change any information on this tab, click **Venue Details**.

To access the Venue Session Availability window, click **Session Availability**.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 6–40 Venue Details Window Description

Field Name	Type	Features	Description
Location Code	Default, Display only		Location code and description
Closed	Optional	Check box	If selected, indicated a closed location
Venue Code	Required		Unique venue code Note: Entering a unique venue code creates a new record. A venue associated with a graduation location does not require a supervisor limit or priority code to be entered. Venue codes can be created only for locations with a system-defined location type of EXAMP-CTR or GRD-CTR
Closed	Optional	Check box	If selected, prevents further use of the venue code Note: A closed venue code cannot be reopened if the location is closed
Description	Required		Venue code description
Coordinator	Optional		Coordinator person number and full name Note: Coordinator must have the Staff person type.
Supervisor Limit			Supervisor limit Note: The supervisor limit indicates the maximum number of supervisors required for a venue and is used in the Supervisors to Venue window to validate the number of supervisors assigned to a venue within a session.
Priority Code			Priority code Note: The priority code indicates the order of preference for venues in cases in which more than one venue is available for the examination location. No automated functionality is associated with this value.
Address Tab			
Start Date	required	calendar	address start date
End Date	required	calendar	address end date
Primary	optional	check box	if selected, indicates an institution's primary address
Country	required	list of values	country name

Table 6–40 *Venue Details Window Description*

Field Name	Type	Features	Description
Address	required		complete residence or office address
City	Required depending on country and validations set up in Oracle Receivables	list of values	city name
State	Required depending on country and validations set up in Oracle Receivables	list of values	state name
Province	Optional		province name
County	Required depending on country and validations set up in Oracle Receivables	list of values	county name
Postal Code	Required depending on country and validations set up in Oracle Receivables	list of values	area postal code
Delivery Point Code	Optional		mail delivery point code
Usages	Required	List of values	Address usages Note: Usages can be entered on the Address tab.
Contact	Optional	Button	Opens the Address Contacts window for you to enter phone number and email information per address.

Table 6–40 Venue Details Window Description

Field Name	Type	Features	Description
Seating Details Tab			
Number of Seats	Required		Number of seats Note: The value in this field is used by the examination timetabling subsystem to allocate students to venues.
Seating Information	Optional		Seating information
Bookings and Resources Details Tab			
Booking Cost	Optional		Venue booking cost
Booking Information	Optional		Venue booking information
Available Resources	Optional		Available resources
Instruction and Announcements Tab			
Instructions	Optional		Instructions
Announcements	Optional		Venue announcements
Comments Tab			
Comment box	Optional		Comments about venues

Systemwide Services: Tracking

7.1 Tracking

Tracking enables institutions to monitor the movement of documents or the progress of defined processes. As documents or processes proceed through a series of steps, they are recorded in Oracle Student System. These steps determine progress of the document or process.

The Tracking windows monitor the movement of documents or the progress of defined processes. As documents or processes proceed through sequential steps, these steps are recorded in the system. Progress is determined by the steps that are completed.

Each item being monitored is called a tracking item.

Tracking items can be manually recorded or started by processes within other subsystems. Table 7–1 describes examples of system-initiated tracking items.

Table 7–1 System-Initiated Tracking Items

Subsystem	Tracking Item
Admissions	Applications for admission can be monitored through the approval and offer process.
	Rejected offers can be monitored if the application for admission will be considered for other program preferences in subsequent rounds.
Advanced Standing	Manually-assessed advanced standing applications can be tracked through the approval process.
Assessments	Applications for extensions to due dates of assessment items can be recorded individually and monitored.

Table 7–1 System-Initiated Tracking Items

Subsystem	Tracking Item
	Preparation and printing of examination papers and mark sheets can be monitored.
	Each application for special consideration in the determination of results can be tracked.
	Applications for review of student unit attempt outcomes, or results, can be individually tracked.
Research	Tracking thesis examinations and thesis panel members.

A tracking type is the set of requirements a tracking item must be associated with a person. Once the appropriate definition of requirements sets is established as tracking types, they can be associated with people through a tracking item.

For example, the Admissions subsystem maps predefined tracking types to applicants based on the admissions process category combined with the use of rules to distinguish unique requirements based on applicant characteristics.

As required documents or steps are met for a given process, Tracking reflects the current status of the completed steps. Steps and items can be manually updated.

Data that is imported into Oracle Student System through Test Scores, Application Personal Statement, or Credentials can be linked to a tracking step and marked as complete by running the concurrent process to update a tracking step.

Terminology

A tracking item is a document or process monitored by the Tracking windows.

A tracking type is an institution-defined type that identifies and classifies items being tracked, which maps to system-defined tracking types.

A system tracking step type classifies tracking steps based on the system seeded type.

A tracking step catalog is master catalog of steps. Institutions have the option of creating a tracking step catalog.

A step group is a group of steps linked together. If two or more steps share the same step group number, then only one of the steps needs to be completed to satisfy the requirement. Not all the steps in the group need to be completed for the Tracking Item to be completed.

Reference Data

This section provides system administrators and subsystem specialists with information required to set up and maintain Tracking reference data.

Setting up reference data for Tracking includes the following parts:

- Tracking Items
- Tracking Item Progress
- Tracking Item Inquiries
- Tracking Types IGSTR001
- Tracking Statuses IGSTR003
- Tracking Note Types IGSTR004
- Tracking Notes
- Tracking Step Catalog IGSTR011
- Tracking Groups IGSTR005

Tracking Items

Tracking items are manually recorded in the Tracking Items window. The following details are recorded:

- status of the tracking item
- tracking type of the tracking item
- person who is the subject of the tracking item, if applicable
- tracking item's originator
- steps involved in the process being tracked

Each tracking item is recorded with a Completion Required By date. The date is calculated by the system as the tracking item's start date plus the number of target days for its tracking type, as specified in the Tracking Item Notes window.

Each tracking item should be associated with a set of tracking steps. A tracking type associated with a tracking item can have a set of default tracking steps. The set of default steps can be modified by adding new steps or deleting existing steps.

Every step is assigned an action date and a recipient. For default steps, the action date is inserted by the system and is calculated as follows:

- for nonsequential steps, the tracking item's start date plus the action days allowed for that step to be performed

An action date must be manually calculated and entered for steps that are added.

- for sequential steps, the tracking item's start date plus the action days for any previous steps plus the action days allowed for that step to be performed

An action date must be manually calculated and entered for steps that are added. Later steps are adjusted by the additional number of action days. When the action date of a step is altered, or the completion date of a step is earlier or later than its action date, the system recalculates action dates for subsequent steps.

The default recipient for each step is either specified in the Tracking Item window or the originator of the tracking item becomes the default. The recipient can be overridden. If additional steps are added in the Tracking Items window, the recipient must be entered manually.

Steps not required can be bypassed. When steps are bypassed, the system adjusts calculated action dates.

In performing date calculations, the user can specify whether only business days are to be used and whether the tracking steps must be performed in order / sequence.

Tracking Item Progress

Once a tracking item is created, the Tracking Items window records when each step of a tracking item is completed. Setting the Step Completion flag to Yes causes the current date to be recorded as the completion date, but this completion date can be overridden.

When all tracking steps of a tracking item are complete, the completion date of the last step is automatically recorded as the completion date of the item. The status of the item is manually set to COMPLETE.

The tracking process can be completed without all steps being performed if the remaining steps are no longer required, or a tracking item is cancelled.

To end the tracking process, click **Early Exit** in the Tracking Items window and click an appropriate tracking status when prompted. Incomplete steps have the Bypass indicator set, and the completion date of the tracking item is set to the current date.

Tracking Item Inquiries

The Tracking Items window is used to inquire about tracking items. Querying by attributes other than tracking ID is likely to return multiple records. When the

required record is located, its tracking steps are displayed. Progress of a tracking item is determined by completed or bypassed steps.

Tracking Types IGSTR001

Institution-defined tracking types are recorded in the Tracking Types window and are mapped to a tracking type recognized by the system. There are four system tracking types: Admission Processing Assignment Post Admission, Research Thesis Examination Tracking Item, Research Thesis Panel Member Tracking Item, and Undefined.

A number of target days must be recorded for each tracking type. Target days represent the time needed to complete a particular tracking item. The system uses target days to calculate the value of the Completion Required By date field for a tracking item.

Tracking types can be set to use either business days or calendar days in date calculations.

The process for tracking items of a particular tracking type is defined by tracking type steps. Tracking type steps are assigned to a tracking type in the Tracking Types window and are associated with tracking items that belong to that type when the items are created in the Tracking Items window. The number of action days recorded with each tracking type step is used to calculate the action date of the tracking item step. Steps can be completed sequentially or nonsequentially.

Each step can have a recipient associated with it. The recipient identifies the person responsible for performing the step and is optional. A default recipient can be created for each tracking type step. The default recipient can be overridden in the Tracking Items window.

Notes can be recorded for a tracking type step using the Tracking Item Notes window.

Tracking Statuses IGSTR003

Institution-defined tracking statuses are recorded in the Tracking Status window and must be mapped to one of the following tracking statuses recognized by the system:

- **ACTIVE**, indicating the tracking item is started and is in progress
- **CANCELLED**, indicating the tracking item was terminated by the tracking item originator before all steps were completed. The system sets any tracking incomplete steps to **BYPASSED** status.
- **COMPLETE**, indicating all tracking item steps are complete or bypassed

Tracking statuses are applied to both tracking items and tracking groups to indicate the current state of activity.

Tracking Note Types IGSTR004

Institution-defined tracking note types categorize notes in the Tracking subsystem, and are recorded in the Tracking Note Types window. Note types can represent:

- PURPOSE, for notes describing the purpose of a tracking step
- SUPPORT, for notes describing documentation received in support of a tracking item
- COMMENT, for notes describing the performance of a tracking step

Tracking Notes

Note functionality records detailed notes about records in the Tracking subsystem. Notes can record the following information:

- purpose of tracking steps
- documentation received in support of tracking items
- description of the performance of tracking steps

Tracking Step Catalog IGSTR011

The tracking step catalog enables users to enter tracking steps. These steps can be combined with each other to create tracking types. Schools can pre-define a master tracking step catalog for ease of use and consistency in tracking step type definitions.

If a tracking step is not pre-defined in the step catalog, it can still be defined as an additional step in any tracking type or item. To prevent duplicate steps being created for the same purpose, an institution can have a pre-defined collection of tracking steps. When any two tracking steps have the same system step type, each step receives the same treatment since Student System processes system-defined values that are already identified. Examples of system-defined values include test, credential, submission of test scores, and transcripts.

Tracking Groups IGSTR005

The Tracking Groups window records tracking items with a common characteristic, and monitors progress of the items as a group. A tracking group has the status ACTIVE if it has one or more open tracking items and the status COMPLETE if all tracking items are complete or cancelled. Individual tracking items are managed

individually. Tracking item records that belong to one or more groups have a GROUP MEMBER lamp displayed in the corner of the Tracking Items window.

7.1.1 Setting Up Tracking Statuses IGSTR003

A tracking status is the status defined by an institution for a tracking item indicating whether it is active, cancelled, or completed. Each tracking item is assigned a tracking status. Users can also specify default tracking statuses and close a tracking status to avoid replication.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Tracking > Status > Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 7–2 Tracking Status Window Description

Field Name	Type	Features	Description
[Data Coordination Check box]	Optional	Check box	If selected, data in the Tracking Status window is automatically refreshed and coordinated; if deselected, data in the Tracking Status window is refreshed only when the user clicks in the Tracking Status region. Leave deselected to speed up performance when querying records.
Tracking Status	Required		Institution-defined status which corresponds to a system tracking status value; for example, a status CURRENT could map to the system status ACTIVE.
Description	Required		Tracking status description
System Tracking Status	Required	List of values	System-defined tracking status; values are Active, Cancelled, and Complete
Default	Required	Check box	If selected, indicates selected tracking status as default
Closed	Optional	Check box	If selected, prevents further use of a catalog step

7.1.2 Setting Up Tracking Step Catalogs IGSTR011

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Tracking > Step Catalog window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 7–3 Tracking Step Catalog Window Description

Field Name	Type	Features	Description
Step Catalog Code	Required		Code identifier for a step catalog
Description	Required		Step catalog description
System Tracking Step Type	Required	List of values	System value; value recognized by system for specific functionality
Action Days	Required		Specifies the number of days to complete the tracking step catalog
Used By	Display only		Subsystem which uses the step Value is defaulted in when selecting the System Tracking Step Type Note: Use the value Undefined if the step does not apply to any subsystem. For system tracking step types that can be used in multiple system processing (for example test, transcript, credential), then the Used By is Undefined.
Publish	Required	Check box	Displays tracking step in Self Service
Closed	Required	Check box	If selected, prevents further use of the tracking step catalog

7.1.3 Setting Up Tracking Note Types IGSTR004

Use this procedure to set up a tracking note type. A tracking note type is a classification of tracking notes such as Comments, Purpose, or Support.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Tracking > Note Types > Note Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

7.1.4 Setting Up Tracking Types IGSTR001

Each institution-defined tracking type can be mapped to a system-defined tracking type. Individual items or processes are monitored through steps defined for their corresponding tracking type. A tracking type and its associated tracking steps are used as starting points when creating tracking items.

All system tracking types, except for undefined tracking types, are associated with built-in system processes. For example, the system tracking type assignment is linked to institution-defined tracking types and are used by the assessments sub-system to monitor the movement of assignments.

Tracking types can be used by an institution to pre-define a set of required steps for a given process. Depending on the sub-system, these required steps can be used for different purposes. For example, the admissions sub-system defines different tracking types for each category of the admission process applying to undergraduate, degree seeking, early decision, and special programs.

Prerequisites

Tracking Note Types IGSTR004

Tracking Step Catalogs (optional) IGSTR011

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Tracking > Types > Tracking Types window

Steps

Enter data in each field of the Tracking Types window as described in the table.
Save your work.

Table 7-4 Tracking Types Window Description

Field Name	Type	Features	Description
Tracking Type	required		institution-defined type used to assist in identifying and classifying items being tracked; are mapped back to system-defined tracking types recognized for system functionality
Description	required		tracking type description
System Tracking Type	required	list of values	value recognized by the system for specific functionality; each institution-defined tracking type is mapped to a system tracking type
Target Days	required		indicates the maximum number of days required to complete all steps; used in conjunction with the Business Days Only indicator to calculate the Completion Required By date for an item
Business Days Only Indicator	optional	check box	if selected, calculates tracking item completion dates based on business days only
Publish	Optional	Check box	if selected, displays published steps and the specified item in self-service
Sequential	Optional	Check box	if selected, determines whether an item's tracking steps must be completed in sequence, and whether calculated action dates for tracking steps are progressive
Closed	Optional	Check box	if selected, prevents further use of the tracking type
Tracking Type Steps Region			
[Data Coordination Check Box]	Optional	Check box	if selected, data in the Tracking Types window is automatically refreshed and coordinated; if deselected, data in the Tracking Types window is refreshed only when the user clicks in the Tracking Type Steps region. Leave deselected to speed up performance when querying records.
Display All Catalog Steps	optional	check box	if selected, displays all catalog steps

Field Name	Type	Features	Description
Step	required		activity required to process a tracking item and identified by a system generated number; number represents an imposed order for step completion when the Sequential indicator is set; if not, tracking steps can be completed in any order
Catalog Code	required	list of values	code used when populating steps for Tracking Types
Description	required		catalog code description
Step Group ID			sequence number used as an identifier for tracking step groups
Action Days	required		specifies the normal maximum number of days to complete a tracking step for tracking items in conjunction with Sequential and Business Days Only indicators
Recipient	required		person number and name to whom the tracking item is sent for a particular step
Find Person		icon	opens Find Person window
System Step Type	Display only		system-defined step type assigned to a tracking type
Publish Step	Optional	check box	if selected, publishes tracking step type
Update Group Limit		button	opens the Step Group Limits window
Tracking Type Step Notes		button	opens the Tracking Type Step Notes window

7.1.5 Setting Up Tracking Type Step Notes IGSTR002

The Tracking Type Step Notes window maintains notes against individual tracking type steps. These notes can contain reasons for the step's existence, reasons for the specification of a particular recipient, or details of the step's procedure.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Tracking > Types window

Steps

1. Query the appropriate tracking type record.
2. Select the appropriate tracking type step.
3. Click Tracking Type Step Notes.
The Tracking Type Step Notes window appears.
4. Select the required note format.
5. Click Edit Note to edit or add notes.
6. Save your work.

Program Structure and Planning

8.1 Program Structure and Planning Overview

The Program Structure and Planning subsystem enters and maintains details related to the following items:

- programs
- units
- program groups
- unit sets, including majors
- unit sections

The programs and units defined in this subsystem are used in the following subsystems:

- Admissions, in which prospective students apply for admission to programs, or to single units, and are made offers of enrollment in programs
- Enrollments, in which students are enrolled in programs, units, and unit sets
- Advanced Standing, in which programs and units can be the basis for advanced standing applications, and advanced standing can be granted in units or at unit levels
- Assessments, in which units have assessment items such as exams and assignments, and programs and units have grading schema
- Government Statistics, in which unit and program details are included in files submitted to the government
- Advanced Recruitment, which includes marketing online and telesales

- Student Finance, in which student fees can be managed when students apply for admission and enrol in programs
- Financial Aid, in which student administration and financial management of higher education can be managed

Career Configuration

This section provides an overview of the Career functionality.

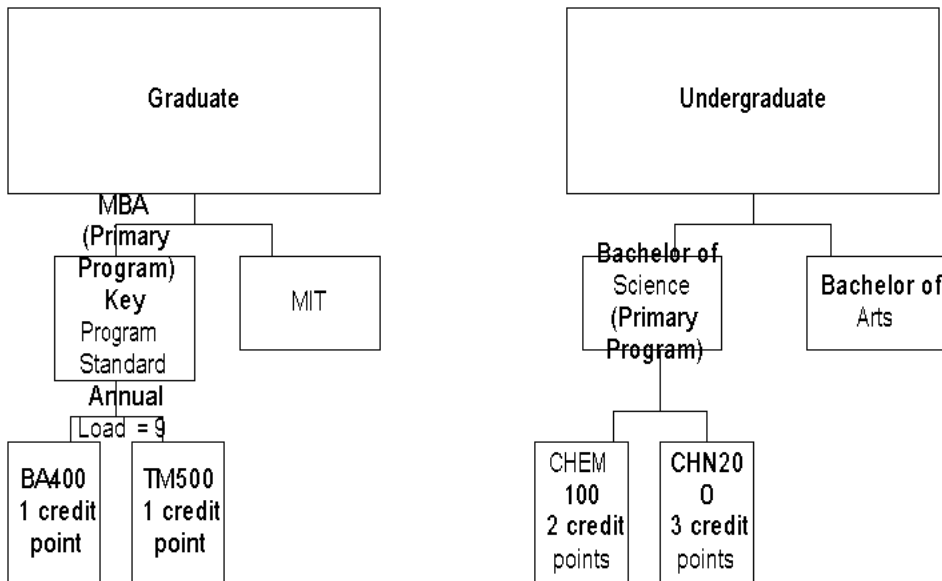
The following sections are in this chapter:

- Purpose
- Career Overview
- Terminology
- Derivation
- Program Transfer
- Impact on Other Subsystems

Purpose

If Oracle Student System is configured for a career centric approach by setting the IGS: Career Model Enabled profile option to Yes, a student is linked to a career or program type, which includes undergraduate, graduate, and professional. Unit attempts are linked to those student careers, which may include one or more program attempts. Unit attempts may be applied to multiple programs or to no programs.

The student career is derived from the program type of the program he or she is attempting.

Figure 8–1 Student Career Example

In this example, the student academic record consists of the student's undergraduate career. This career is linked to two program attempts: BA-History and BS-Engineering.

The units in which the student is enrolled are applied to the student's career.

Career Overview

Academic reporting in institutions in the United States is primarily done by a student's career. Financial Aid evaluates a student's enrollments and progress and bill tuition and fees using career functionality.

Primary program is an attribute of program attempts. This is used for students who are enrolled in multiple programs within a program type or career within an institution. The primary program enables users to specify on which program to base billing, enrollment validations, and academic statistics.

The following applies to career functionality:

- programs belong to only one career
- students can be in multiple careers, and within each career, students can study toward multiple programs

- admissions admits multiple concurrent programs as two separate application instances
- users must define a primary program attempt within each career
- all new unit attempts are recorded under the primary programs during enrollment

Note: New unit attempts cannot be enrolled within a program attempt not marked as primary.

- program attempt statuses of non-primary programs are controlled and validated against the status of the primary program within the same career

Administrative users configure Oracle Student System for a career centric approach and set up the relationships among career, program and units.

Terminology

The following table describes career and program terminology.

Table 8–1 Career and Program Terminology

Term	Definition
Career-centric approach	Oracle Student System requires a single program to be designated as the key program for each student. Each career also has a primary program that identifies all units in the career. The Key program can be used for fee calculation and attendance type calculation. In the career centric model, students can be in multiple programs, but these programs must belong to a career. A student can have multiple careers.
Program-centric approach	Oracle Student System requires a single program to be designated as the key program.
Program	Institution-defined classification of units. Students can have multiple programs and programs do not have relationship with each other.
Career	Grouping of programs within a program type. Multiple programs are grouped into a career, and the primary program defines a career.
Program type	Institution-defined organization of programs. Examples include graduate, undergraduate, and professional.
Primary career	Indicates the career that the institution defines as default

Table 8–1 Career and Program Terminology

Term	Definition
Program attendance type	Based on all units for that program; one attendance type for each program
Career attendance type	Based on units in the program designated as primary; one attendance type for career
Institution attendance type	Based on all enrolled unit; total credit points divided by annual load for primary career or key program
Program class standing	Calculation of a student's progress within a program. Examples include freshman, sophomore, and junior.
Career class standing	Calculation of a student's progress within a career or primary program. Examples include undergraduate, graduate, and professional.

Derivation

Career functionality alters derivation for the following:

- Primary Program Type
- Program Attempt Status
- Institution Attendance Type

Primary Program Type

When a new program attempt is created or an existing program attempt is modified in a way that potentially switches the primary program, the default primary program type values for each program attempt are determined by Oracle Student System.

An active program attempt is defined as ENROLLED, INACTIVE, LAPSED, or INTERMIT. A program within the same career is defined as being of the same program type.

The following applies to the primary program type derivation:

- primary program type should be PRIMARY if no other active programs exist within the same career
- primary program type of the lowest numeric rank should be PRIMARY if all other active programs of higher numeric rank exist within the same career
- all other active programs within the same career with a higher numeric rank than the PRIMARY primary program type should be SECONDARY

- any active programs within the same carer that have a primary program source

Program Attempt Status

As elements of students’ enrollment change over time, Oracle Student System automatically re-derives the program attempt status.

The derivation must maintain the mapping between the primary and secondary statuses as described in the table below.

Table 8–2 Primary and Secondary Status Relationships

Primary Program Attempt Status	Secondary Program Attempt Status
Unconfirmed	no relationship exists until both programs have been confirmed, which must be done separately
Inactive	also inactive
Enrolled	also enrolled
discontinued	non-primary program becomes the primary program
Intermitted	also intermitted Note: If the student wants to continue studies in non-primary programs, then the primary program must be discontinued.
Lapsed	also lapsed
completed	non-primary program becomes primary. Because all unit attempts exist under the completed program attempt, any units that need to be moved to the new primary program must be moved through program transfer.

Catalogs are derived from the academic calendar year in which the student begins a program attempt or unit set attempt and are stored at the student level.

Institution Attendance Type

Attendance types are derived for each active program. Institution attendance types are derived as follows:

- credits points are summed for all units regardless of programs or career
- standard annual load of key program is determined
- credit points are divided by the standard annual load
- credit points divided by standard annual load is matched

- matched value is the student's overall institution attendance type

Program Transfer

Users perform program transfers to transition a student from a program attempt that is discontinued or completed to a new program. Oracle Student System creates a duplicate of academic credit within the new program attempt.

The following are program transfers that are allowed in Oracle Student System:

- program transfer from a completed program attempt
- enrolled unit attempt transfers are allowed
- advanced standing transfers are allowed

Impact on Other Subsystems

Career functionality impacts the following:

- records and progression
All records totals and progression are measured according to the primary program within each career.
- financial aid
The requirements of financial aid are handled through academic statistics calculations in career. All credit points and GPA calculations are career centric.
- enrollments
National student clearinghouse functionality requires users to report attendance type by student.
- student finance
The fee category and associated rates are determined for each primary program attempt and assessed independently. These charges are combined into a single student charge.

8.2 Program Structure and Planning Profile Options

Set up the following Program Structure and Planning profile options:

- IGS: Call Number for Unit Section
- IGS: Career Model Enabled
- IGS: Generate Curriculum

- IGS: Country Code
- IGS: Indicate whether ID Setting Scheduling Software is Installed

Refer to Appendix A, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

8.3 Government Setup

Unit and program details are included in files submitted to the government.

8.3.1 Setting Up Government Program Types IGSST001

Each institution-defined program type must be mapped to a government program type.

For example, Government program type 10 is mapped to Undergraduate Bachelor's Pass, which could be divided into 10a, Undergraduate Bachelor's--Government Funded, and 10b, Undergraduate Bachelor's--Commercial Operations. An institution might select a local name, such as Shared Program, for the government program code 41 > Cross-institution undergraduate program. This could be given a unique code, such as Shared.

A special program is a program of special interest to the government. Each program version is assigned a special program type.

The following table describes an example of how institution-defined program types can be mapped to government program types.

Table 8–3 Example of Program Types Mapping

Program Type	Description	Government Program Type
10a	Undergraduate Bachelor's > Government Funded	10
10b	Undergraduate Bachelor's > Commercial Operations	10
Shared	Undergraduate Program Shared Between Institutions	41

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Program Types window

Steps

1. Enter data in appropriate fields.

Note: A government program type should be modified only to correct an error in the description.

2. Select Closed to prevent further use of a government program type. A government program type cannot be closed if any of the program types mapped to it are open.

Note: If a government program type is assigned to an institution-defined program type, it cannot be deleted.

3. In the Govt Program Type field, enter the new code.

UK Note: For UK functionality, this will be the DETYA/HESA code.

4. In the Description field, enter the description for the code.

5. Save or save and continue as follows:

File > Save or Save and Proceed

6. Close the window.

8.3.2 Setting Up Government Special Program Types

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Special Program Types > Government Special Program Types window

Steps

- 1. Enter a DETYA/HESA code for the government special program type and its description in the appropriate fields.

Note: A special program type is used to denote programs the enrollment statistics of which are of special interest to the government. A program defined in the Basic Program Details window must belong to a program type and a government special program type.

Note: Once saved only the description of a special program type can be modified.

- 2. Select the Closed check box to prevent further use of a program type.
- 3. Save your work.

8.3.3 Setting Up Government Field of Study IGSST003

Each institution-defined field of study must be mapped to a government field of study. More than one institution-defined field of study can be mapped to the same government field of study.

For example, the government field of study 0101 > Animal Husbandry can be divided into 0101a > Animal Husbandry > Domestic Animals and 0101b > Animal Husbandry > Exotic Animals by the institution.

The following table shows how these fields of study are mapped to government fields of study

Table 8–4 Government Fields of Study Mapping

Institution-Defined Field of Study Code	Description	Government Field of Study
0101a	Animal Husbandry > Domestic Animals	0101 > Animal Husbandry
0101b	Animal Husbandry > Exotic Animals	0101 > Animal Husbandry

UK Note: For UK functionary, you must define the government fields of study and field of study codes that apply to HESA and UCAS.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Fields Of Study window

Step

Enter data in each field of the window as described in the table. Save your work.

Guidelines

A government field of study should be modified only to correct an incorrectly entered description. A new government field of study is created.

If a government field of study is assigned to an institution-defined field of study, it cannot be deleted. To close a government field of study and prevent any further use, select the Closed check box.

A government field of study cannot be closed if any fields of study mapped to it are open.

8.3.4 Setting Up Government Funding Sources IGSST006

Each institution-defined funding source entered in the Funding Sources window must be mapped to a government funding source. A government funding source is not a Required reporting element and can therefore be used for institution purposes.

The following table describes examples of possible institution-defined funding sources.

Table 8–5 Funding Sources Examples

Funding Source	Description	Government Funding Source
A	federally-funded	W
B	state-funded	X

Table 8–5 Funding Sources Examples

Funding Source	Description	Government Funding Source
C	fee-paying postgraduate	Y
D	fee-paying overseas	Z

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Funding Sources window

Steps

1. In the Government Funding Source field, enter the new government funding source code.
2. In the Description field, enter the description of the funding source.
3. Save or save and continue as follows:
File > Save or Save and Proceed
4. Close the window.

Guidelines

A government funding source code should be modified only to correct an incorrectly entered description. A new government funding source code should be created.

If a government funding source is assigned to a program or used elsewhere in the system, it cannot be deleted. To close a government funding source and prevent any further use, select the Closed check box.

A government funding source cannot be closed if any funding sources mapped to it are open.

8.3.5 Mapping to Government Discipline Groups IGSST007

Each institution-defined discipline group must be mapped to a government discipline group. Government discipline groups have unique codes to group units of study into like disciplines within branches of learning. More than one institution-defined discipline group can be mapped to the same government discipline group. A government discipline group assigned to an institution-defined discipline cannot be deleted.

The following table describes how the government discipline group code, 0605 > Music, can be subdivided for institution purposes.

Table 8–6 Government Discipline Group Example

Discipline Group	Description	Government Discipline Group
MCLA	Music-Classical Performance	0605
MCON	Music-Contemporary Performance	0605
JAZZ	Music-Jazz	0605
CONT	Music-Contemporary	0605

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Discipline Groups window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–7 Discipline Groups Window Description

Field Name	Type	Features	Description
Government Discipline Group	Required		Government discipline group code

Table 8–7 Discipline Groups Window Description

Field Name	Type	Features	Description
Description	Required		Government discipline group description
Closed	Optional	Check box	If selected, prevents further use of government discipline group
Disciplines		Button	Opens the Disciplines window to associate institution-defined disciplines to government disciplines

8.3.6 Setting Up Government Attendance Types IGSST010

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Program Attendance Types > Government Program Attendance Types window

Steps

1. Enter the government-defined DETYA code for an attendance type for a program and its description. Examples of attendance types could be full time, part time, more than part time but not full time, or once a term.
2. Save your work.
3. Select the Closed check box to prevent further use of a government-defined attendance type.

Note: Only government attendance types that are not mapped to an institution-defined program attendance type and in current use, can be closed.
4. Save your work.
5. Query a saved government program attendance type and click **Attendance Type** to view the institution-defined program attendance types mapped to the selected government attendance type.

Note: More than one attendance type may be mapped to a government attendance type. Government program attendance types once saved, their descriptions can be modified.

8.3.7 Setting Up Government Program Attendance Modes IGSST011

Each institution-defined attendance mode must be mapped to a government attendance mode. More than one institution-defined attendance mode can be mapped to the same government attendance mode.

The following table lists examples of attendance modes.

Table 8–8 Attendance Modes

Attendance Mode	Description
Internal	Attendance at institution is required on regular basis; for higher degree programs in which regular attendance is not required, attendance is scheduled for supervision and instruction
External	Attendance at institution is not required or is on irregular basis and instructional materials are delivered to student
Multimodal	At least one unit of study is internal and at least one is external

An institution can use its own names for internal and external students, such as On Campus and Off Campus, with the codes On and Off. These codes are mapped to the government attendance modes, internal and external. Similarly, multimodal can be identified as Mixed Attendance, Mixed.

The following table describes how institution-defined attendance modes can be mapped to government attendance modes.

Table 8–9 Program Attendance Modes Example

Program Attendance Mode	Description	Government Program Attendance Mode
On	On Campus	1
Off	Off Campus	2
Mixed	Mixed Attendance	3

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Program Attendance Modes window

Steps

1. Click **Attendance Mode**. In the Government Attendance Mode field, enter the code for the institution attendance mode.

UK Note: For UK functionality, enter the DETYA/HESA code.

2. In the Description field, enter an appropriate description.
3. Save or save and continue as follows:

File > Save or Save and Proceed

4. Close the window.

Guidelines

A government program attendance mode should be modified only to correct an incorrect description.

If a government attendance mode is assigned to an institution-defined attendance mode, it cannot be deleted. A government attendance mode can be closed to prevent any further use by selecting Closed.

8.4 HESA Reference Data

Program related data required for reporting to HESA and not captured in Student System is manually entered in the UK Statistics window. Data must be recorded for the program for a valid student or combined HESA return to be generated.

Define Oracle Student System HESA Field Codes

In Oracle Student System there are additional fields that apply specifically to HESA reporting in the UK Statistics and HESA Detail windows. Each field is coded using an institution-defined Oracle Student System code, mapped to the appropriate HESA code by the extraction process.

The Maintain Codes window maintains the Oracle Student System reference codes used in the UK Statistics, Program Offering, and Program Offering Options HESA Details windows.

The following table identifies each of the code sets for which code values must be defined.

Table 8–10 HESA Field Codes

Code	Description
OSS_CRDTSCM	OSS credit transfer scheme values
OSS_FEPRMK	OSS FE Program Marker
OSS_COSTCN	OSS cost centres
OSS_LOCSDY	OSS location of study
OSS_UFI_PLACE	OSS University For Industry
OSS_TYPEYR	OSS year type or program year
OSS_MODE_TYPE	OSS Mode of Study
OSS_FEEBAND	OSS fee band values
OSS_NHS_FUSRC	OSS NHS Funding Source
OSS_FRAN_ACT	OSS Franchising Activity

The following table identifies each of the code sets for which code values must be defined for institutions in England.

Table 8–11 HESA Field Codes for England

Code	Description
OSS_FUNDLEV	OSS funding level

The following table identifies each of the code sets for which code values must be defined for institutions in Northern Ireland.

Table 8–12 HESA Field Codes for Northern Ireland

Code	Description
OSS_FUNDLEV	OSS funding level

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for all institutions.

Table 8–13 Teacher Training Program Codes for All

Code	Description
OSS_TTCID	OSS Teacher Training Course Identifier

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for England.

Table 8–14 Teacher Training Program Codes England

Code	Description
OSS_ITTPHSC	OSS ITT phase/scope

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Wales.

Table 8–15 Teacher Training Program Codes Wales

Code	Description
OSS_ITTPHSC	OSS ITT phase/scope
OSS_BITTM	OSS bilingual ITT marker values

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Scotland.

Teacher Training Program Codes Scotland

Code	Description
OSS_BITTM	OSS bilingual ITT marker values
OSS_TQSEC	OSS teaching qualification sought/gained sector
OSS_TQSUB123	OSS teaching qualification sought/gained subject values

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Northern Irish

Table 8–16 Teacher Training Program Codes Northern Irish

Code	Description
OSS_BITTM	OSS bilingual ITT marker values
OSS_TQSEC	OSS teaching qualification sought/gained sector

See Define HESA Reference Codes in Chapter 22, "HESA" for information about using the Maintain Codes window.

8.5 Faculty Management

Faculty functionality enables users to monitor faculty workload, teaching assignments, teaching assignment conflicts, and non-teaching workload assignments.

Create and Assign Faculty Task Types

The Faculty Task Type window enables administrative users to create and assign faculty task types for major faculty tasks to a department's budget. A task is any faculty workload other than teaching responsibility. Users also assign a default workload amount to faculty task types in this window.

Create Codes for Multiple Academic Degrees

The Degree Codes window enables users to create codes for multiple academic degrees.

8.5.1 Setting Up Expected Workload IGSPS126

Users can set the expected workload only once. These expected workload applies to all faculty and staff members and the expected workload is setup for either a term calendar or an academic year. If an institution sets up the expected workload for a term calendar, it cannot set an expected workload for an academic year as well.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Faculty > Expected Workload > Expected Workload window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–17 *Expected Workload Window Description*

Field Name	Type	Features	Description
Calendar Category	Required	List of values	Categorization of calendar types; for example, load calendar, academic calendar
Expected Workload	Required		Minimum expected workload attached to a calendar category

8.5.2 Setting Up Faculty Tasks IGSPS127

Users can assign different types of tasks to the faculty apart from academic. For example, he can be assigned the task of a department chairman or a field trip supervisor. The Faculty Task Types window enables users to create task types and assign to capture faculty workload for tasks other than teaching responsibility.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Faculty > Faculty Task Types > Faculty Task Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–18 Faculty Task Types Window Description

Field Name	Type	Features	Description
Task Type	Required		Faculty task type
Description	Required		Description of faculty task type
Department Budget Code	Optional		Department budget code to which task type is assigned
Default Workload	Required		Default workload assigned to a task type

8.5.3 Setting Up Expected Workload Override Reason IGSPS128

Users can override the workload assigned to a faculty. The Expected Workload Override Reasons window enables users to create reasons for overriding expected workload of a faculty.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Faculty > Expected Workload Override Reasons > Expected Workload Override Reasons window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–19 Expected Workload Override Reasons Window Description

Field Name	Type	Features	Description
Override Reason	Required		Name of override reason
Description	Required		Override reason description
Closed	Optional	Check box	If selected, prevents further use of override reason

8.5.4 Setting Up Degree Codes IGSPS093

Use this procedure to create degree detail codes and to record and query specific codes and descriptions for academic degree types, disciplines, and units, and record them for faculty members.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Faculty > Degree Codes > Degree Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–20 Degree Codes Window Description

Field Name	Type	Features	Description
Degree Code	Required		User-defined code for academic degree types
Description	Required		User-defined description of code for academic degree type
Closed	Optional	Check box	If selected, prevents further use of degree code

8.6 Program

Program setup includes setting up the institution’s program data as well as mapping this data to government codes. Awards for achievement are also set up in Program. The Program windows enable users to create many institution-defined elements necessary for use in Student System. Users must set up these elements before they can use them in other subsystems of Student System.

The program elements defined and maintained by the Program windows include the following:

- stages of development
- versions
- attributes

- offerings
- rules
- history

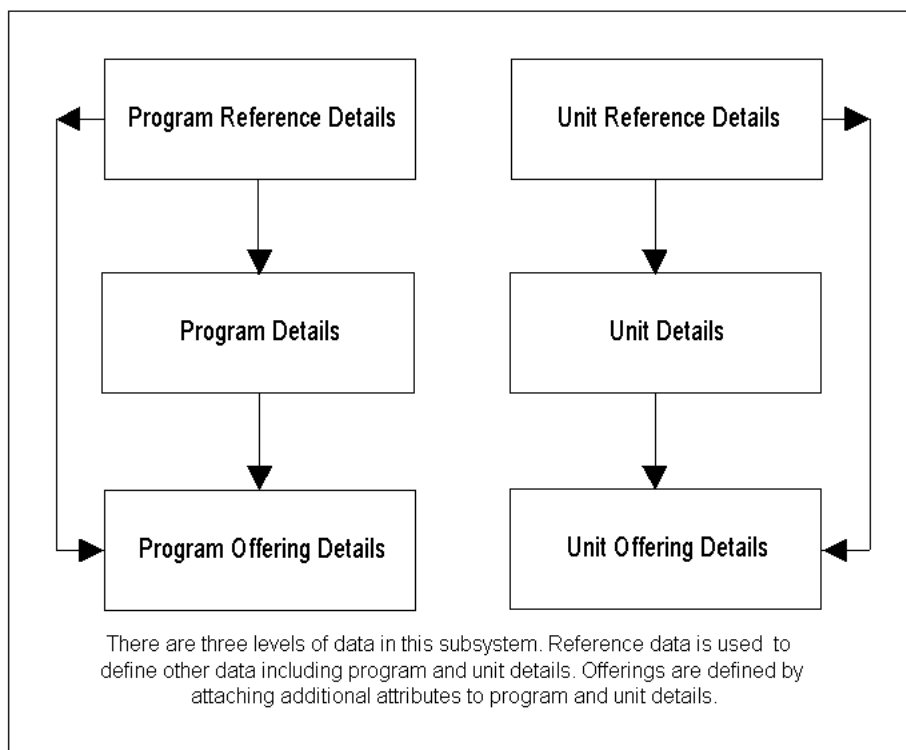
User Tasks

Most information entered in the Program Structure and Planning subsystem is reference data. The ability to add, modify, and delete this data is restricted to subsystem specialists and system administrators.

Users have the option to provide read-only access to this subsystem. They can also use program and unit details in other subsystems or through special inquiry or reporting interfaces. For example, program and unit details are used extensively in the Admissions, Enrollment, and Assessment subsystems.

Relationships Between Main Data Groups

Figure 8–2 shows the relationships between the main data groups in the Program Structure and Planning subsystem, and the types of data needed to define programs and units, and specify the program and unit offering instances in which students are enrolled.

Figure 8–2 Relationships Between Main Data Groups

Reference data defines programs and units. For example, a program status is required to define a program. The permissible set of program statuses is maintained separately, as reference data. Reference data remains relatively static over time.

Individual program and unit details, however, are defined by their combinations of attributes, including those defined as reference data.

The following sections describe the relationships between data elements, and how they combine to create program and unit offerings:

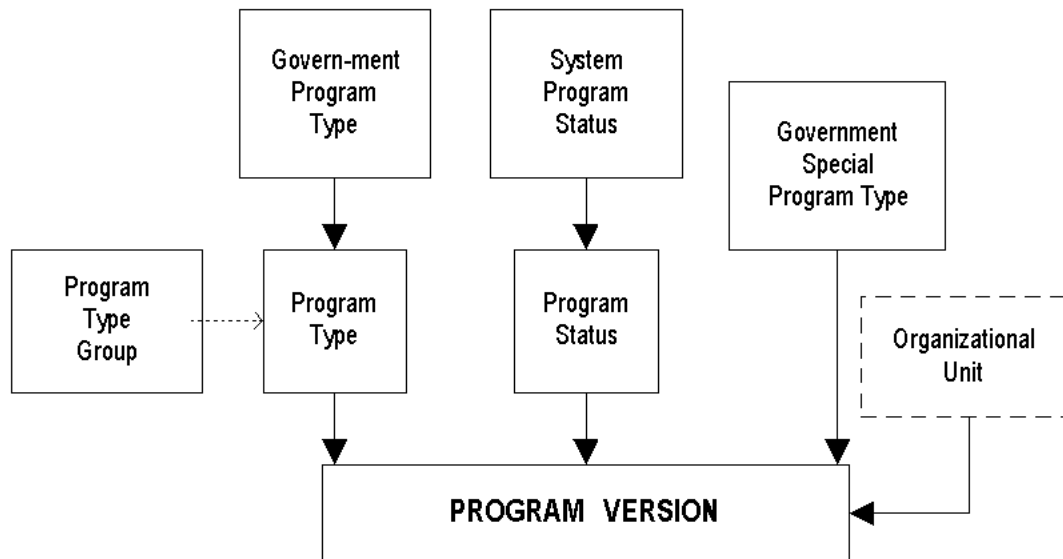
- Relationships Required to Define Program Versions

- Relationships Between Program Details
- Relationships Between Program Versions and Offerings
- Relationships Related to Note Functionality

Relationships Required to Define Program Versions

Figure 8–3 shows how reference data combines to define program versions.

Figure 8–3 Relationships Required to Define Program Versions



Arrows indicate a dependency. For example, Program Type Group is an attribute of Program Type. Dotted lines indicate an optional relationship.

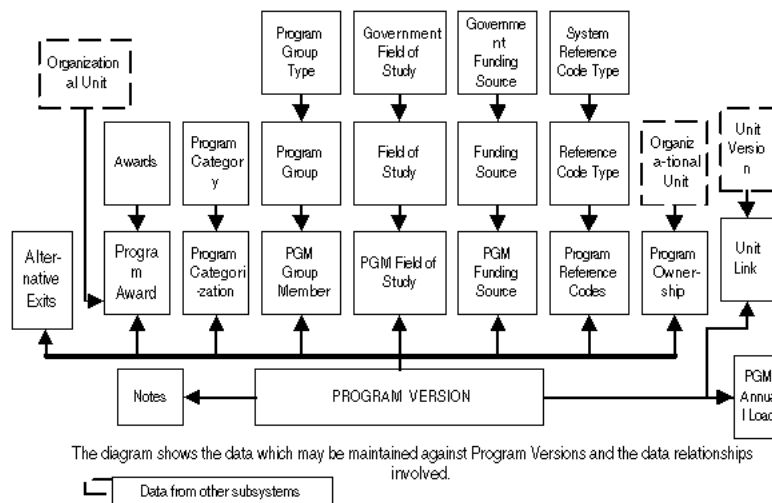
□ □ □ Data from other subsystems

To define a program version, a program type, program status, government special program type, and organizational unit must be defined. Similarly, to define a program status, a system program status must be assigned to it. A program type must be assigned a government program type but a program type group is optional.

Relationships Between Program Details

Figure 8–4 shows the details that can be maintained for a program version, once it is defined.

Figure 8–4 Relationships Between Program Details

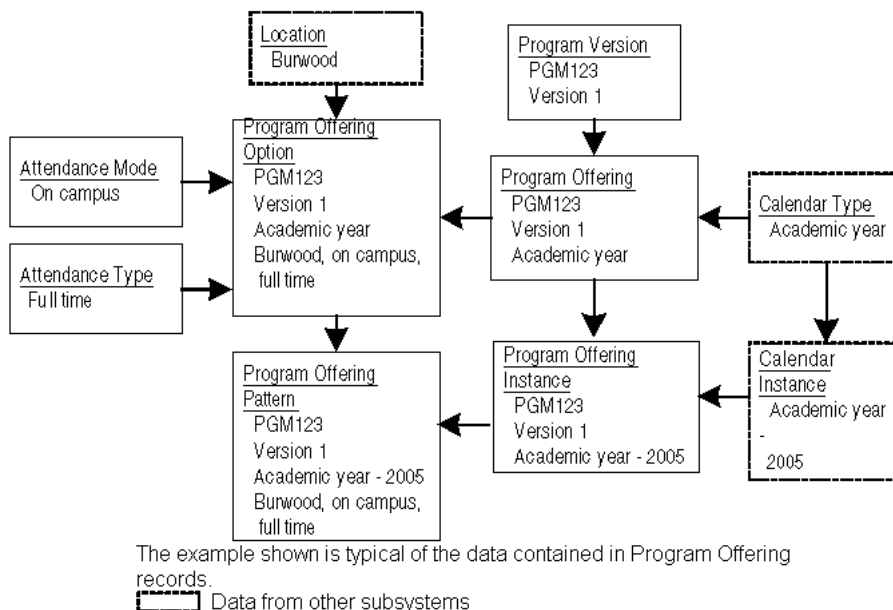


Note: Many of the attributes of a program version are defined by other data maintained as reference data. For example, a program version can be assigned a program field of study. The field of study must be maintained as reference data and depends on the existence of an appropriate government field of study.

Relationships Between Program Versions and Offerings

Some of the elements must be provided in order to change the status of the program from Planned to Active. These elements are: Program Awards, Program Field of Study, and Program Ownership.

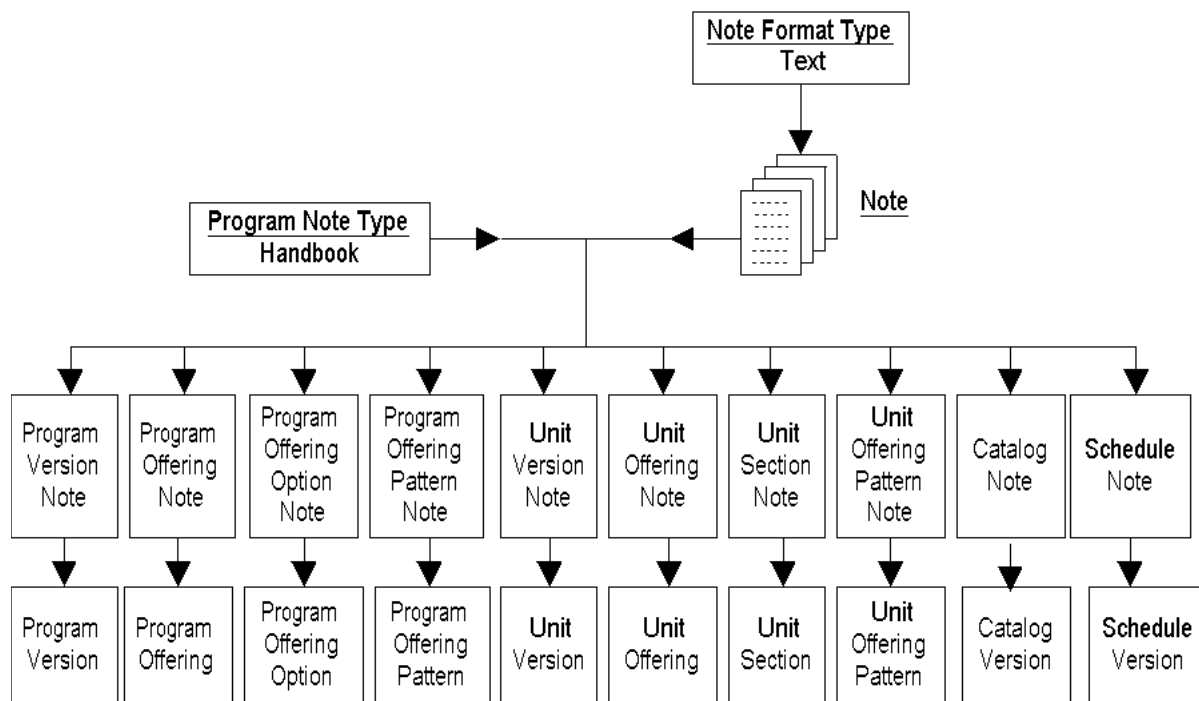
Figure 8–5 shows the relationship between program versions and their offerings, offering options, and offering patterns. Typical data is included to show how a particular set of records is constructed.

Figure 8–5 Relationships Between Program Versions and Offerings

Students enroll in a particular program offering pattern of a program. A unique program offering pattern is created by combining information related to a specific program version with information describing when, as indicated by calendar, where, as indicated by location, and how, as indicated by attendance type and mode, the program is offered.

Relationships Related to Note Functionality

Figure 8–6 shows the windows against which notes can be stored.

Figure 8–6 Relationships Related to Note Functionality

A note can be stored against records in any of the subsystem functions shown. Program Note Type specifies the use or purpose of the note. Note Format Type specifies that the note is text.

Note functionality enables additional information to be attached to certain data. The note type attribute enables notes to be grouped according to a common characteristic. Notes of many types can be created, each type reflecting the purpose of notes associated with it.

Notes can be created, stored, and retrieved in text format.

Note: The level in a subsystem where different notes are attached depends on institution policy. Within the Program Structure and Planning subsystem, notes can be attached to data at the following levels:

- program version
- program offering

- program offering option
- program offering pattern
- unit version
- unit offering
- unit offering option
- unit offering pattern
- catalog version
- schedule version
- unit section note

Program and Unit Rollover

To reduce the work involved in maintaining curriculum and associated data, the system provides rollover functionality by which existing program and unit information can be used to create the following new information:

- new programs and program versions based on existing program versions
- new units and unit versions based on existing unit versions
- new unit offering patterns, unit offering pattern waitlists, and unit sections based on existing unit offering patterns, unit offering pattern waitlists, and unit sections
- program offering instances and patterns in a new academic period based on program offering instances and patterns of a former academic period. If required, a particular organizational unit can also be rolled over.
- program offering instances and patterns in a new teaching period based on unit offering options and patterns of a former teaching period. If required, a particular organizational unit can also be rolled over.

8.6.1 Setting Up Program Type Groups IGSPS002

Prerequisites

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Type Groups window

Steps

1. In Oracle Student System, navigate to the Program Type Groups window as follows:

Program Structure and Planning > Program > Program Type Groups

2. Enter data in appropriate fields.

Note: If a program type group is used in the definition of a program type, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

Note: If a program type group is used in the definition of a program type, only the description can be modified. It is preferable to create a new program type group if the changes in the description are substantial.

3. In the Program Type Group Code field, enter the name or Code of the program type group.
4. In the Description field, enter a Description of the program type group.
5. To attach a program type to a program type group, click Program Types.
6. Save or save and continue as follows:

File > Save or Save and Proceed

7. Close the window.

8.6.2 Setting Up Program Types IGSPS001

Program types are comparable to government program types, but they also permit more detailed classification levels and the use of program type names specific to individual institutions and provide for groupings of these program types to meet the specific needs of the institution. A program type can be assigned to membership in a program type group for future inquiry, reporting, and manipulation of programs by group.

In the Program Type window, the newly created Finance Aid Program Type field is defaulted to Bachelors. You must change this to match the correct program type.

Prerequisites

Program Type Groups IGSPS002

Enrollment Categories IGSEN009
 Government Program Types IGSST001

Responsibility
 Oracle Student System Super User

Navigation
 Program Structure and Planning > Program > Program Types > Program Types window

Steps
 Enter data in the appropriate fields of the window as described in the table. Save your work.

Table 8–21 Program Types Window Description

Field Name	Type	Features	Description
Program Type	Required		<p>Program type name or code</p> <p>Note: A program type used in the definition of a program cannot be deleted and only the description can be modified. Modification is not recommended unless the change in description is minor and does not affect the meaning of the program type.</p> <p>Note: At least one institution-defined program type must be created to correspond to each government program type. More than one institution-defined program type can be mapped to the same government program type.</p>
Description	Required		Program description
Enrollment Category	Required	List of values	<p>Institution-defined classification of students with similar enrollment characteristics</p> <p>Note: This enrollment category applies to students who did not come from the admission process.</p>
Government Program Type	Required	List of values	Government-defined classification of higher education programs
Closed	Optional	Check box	If selected, prevents further use of the program type
Program Type Group Code	Optional	List of values	Program type group code

Table 8–21 Program Types Window Description

Field Name	Type	Features	Description
Financial Aid Program Type	Required if the profile option for Financial Aid has been set to Yes	List of values	Valid values include Bachelor, Pre-Bachelor, and Professional
Government Program Level	Optional		Government program level
Award Program	Optional	Check box	Selected by Default; if deselected, indicates that the program type applies to nonaward programs
Research Type	Optional	Check box	If selected, indicates that the program is one for which candidacy details are to be collected as part of the admission and enrollment processes
Class Standing Schedule		Button	Opens the Class Standing Schedule window
Progression Rule		Button	Opens the Progression Rule Applications window

8.6.3 Setting Up Program Categories IGSPS003

Previously created categories can be assigned to a program version for the purpose of grouping program versions.

Program categories can be used for specific purposes within the Statistics subsystem.

Fields in the Program Categorizations region of the Program Categorizations window are protected from modification. To modify program categorizations, add and delete program categories.

Undergraduate, Non-Award, and Corporate are examples of program categories.

Maintaining Program Categories

The program categories procedure creates, deletes, and modifies institution-defined program categories in the Program Category region of the Program Categories window. A diverse set of programs, with attributes that cannot be easily selected, can be categorized for inquiry, reporting, and manipulation of programs by category.

For example, all programs of the institution that include the study of Chinese language can be grouped for the purpose of managing students' academic progression in an institution-defined program category CL > Chinese Language.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Categories > Program Categories window

Steps

1. In the Program Category field, enter the name of the program category. If a program category is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed Check box. Also, If a program category is used in the definition of a program, only the description can be modified. It is preferable to create a new program category if the changes in the description are substantial.
2. In the Description field, enter a description of the program category.
3. In the Program Code field of the Program Categorizations region, select the program version number from the List of values or enter a new program code.
If a program code is already active, the List of values appears.
4. Save your work.

8.6.4 Setting Up Fields of Study IGSPS004

Institution-defined fields of study, covering the programs offered by the institution, are comparable to government fields of study, but they allow greater flexibility by permitting classification at a more detailed level and the use of field of study names specific to the institution.

Prerequisites

Government Fields of Study IGSST003

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Fields of Study window

Steps

Enter data in the appropriate fields of the window as described in the table. Save your work.

UK Note: The government field of study codes should be defined as the HESA subject codes.

Table 8–22 *Fields of Study Window Description*

Field Name	Type	Features	Description
Field of Study	Required		institution-defined field of study name
Description	Required		field of study description
Government Field of Study	Required	List of values	government field of study
Closed		Check box	If selected, prevents further use of field of study

8.6.5 Setting Up Program Attendance Modes IGSPS005

Program attendance modes are comparable to government attendance modes, but they provide for greater flexibility by permitting classification at a more detailed level and the use of attendance mode names specific to the institution.

Program attendance modes cannot be deleted.

Prerequisites

Government Program Attendance Mode IGSST011

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Attendance Modes window

Steps

1. Enter data in appropriate fields.

The following information applies to this step:

If a program attendance mode is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

If a program attendance mode is used in the definition of a program, only the description can be modified. It is preferable to create a new program attendance mode if the changes in the description are substantial.

A program attendance mode can be closed to prevent further use by selecting the Closed check box.

2. In the Attendance Mode field, enter the name or code of the program attendance mode.
3. In the Description field, enter a description of the program attendance mode.
4. In the Government Attendance Mode field, enter a government program attendance mode from the List of values.
5. Save your work.

8.6.6 Setting Up Program Attendance Type IGSPS006

A program attendance type is comparable to a government attendance type but provides for greater flexibility by permitting classification at a more detailed level and using attendance type names specific to the institution.

Typical attendance types are full-time and part-time.

Attendance types are used in the definition of program offering options and for institution administrative purposes such as calculation of fees and charges.

In the Attendance Type region of the Program Attendance Types window, the acceptable per annum Effective Full-Time Student Units (EFTSU) range necessary to meet the definition of each attendance type is entered. This is used to calculate the attendance type and load of students for government statistical returns and for some fees. It is the total of a student's current program attempts across all enrolled teaching periods that is calculated against the load ranges entered. For multiperiod enrollments, the calculation uses the relevant apportionment factor.

A research percentage is also entered against an attendance type. This percentage is used as the default attendance percentage value for a research candidacy in a program with that attendance type.

In the Attendance Type Load region of the Program Attendance Types window, the load ranges required to meet the definition of each attendance type within the period of specific load calendars are entered. These load ranges are used to calculate

the attendance type of students for institution purposes, such as calculation of service fees and to ensure that a student's enrollment conforms to the program attendance type where a student is forced or required to undertake a program with a particular attendance type. A student's program attempt attendance type is validated against the load ranges entered. A default EFTSU value is entered for each attendance type within the specified load calendar period. This default EFTSU value must exist for calculation of some fees using the predictive fee assessment process.

For example, institutions can further subdivide the government attendance types 1 > full-time and 2 > part-time to facilitate local operations. Institutions can also use locally recognized codes to describe full-time or part-time load, such as FT and PT. In either case, each institution-defined attendance type must map to a corresponding government attendance type.

The load range for a year in EFTSU, which defines each attendance type, is entered as the academic period load range. For government reporting purposes, a student's unit load is calculated across all program attempts, and the student is deemed to be of a particular program attendance type if the student's load falls within the load range of the attendance type.

Program attendance types cannot be deleted.

Attendance Type Load

Because a student's attendance type can be assessed in periods less than a full year for enrollment, validation, service fees, and travel concessions, it is necessary to be able to define the standard load range that constitutes each attendance type in each of the shorter periods. The student's calculated unit load can then be compared to the load ranges defined for an attendance type for the periods defined by specific load calendars.

For example, full-time study at an institution can equate to a load of 0.75 EFTSU or more in a year. The institution can determine its students' attendance types for each semester. The institution can determine that a load between 0.375 and 9.999 EFTSU constitutes a full-time load in each of semester 1 and semester 2. Therefore, a student can be classified as full-time for the year with a load of 0.75 EFTSU, but part-time for semester 1 and full-time for semester 2 with loads for each of these periods of 0.25 and 0.5 EFTSU, respectively.

Prerequisites

Government Program Attendance Type IGSST010

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Attendance Types > Program Attendance Types window.

Steps

1. Enter data in appropriate fields. If an attendance type is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed Check box. If an attendance type is used in the definition of a program, only the description can be modified. It is preferable to create a new program category if the changes in the description are substantial. An attendance type can be closed to prevent further use by selecting the Closed Check box.
2. In the Attendance Type field, enter the name of the attendance type.
3. In the Description field, enter a description of the attendance type.
4. In the Government Attendance Type field, select the appropriate government attendance type from the List of values.
5. In the Lower Load Limit field, enter the lower load limit representing the acceptable per annum EFTSU range necessary to meet the definition of the selected attendance type.
6. In the Upper Load Limit field, enter the upper load limit representing the acceptable per annum EFTSU range necessary to meet the definition of the selected attendance type.
7. In the Research% field, enter the research percentage representing the default attendance percentage for a research student in a program of the selected attendance type.
8. Save your work.
9. In the Calendar Type field, select the appropriate load calendar from the List of values or enter a valid value.
10. In the Lower Enroll Load Range field, enter the EFTSU range that defines the attendance type for the selected load calendar.
11. In the Upper Enroll Load Range field, enter the EFTSU range that defines the attendance type for the selected load calendar.

12. In the Default Equivalent Full Time Student Unit field, enter the default EFTSU applicable to the selected attendance type.

13. Save your work.

Guidelines:

The load limit ranges for two open attendance types cannot overlap.

There must be no gaps in the academic period load ranges, which means that the full possible load range must be covered by the attendance types.

Changes within the Program Attendance Types window affect the calculation of a student's derived program attendance type.

The enroll load ranges for two open attendance types specified for a specific load calendar cannot overlap.

There must be no gaps in the enroll load ranges for a specific load calendar, which means that the full possible load range must be covered by the attendance types.

A default EFTSU value must exist for the processing of predictive fee assessment for the selected attendance type.

Once in use, load range data must not be deleted or modified. A major change in teaching calendar or load calendar structure requires the creation of new calendars and new load apportionment.

8.6.7 Setting Up Program Group Types IGSPS007

The program group types procedure maintains the set of institution-defined program group types. Programs can be gathered into ad hoc groups for specific purposes. Each program group is identified by a unique code. Program group types classify program groups according to the purpose of the grouping. Each program group must be mapped to a program group type. Every program group type must be mapped to a system program group type that is recognized by the system for other functionality.

The following information applies to this procedure:

- A program group type cannot be added against a closed system program group type.
- A program group type cannot be reopened if it is mapped to a Closed system program group type.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Group Types window

Steps

1. Enter data in appropriate fields.

Note: If a program group type is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

Note: If a program group type is used in the definition of a program, only the description can be modified. It is preferable to create a new program group type if the changes in the description are substantial.

A program group type can be closed to prevent further use by selecting Closed.

2. In the Program Group Type field, enter the name or code of the program group type.
3. In the Description field, enter a Description of the program group type.
4. In the System Program Group Type field, select the appropriate system program group type from the List of values.
5. Save or save and continue as follows:
File > Save or Save and Proceed
6. Close the window.

8.6.8 Setting Up Awards IGSPS008

Students receive awards for satisfying the completion requirements of their programs.

The creation and definition of awards is the result of rigorous consideration by institutions. The maintenance of a record of all awards, which are approved through a due process, demands that an award must not be deleted once it is properly created.

The following topics are described in this section:

- Award Types
- Awards and Program Versions

Award Types

The system award type indicates to the system if the award is a program award, honorary award, or special award, such as a medal or prize. Awards can be assigned to program versions using the system award type Program in the Program Awards window and are ultimately applied to diplomas, academic transcripts, and graduation processes.

Creating an award with the system award type Honorary permits its assignment to new graduand records in the Graduand Details window and its ultimate application to diplomas and other graduation processes.

Students receive awards representing a medal or prize. Creating an award mapped to either the system award type Medal or Prize permits its use in student program attempt special award records in the Special Awards window.

For example, Bachelor of Commerce, Bachelor of Arts in Education with Honors, and Master of Education are examples of awards assigned to program versions. The award code for each award can be alpha, numeric, or both alpha and numeric.

Awards and Program Versions

The link between an award and a program version is maintained using the Program Awards window.

For example, if Bachelor of Commerce is selected in the Award region of the Awards window, all programs associated with Bachelor of Commerce are displayed. Students successfully completing one of these programs are awarded a Bachelor of Commerce degree.

Awards cannot be deleted. You must close Awards if you do not want that award to be used.

UK Note: Use this procedure to define institution exit awards and entry qualifications such as A and AS levels.

Exit awards should have system award type of Program. Entry qualifications should have a system award type of entry qualification and a grading schema. If an award can be an exit award and an entry qualification, it should have a system award type of Program.

Prerequisites

Locations IGSOR032

Credential Types IGSGR004

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Awards window

Steps

To create awards, perform the following steps.

1. To create awards, enter data in each field of the window as described in the table.
2. Save your work.

Table 8–23 Awards Window Description

Field Name	Type	Features	Description
Award Code	Required		Award code
Awards Title	Required		Award title
System Awards Type	Required	List of values	System award type
Credential Type	Optional	List of values	Credential type associated with the award
[Description]	Display only		Credential type description
Closed	Optional	Check box	If selected, prevents further use of credential type
Grading Schema	Optional	List of values	Grading schema associated with the award
[Version Number]	Display only		Grading schema version
[Description]	Display only		Grading schema description
Notes	Optional		Awards-related information
Program Award Query		Button	Opens Program Award Inquiry window

8.6.9 Setting Up Program Statuses IGSPS009

Program status classifies the state of activity of program versions, such as whether program versions are active or inactive. Program status is comparable to system program status but provides for greater flexibility by permitting classification at a more detailed level and the use of nomenclature familiar to the institution.

The following table describes a typical institution that currently uses and does not wish to change the term Current for a program that is active, Planned for a program that is in the planning process, and the terms Expired and Closed for programs that are no longer active but must remain unchanged for different reasons. These institution statuses can be mapped to system program statuses, which are recognized by the system for other functionality, as shown in the following table.

The following table describes how institution statuses can be mapped to system program statuses.

Table 8–24 Program Statuses Mapping Example

Institution-Defined Program Status	Description	System Program Status
Current	Currently able to enroll	Active
Planned	Planned for future use	Planned
Expired	End of a predetermined period of availability and cannot be enrolled in pending review	Inactive
Closed	No longer offered to students	Inactive

The following table describes program statuses.

Table 8–25 Program Statuses

Program Status	Description
Active	Students can enroll in program Can be changed only to Inactive Only one version of active program and unset expiration date can exist; before changing status of new program version to Active, status of existing program version must be changed to Inactive or expiration date must be entered
Inactive	Students cannot enroll in program Can be changed only to Active System does not check for closed reference data when changing Inactive to Active Program status can be changed to Inactive only when end date is entered Details of inactive program version cannot be modified
Pending	Program needs to be approved and have its status changed to Planned or Active before students can enroll

Table 8–25 Program Statuses

Program Status	Description
Planned	<p>Students can enroll in program in future</p> <p>New programs must be Planned</p> <p>Can be changed only to Active or Inactive</p> <p>When status is changed from Planned to Active, system checks related program offerings and displays warning if closed or missing reference data is found; correct data must be entered before status becomes Active, or new version must be created</p> <p>The elements are: Program Awards, Program Ownerships and Program Field of Study.</p>

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Statuses window

Steps

1. Enter data in appropriate fields.

Note: If a program status is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

Note: If a program status is used in the definition of a program, only the description can be modified. It is preferable to create a new program status if the changes in the description are substantial.

2. Select Closed to prevent further use of a program status.
3. In the Program Status field, enter the name or Code of the program status.
4. In the Description field, enter a Description of the program status.
5. In the System Program Status field, select the appropriate system program status from the drop-down list.
6. Save or save and continue as follows:

File > Save or Save and Proceed

7. Close the window.

8.6.10 Setting Up Funding Sources IGSPS010

A funding source is a means of classifying programs according to the primary source or sources of funding for a program.

Funding sources can be assigned to program versions using the Restricted Funding Sources window to identify the funding source of each student program enrollment.

Universities are required by the government to report statistics about programs they offer and enrollments in these programs, including government funding sources.

Funding sources cannot be deleted.

Note: A funding source cannot be mapped to a Closed Government funding source.

UK Note: Government funding source should be defined as the HESA major source of funding codes MSFUND.

Prerequisites

Government Funding Sources IGSSST006

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Funding Sources > Funding Sources window

Steps

1. Enter data in appropriate fields.

The following information applies to this step:

If a funding source is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

A Closed funding source cannot be reopened if it is mapped to a government funding source that is closed.

If a funding source is used in the definition of a program, only the description can be modified. It is preferable to create a new funding source if the changes in the description are substantial.

A funding source can be closed to prevent further use by selecting the Closed check box.

- 2. In the Funding Source field, enter the name of the new funding source.
- 3. In the Description field, enter a description for the funding source.
- 4. In the Government Funding Source field, select the appropriate government funding source from the List of values.
- 5. Save your work.

8.6.11 Setting Up Reference Code Types IGSPS011

In Oracle Student System, reference information can be created and maintained by performing the following tasks:

- defining reference code types and associated reference codes
- defining the applicable levels for these reference code types and reference codes
- associating specific reference code types and reference codes with specific programs, program offering options, units, unit sections, and unit section occurrences.

Reference code types classify reference codes into families or clusters of codes. Institution-defined reference code types must be assigned to system reference code types.

The following table describes system reference code types.

Table 8–26 System Reference Code Types

System Reference Code Type	Description
IVR	Interactive voice response; code for telephone inquiries and data entry related to program and unit enrollments, variations, and assessment results
CRSOFSTUDY	Code attached to program versions that lead to undergraduate award, used for statistical reporting to government It is also used for capturing institutional notes about the program.

Table 8–26 System Reference Code Types

System Reference Code Type	Description
CRICOS	Code in Commonwealth Register of Institutions & Programs for Overseas Students This code is used for Australian government reporting only.
TAC-FEE	Code Tertiary Admissions Center uses for admission to tuition paying program This code is used for Australian government reporting only.
TAC-HECS	Code Tertiary Admissions Center uses for admission to HECS paying program This code is used for Australian government reporting only.

Program reference codes can also be entered to identify a program version for other specific purposes. Each program version in Student System is identified by its unique combination of program code and version number. This feature is particularly useful for entering codes used by other systems to identify a program version.

Each reference code assigned to a program version must be assigned a reference code type, which is maintained in the Reference Code Types window. Reference code types are mapped to system reference code types that are recognized by the system for specific functions. The mandatory reference types cannot be deleted or modified. Reference codes can be modified for the mandatory reference types.

reference code are created. These mandatory reference types cannot be deleted or updated. The reference codes can be modified if Required.

The following information applies to this procedure:

- A reference code type cannot be mapped to a closed system reference type.

UK Note: The following program reference codes should be defined:

- Reference code type, Description
- VOCATIONAL, Vocational level
- REGBODY, Regulatory body

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Reference Code Types window

Steps

1. Enter an institution-defined code in the Reference Code Type field and an associated description in the Description field.

Note: If changes in the description are substantial, a new reference code type should be created.
2. Select Closed to prevent further use of a record. A closed reference code type cannot be reopened if it is mapped to a closed system reference code type.
3. Select Used in Self-Service if the reference code type is to display in self-service windows.
4. Select a system reference code type.
5. In the Applicable Levels region, select the levels to which the reference code type applies.
6. Enter at least one institution-defined code in the Reference Codes region. An unlimited number of reference codes may be entered for each reference code type. If multiple reference codes are entered, one must be selected as the default by checking the Default check box. Enter an associated description for each reference code.
7. Save or save and continue as follows:

File > Save or Save and Proceed
8. Close the window.

8.6.12 Setting Up Reference Stage Type IGSPS028

Program stage types are codes that an institution uses to indicate the level of progression in a student program attempt.

The institution-defined set of program stage types is maintained in the Program Stage Types window. Users can change the name of a program stage using the override facility.

For example, an organizational unit can change the Year 1 designation to Foundation Year.

Example of codes include the following:

- YEAR-01
- SCND-YEAR
- 3RD-YEAR

The data maintained in the Program Stage Types window identifies the stages of individual programs in the Program Version Notes window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Stage Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–27 Program Stage Types Window Description

Field Name	Type	Features	Description
Program Stage Type	Required		Program stage type
Description	Required		Program stage type description
Closed		Check box	If selected, prevents further use of program stage type

8.6.13 Setting Up Disciplines IGSPS040

Institution-defined discipline groups are comparable to government discipline groups defined in the Government Discipline Groups window, but provide greater flexibility by permitting classification at a more detailed level and the use of discipline group names specific to the institution. Discipline groups are uniquely coded to collect units of study into similar disciplines within branches of learning.

Note: Discipline group codes can be alpha, numeric, or a combination of both.

Prerequisites

Government Discipline Groups IGST007

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Disciplines > Disciplines window.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–28 *Disciplines Window Description*

Field Name	Type	Features	Description
Discipline Group	Required		Institution-defined discipline group reflecting the field of academic learning into which a unit of study is classified
Description	Required		Discipline group description
Government Discipline Group	Required	List of values	Government-defined field of academic learning into which a unit of study is classified
Closed	Optional	Check box	If selected, prevents further use of discipline group
Funding Index 1, 2, 3	Optional		Funding index information for government purposes

8.6.14 Setting Up Program and Unit Note Types IGSPS069

Notes of many types can be created, each type reflecting the common purpose of the notes associated with it. Notes can be created, stored, and retrieved in almost any format.

A note type is an institution-defined classification of notes related to a program. For example, a Handbook note type can refer to notes containing information for publication in an institution's official handbook.

The text notes procedure attaches additional information to records in Student System and can be accessed from windows in many subsystems.

All notes must be assigned a note type. The types are defined by the institution for each subsystem in which notes are used.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program and Unit Note Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–29 Program and Unit Note Types Window Description

Field Name	Type	Features	Description
Note Type	Required		Name or code of the note type
Description	Required		Description for the program and unit note type

8.6.15 Setting Up Dictionary of Occupational Titles IGSPS070

The *Dictionary of Occupational Titles* codifies all professions and professional titles. The Occupational Titles and Related Programs window is used to view programs at the institution that are available for students interested in the associated occupations.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Occupational Titles Dictionary > Occupational Titles Dictionary window

Steps

1. Enter data in appropriate fields. The following information applies to this step.

Data in the DOT Code field cannot be modified.

If a Dictionary of Occupational Titles record is associated with a program, it cannot be deleted.

2. Save your work.

8.6.16 Setting Up Programs Eligible for Financial Aid IGSPS073

The Programs Eligible for Financial Aid window is used by the financial aid staff at an institution.

The window distinguishes between financial aid from federal, state, and institutional sources.

Prerequisites

Basic Program Details IGSPS013

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Programs for Financial Aid window

Steps

1. Query the appropriate record.
2. Enter data in appropriate fields.
3. If the program is not eligible for state financial aid, deselect the State check box.
4. If the program is not eligible for federal financial aid, deselect the Federal check box.
5. If the program is not eligible for institutional financial aid, deselect the Institutional check box.
6. Save your work.

8.6.17 Setting Up Catalog Definition IGSPS096

Use the catalog and schedule definition procedures to create and maintain catalog and schedule definitions.

The Catalog and Schedule Notes window is used to attach additional information to catalog and schedule definitions in the form of notes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Catalogs and Schedules > Catalog Definition window

Program Structure and Planning > Catalogs and Schedules > Schedule Definition window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–30 Catalog and Schedule Definition Window Description

Field Name	Type	Features	Description
Versions Tab			
Version	Required		Catalog or schedule version Note: Versions cannot be deleted if referenced in the Note Details region of the Catalog Notes and Schedule Notes windows.
Description	Required		Catalog version description
Closed	Optional	Check box	If selected, prevents further use of version
Note Types Tab			
Note Type	Required		Catalog or Schedule note type Note: Note types cannot be deleted if referenced in the Note Details region.
Description	Required		Catalog or schedule note type description
Closed	Optional	Check box	If selected, prevents further use of catalog or schedule note type

8.6.18 Setting Up Catalog Notes IGSPS097

Use this procedure to create catalog notes.

Prerequisites

Catalog Definition IGSPS096

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Catalogs and Schedules > Catalog Notes >
Catalog Notes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–31 Catalog Notes Window Description

Field Name	Type	Features	Description
Catalog Version			Catalog version number
[Description]	Display only		Catalog version description
Closed	Optional	Check box	If selected, prevents further use of catalog version
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Note Details region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Note Details region is refreshed only when the user navigates to the Note Type field in the Note Details region. Leave deselected to speed up performance when querying records.
Note Details Region			
Note Type	Required	List of values	Note type attached to the catalog version
Description	Display only		Note type description
Create Date	Required		Note type creation date
End Date			End date of catalog notes
Sequence	Required		Sequence of catalog notes
Notes		Button	Opens the Notes window to enter additional information regarding the catalog version

8.6.19 Setting Up Basic Program Details IGSPS013

Students are enrolled in particular program versions.

A program includes one or more areas of study that can lead to a formal award. Each program is defined by numerous attributes.

Many versions of a program can be created if new versions have significantly different attributes from previous versions. Program versions represent a history of changes made to a program's attributes. Students can complete the program version they are enrolled in even if a different program version is offered to new students. The institution determines whether changing one or more attributes results in the creation of a new version.

Student System provides the following rules for program versions:

- Articulated Programs
- Program Version Completion
- Program Version Honors Level
- Core

In addition to the rules provided by Oracle Student System for program versions, there is a procedure that automatically evaluates whether a student has satisfied the requirements of the Articulated Programs rule, which is used by the Statistics subsystem.

The Program Version Rules window can be accessed as follows:

- directly from the Program Structure and Planning menu
- using the navigation Button in the Program Ownership window

The program version notes procedure attaches additional information to program versions in the form of notes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–32 Basic Program Details Window Description

Field Name	Type	Features	Description
Program Code	Required		Program code
Primary Program Rank	Optional		Relative position of a program category to other categories
Version Number	Default, display only		Program version number; new program is assigned version number of 1 when record is saved; version automatically created by system

Table 8–32 Basic Program Details Window Description

Field Name	Type	Features	Description
Title	Required		Program name
Program Status	Required	list of values	Program status Note: Users cannot delete records if program status is Active or Inactive. Users cannot change program status from Active or Inactive to Planned. Users can change a program status of Planned to Active or Inactive.
Short Title	Required		Short version of program name
Abbreviation	Required		Abbreviated version of program name
[Descriptive Flexfield]	Optional		User-customization field
Program Details Tab			
Program Type	Required	List of values	Program type, for example, Bachelors or Non-award Note: The program type must be Award if program awards exist for the program. That is, if program completion results in awarding a degree or certificate, it must be of type Award.
Responsible Organizational Unit	Required	List of values	Organizational unit with responsibility for program
Government Special Program Type	Required	List of values	Government special program type
Generic Program	Optional	Check box	If selected, indicates that program is generic
Graduate Students	Optional	Check box	If selected, indicates that students can graduate from program or program is award program
Supplemental Exams Permitted	Optional	Check box	If selected, indicates that supplemental exams are permitted Note: The Supplemental Exam check box in the Basic Unit Details window overrides the Supplemental Exams Permitted check box in this window.
Program Dates Tab			

Table 8–32 Basic Program Details Window Description

Field Name	Type	Features	Description
Effective Date	Required	Calendar	Effective start and end date; default start date is current date Note: The end date field must be left blank when creating new program version. An end date is entered only for inactive program versions. Note: A program's end date must be greater than or equal to the expiration date if an expiration date is set.
Approval Date	Optional	Calendar	Date program approved for inclusion in curriculum
Expiration Date	Optional	Calendar	Date when program is no longer available for student enrollment if no administrative action taken pending review, accreditation, or some other event Note: Units with an expiration date cannot be used by the Admissions subsystem except for readmission.
External Approval Date	Optional	Calendar	Date external entity, such as government agency, approves program for inclusion in curriculum
Review Date	Optional	Calendar	Date program version must be reviewed
Intermission Region			
Allow Intermission	Optional	Check box	Indicates if students can take intermission from program version
Count In Progression	Optional	Check box	Indicates if intermission period is counted in progression
Number Units Before Intermission	Optional		Number of units students must complete before taking intermission
Max Intermission (Months)	Optional		Maximum number of months students can take intermission
Advanced Standing Region			
Qualification Recency	Optional		Time period, in years, for which other studies will be recognized for the purpose of granting advanced standing in a program
External Limit	Optional		Maximum amount of advanced standing that can be granted in the program for studies undertaken outside the institution

Table 8–32 Basic Program Details Window Description

Field Name	Type	Features	Description
Internal Limit	Optional		Maximum amount of advanced standing that can be granted in a program for studies undertaken at the institution
Program Load Tab			
Credit Point Required	Optional		Minimum number of credit points student requires to complete program
Min Submission %	Optional		Percentage of total effective full-time days that must pass before a research thesis can be submitted. This value is used in the calculation of submission dates for research candidature.
Residency Credit Points Req'd	Optional		Minimum number of credit points student must take at institution, rather than abroad or at another institution
Credits Total Effective Full Time Student Units	Optional		Total full-time equivalency for the program; represents the student load for a unit or part of a unit expressed as a proportion of the workload for a standard annual program for students undertaking a full year of study in a particular year of a particular program.
Standard Annual Load	Optional		<p>Load in credit points that a full-time student would normally study in a year if enrolled in the program. This is used to calculate the relative weighting of the units for the Effective Full Time Student Units calculation.</p> <p>Note: If the program annual load for a program version is not constant for each year of the program, the Standard Annual Load field must be left blank and the Program Annual Load window must be used to enter the annual load for each year of the program.</p>
Contact Hours	Optional		Minimum number of contact hours, which is in-class time for a unit, Required of the student for completion of the program
Government Program Load	Optional		Aggregate Effective Full Time Student Units value for a program, expressed in tenths

Table 8–32 Basic Program Details Window Description

Field Name	Type	Features	Description
Min Credit Points Per Calendar	Optional		Minimum number of credit points student must have in teaching period Note: The value must be less than or equal to the maximum credit points value.
Max Credit Points Per Calendar	Optional		Maximum number of credit points student can have in teaching period Note: This data is used to validate student schedules during enrollments to prevent students from overloading their schedules.
Other Program Detail		Button	displays buttons to enter additional program details

8.6.20 Setting Up Program Version Notes IGSPS027

Users can give additional information on a program version in the Program Version Notes window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Version Note.
The Program Version Notes window appears.
3. Enter data in appropriate fields.
4. In the Program Note Type field, select a program version note type and description from the List of values.
5. To enter a note for a program version note type, select the appropriate program version note type and click Edit Note.

The Text Notes window appears.

6. In the field, enter descriptive text.
7. Save or save and continue as follows:
File > Save or Save and Proceed

8.6.21 Setting Up Special Requirements IGSPS062

The special requirements completion procedure maintains institution-defined special requirements that count toward program completion.

Institution-defined special requirements codes indicate the units completed by individual students earlier in fulfillment of their program attempts.

Examples of special requirements codes are First Aid1, Bronze Med, and CPR.

Data created in the Special Requirements Completion window is used within the Special Requirements window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Special Requirements window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–33 Special Requirements Window Description

Field Name	Type	Features	Description
Special Requirement Code	Required		Unique identifier of special requirement to be fulfilled by the student for program completion
Description	Required		Special requirement description
Closed	Optional	Check box	If selected, prevents further use of the special requirement
Comments	Optional		Additional information on the special requirement

8.6.22 Setting Up Enrollment Categories IGSEN009

It is recommended that Enrollment Categories setup is completed during setup of each program. The information necessary to complete this setup should be gathered in advance of this procedure.

Use this procedure to enter and maintain the institution-defined set of enrollment categories. Enrollment categories classify different methods and procedures involved in enrolling students. Within the system, enrollment categories configure enrollment sessions, as well as the layout and content of the Student Enrollments and Special Requirements windows.

For example, an enrollment category Interntl can be created specifically to accommodate the enrollment of international students.

Entering Interntl as the enrollment category parameter in the Session Details window causes the content and layout of the subsequent Student Enrollments window to be configured according to the procedures specified for Interntl in the Enrollment Category Procedure Details window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–34 Enrollment Categories Window Description

Field Name	Type	Features	Description
Enrollment Category	Required		Institution-defined classification of students who share common enrollment characteristics
Description	Required		Enrollment category description
Closed	Optional	Check box	If selected, closes an enrollment category and prevent further use Note: You cannot delete an enrollment category.

8.7 Program Details

In general, the owner or owners of a program version are responsible for the delivery of the program to students. A program version can be owned by more than one organizational unit in varying proportions. In the Program Ownerships region of the Program Ownership window, users enter the organizational unit or units that own the selected program version.

For example, Program version A 300 - Bachelor of Arts, version x, is owned by the Faculty of Arts, 100%.

The following information applies to this procedure:

Ownership of a program must total 100%.

Program ownership can be added only against organizational units that are Active.

Program ownership cannot be altered once the program version is made Inactive.

Assigning ownership of a program version to one or more organizational units permits use of this information elsewhere in the system. In particular, the information can be used in reports and statistics.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Ownership.

The Program Ownership window appears.

4. Enter data in appropriate fields.

The following information applies to this step:

- If, after an owning organizational unit is deleted, any owning organizational units still remain, the percentages for the remaining organizational units must be adjusted until the total is 100.
 - The Organizational Unit Code, Organizational Start Date, and Description fields are protected from alteration. Only the Percentage field can be modified.
 - To change an owning organizational unit, the existing owning organizational unit must be deleted and a new owning organizational unit added.
 - Any alteration to ownership percentages must still total 100 percent.
5. In the Organizational Unit Code field, enter a valid organizational unit code or select the appropriate owning organizational unit from the List of values.
 6. Perform one of the following options:

If the program version is owned entirely by the selected organizational unit, enter 100 in the % field.

If the program version is owned by more than one organizational unit, enter the proportion of ownership of this organizational unit up to two decimal places in the % field.

For example, enter one third ownership as 33.33.
 7. If a program version is owned by more than one organizational unit, repeat Step 7 until the percentage total is 100.
 8. Save or save and continue as follows:

File > Save or Save and Proceed

8.7.1 Setting Up Program Groups IGSPS012

Each program group is assigned a program group code and a group type that identifies the purpose of the program group and enables additional functionality. The organizational unit responsible for the program group is also recorded.

In the Program Group Members region, program versions are assigned to a program group.

Prerequisites

Calendar Types IGSCA002

Government Program Attendance Types IGSST011

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Groups > Program Groups window

Steps

1. Enter data in appropriate fields. The following information applies to this step.
If a program group has members, it cannot be deleted. If a program group has members, only the description can be modified if the change does not affect the meaning of the program group. To prevent further use of a record, the Closed Check box must be selected.
2. Optionally, to create a program group member, go to the Program Group Members region and enter data in appropriate fields.

The following information applies to this step:

Programs added to a program group are included in the program group's functions, reports, and queries.

Programs deleted from a program group are not included in the program group's reports or queries.

3. Save your work.

Guidelines

The following information applies to this procedure:

- A program group cannot be added to a closed group type.

- A program group cannot be added to a closed organizational unit.

8.7.2 Setting Up Program Awards IGSPS017

The program awards procedure defines awards that result from successful completion of a program, such as Bachelor of Science or Diploma of Business Administration. The award codes, their corresponding titles, and diploma types are maintained in the Awards window.

The program awards procedure also defines award ownership. An award can be owned by more than one organizational unit in varying proportions.

The Award Code field in the Program Awards window is protected against modification. An incorrectly entered program code can be deleted and the correct code inserted.

Combined degrees are an example of programs that can have more than one award.

Program awards cannot be deleted. You must close program awards if you do not want that program award to be used.

Prerequisites

Awards IGSPS008

Organizational Structure IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Award.

The Program Awards window appears.

4. Enter data in each field of the Program Awards window as described in the table.
5. Save or save and continue as follows:

File > Save or Save and Proceed

A message warning that award ownership is not defined appears.

6. Click OK.

Table 8–35 Program Awards Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program unique identifier
Version Number	Default display only		Program version number
Program Status	Default display only		Program status; Planned, Active, or Inactive
Title	Default display only		Program title; for example, computer science, mechanical engineering
Program Awards Region			
Award Code	Required	List of values	Award code Note: Programs with multiple awards must have multiple fields of study and vice versa.
Award Title	Default, display only		Award title
Credential Type	Default, display only		Credential type, for example, Master, Cert, and so on.
Default	Optional	Check box	If selected, indicates that an award is selected as default for a program
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Program Award Ownerships region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Program Award Ownerships region is refreshed only when users navigate to the Organizational Unit Code field in the Program Award Ownerships region. Leave deselected to speed up performance when querying records.
Program Award Ownerships Region			

Table 8–35 Program Awards Window Description

Field Name	Type	Features	Description
Organizational Unit Code	Required	List of values	Organizational unit code
Organizational Start Date	Optional		Date when an organizational unit is effective
Description			Organizational unit description
%	Required		<p>Program award ownership percentage</p> <p>Note: If the award is owned entirely by the selected organizational unit, enter 100 in the % field. If the award is owned by more than one organizational unit, enter the proportion of ownership of this organizational unit up to two decimal places in the % field. For example, enter one third ownership as 33.33.</p> <p>Note: After an owning organizational unit is deleted, if any owning organizational units still remain, the percentages for the remaining organizational units must be adjusted until the total is 100. Any alteration to ownership percentages must still total 100.</p>

8.7.3 Setting Up Program Fields of Study IGSPS018

One or more fields of study can be entered for a program version. The fields of study are created and maintained using the Program Fields of Study window. Each field of study maps to a government field of study that is used for statistical reporting.

Note: Fields of study map to government fields of study that are used for statistical reporting. Changes to fields of study can affect the statistics.

For example, the program Bachelor of Arts, Languages can have the field of study Linguistics entered against it. This can be mapped to the Government Field of Study 030304 - Linguistics. Psychology and Agricultural Science are also examples of fields of study.

The following information applies to this procedure:

- A program version can have more than one field of study.
- Combined degree programs are the only programs that have more than one field of study.

- Each field of study can be assigned a percentage representing the proportional weighting of the field of study in relation to other fields of study of the program version. The total of the percentages for all fields of study for a program version must be 100.
- Only one field of study can be identified as the major field of study.
- Fields of study are created and maintained using the Fields of Study window.
- A field of study cannot be altered once the program version is made Inactive.
- Closed fields of study cannot be added to program versions.

Prerequisites

Fields of Study IGSPS004

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click **Other Program Detail**.
3. Click **Program Field of Study**.

The Program Fields of Study window appears.

4. Enter data in appropriate fields.

The following information applies to this step:

An Active program version must contain at least one field of study. If all fields of study are deleted, at least one new field of study must be added before the program version is saved.

Only the Major field and Percentage fields can be modified. To change a field of study, it is necessary to delete incorrect records or create new records.

5. In the Field of Study field, enter a valid value or select the appropriate field of study from the List of values.
6. Perform one of the following options:

If only one field of study is defined for the program version, the Major Field check box is selected by default. Enter 100 in the % field.

If more than one field of study is created, select the Major Field check box for the field of study considered to be the major field of study and adjust the percentage values in the % field of all records so that their total is 100.

7. Save or save and continue as follows:

File > Save or Save and Proceed

8.7.4 Setting Up Program Ownership IGSPS014

In general, the owner or owners of a program version are responsible for the delivery of the program to students. A program version can be owned by more than one organizational unit in varying proportions. In the Program Ownerships region of the Program Ownership window, users enter the organizational unit or units that own the selected program version.

For example, Program version A 300 - Bachelor of Arts, version x, is owned by the Faculty of Arts, 100%.

The following information applies to this procedure:

Ownership of a program must total 100%.

Program ownership can be added only against organizational units that are Active.

Program ownership cannot be altered once the program version is made Inactive.

Assigning ownership of a program version to one or more organizational units permits use of this information elsewhere in the system. In particular, the information can be used in reports and statistics.

Prerequisites

Organizational Structure IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.

2. Click Other Program Detail.

3. Click Program Ownership.

The Program Ownership window appears.

4. Enter data in appropriate fields.

The following information applies to this step:

- If, after an owning organizational unit is deleted, any owning organizational units still remain, the percentages for the remaining organizational units must be adjusted until the total is 100.
 - The Organizational Unit Code, Organizational Start Date, and Description fields are protected from alteration. Only the Percentage field can be modified.
 - To change an owning organizational unit, the existing owning organizational unit must be deleted and a new owning organizational unit added.
 - Any alteration to ownership percentages must still total 100 percent.
5. In the Organizational Unit Code field, enter a valid organizational unit code or select the appropriate owning organizational unit from the List of values.
 6. Perform one of the following options:
 - If the program version is owned entirely by the selected organizational unit, enter 100 in the % field.
 - If the program version is owned by more than one organizational unit, enter the proportion of ownership of this organizational unit up to two decimal places in the % field.
 - For example, enter one third ownership as 33.33.
 7. If a program version is owned by more than one organizational unit, repeat Step 7 until the percentage total is 100.
 8. Save or save and continue as follows:

File > Save or Save and Proceed

Note: Program ownership can be changed at any time after setup as long as percentages total 100.

8.7.5 Setting Up Program Group Membership IGSPS015

A program version is assigned to a predefined program groups. Any functionality specified as applying to the program group is applied to the program version by virtue of its membership in the group. Reports can be generated by program group which results in the selection of all group members.

Fields in the Program Group Memberships region of the Program Group Membership window are protected from modification. Modification of group memberships can be achieved only by adding new program groups and deleting old program groups.

The following information applies to this procedure:

- The program group to which the program version is assigned must exist in the system.
- Program groups are created and maintained using the Program Group Membership window. The same window also assigns program versions to program groups when a number of program versions are to be assigned to one program group.
- A program version cannot be added against a Closed program group.
- Program group membership cannot be altered once the program version is made Inactive.
- Assigning a program version to membership of a program group causes any functionality applied to the program group to affect the program version.

Program groups cannot be deleted. You must close program groups if you do not want that program group to be used.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.

3. Click Program Group Membership.
The Program Group Membership window appears.
4. Enter data in appropriate fields.
5. In the Program Group Code field, enter a valid program group code or select the appropriate program group from the List of values.
6. In the Description field, enter a description of the program group code.
7. Save or save and continue as follows:
File > Save or Save and Proceed

8.7.6 Setting Up Program Reference Codes IGSPS023

Program reference codes can also be entered to identify a program version for other specific purposes. Each program version in Student System is identified by its unique combination of program code and version number. This feature is particularly useful for entering codes used by other systems to identify a program version.

Each reference code assigned to a program version must be assigned a reference code type, which is maintained in the Reference Code Types window. Reference code types are mapped to system reference code types that are recognized by the system for specific functions. The mandatory reference types cannot be deleted or modified. Reference codes can be modified for the mandatory reference types.

Prerequisites

Reference Code Types IGSPS011

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Reference Code Types window

Steps

1. Click Other Program Detail.
2. Click Program Reference Code.
The Program Reference Codes window appears.

3. Enter data in each field of the Program Reference Codes window as described in the window description table.
4. Save or save and continue as follows:
File > Save or Save and Proceed

8.7.7 Setting Up Program Categorizations IGSPS019

The categorizing programs part of the program categories procedure enters individual program versions as belonging to the selected program category in the Program Categorizations region of the Program Categories window.

For example, with the program category CL - Chinese Language selected in the Program Categories window, the user can place any programs involving the teaching of Chinese language in this category by adding them in the Program Categorizations region of the Program Categories window.

Notes of many types can be created, each type reflecting the common purpose of the notes associated with it. Notes can be created, stored, and retrieved in almost any format.

A note type is an institution-defined classification of notes related to a program. For example, a Handbook note type can refer to notes containing information for publication in an institution's official handbook.

The text notes procedure attaches additional information to records in Student System and can be accessed from windows in many subsystems.

All notes must be assigned a note type. The types are defined by the institution for each subsystem in which notes are used.

The following information applies to this procedure:

- Program categories are created and maintained in the Program Categorizations window.
- Closed program categories cannot be assigned to a program version.
- Program categories cannot be altered once the program version is made Inactive.
- Assigning a program category to a program version permits the program version to be grouped with other program versions of the same category.

Prerequisites

Program Categories IGSPS003

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Categorization.
The Program Categorizations window appears.
4. Enter data in appropriate fields.
5. In the Program Category field, enter a valid value or select the appropriate category from the List of values.
6. Save or save and continue as follows:
File > Save or Save and Proceed

8.7.8 Setting Up Restricted Funding Sources IGSPS024

Restricted funding sources are those funding sources against which a student's enrollment in the program version can be funded.

One of the funding sources can be nominated as the default funding source. Students enrolling in the program version would then have their funding source set by default to the default funding source. If this funding source does not have the Restrict check box selected, then the default funding source can be overridden at enrollment.

Students enrolling in program versions with no recorded funding source restriction can have their funding source set to any of the available funding sources.

Employer Funded or Special Grant are examples of user-defined restricted funding sources.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

- 1. Query the appropriate record.
- 2. Click Other Program Detail
- 3. Click Funding Source Restriction

The Restricted Funding Sources window appears. Enter data in appropriate fields as described in the table.

- 4. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–36 Restricted Funding Sources Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program's unique code
Version Number	Default display only		Program version
Program Status	Default display only		Program status
Title	Default display only		Program title
[Data Coordination Check Box]			If selected, data in the Funding Source Restrictions region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Funding Source Restrictions region is refreshed only when users navigates to the Funding Source field in the Funding Source Restrictions region. Leave deselected to speed up performance when querying records.
Funding Source Restrictions Region			
Funding Source	Required	List of values	Funding source

Table 8–36 Restricted Funding Sources Window Description

Field Name	Type	Features	Description
Description			Funding source description
Default		Check box	If selected, indicates default funding source Note: Only one funding source can be selected as default.
Restrict		Check box	If selected, indicates funding source is restricted Note: If there is more than one funding source, all of them must be selected as Restrict. A closed funding source cannot be restricted. Funding source restrictions cannot be altered once the program version is made inactive. A program version can have more than one restricted funding source.

8.7.9 Setting Up Program Stages IGSPS026

The program stages procedure enables users to perform the following tasks:

- enter the stages of individual programs
- enter an override description for a program
- view the rule applying to a program stage
- access the Rule window to edit rule text

Typically, institutions view completion of a year of a program as a measure of progression. For example, a three-year degree usually has three stages: Year 1, Year 2, and Year 3. However, institutions or organizational units can use this facility to define program stages in any way they want. Institutions then apply rules to determine if a stage is completed.

Program Stage Completion is the only rule in the current Oracle Student System. There is no process that automatically evaluates whether a student has satisfied the requirements of the Program Stage Completion rule.

Users view a rule by navigating to the second Program Stages window from the first Program Stages window.

To edit a rule, users navigate to the Rule window from the second Program Stages window.

Prerequisites

Program Stage Types IGSPS028

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Stage.
The Program Stages window appears.
4. Enter data in appropriate fields of the Program Stages window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

8.7.10 Setting Up Program Occupational Titles IGSPS071

In the Program Occupational Titles window, institutions associate programs with professions and professional titles that appear in this guide.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Occupational Titles window

Steps

1. Alternatively, navigate to the Program Occupational Titles window as follows:
Program Structure and Planning > Basic Program Details
The Basic Program Details window appears.
2. Query the appropriate record.
3. Click Other Program Detail.

4. Click Occupational Titles.
5. The Program Occupational Titles window appears.
6. Enter data in appropriate fields as described in the table.
7. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–37 Program Occupational Titles Window Description

Field Name	Type	Features	Description
Program	Default display only		Program code
[Description]	Default display only		Program description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Occupational Titles region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Occupational Titles region is refreshed only when the user navigates to the Code field in the Occupational Titles region. Leave deselected to speed up performance when querying records.
Occupational Titles Region			
Code	Required	List of values	Occupational title code
Title	Display only		Occupation's name
Alternate Titles	Display only		Occupation's alternate title
Back		Button	Returns users to the Basic Program Details window

8.7.11 Setting Up UK Statistics IGSHE014 - Program Tab

Program related data required for reporting to HESA and not captured in Student System is manually entered in the UK Statistics window. Data must be recorded for the program for a valid student or combined HESA return to be generated.

Prerequisites

IGS: Country Code profile option set to United Kingdom

Responsibility

Oracle Student System Super User

Navigation

Navigate to the Basic Program Details as follows:

Program Structure and Planning > Basic Program Details

Steps

- 1. Query the required program as follows:

View > Query by Example > Enter

- 2. Enter search criteria.

- 3. Run the query as follows:

View > Query by Example > Run

The basic program details are retrieved.

- 4. Click Other Program Detail.

- 5. Click **UK Statistics**.

The UK Statistics window appears.

- 6. Enter data as described in the following table. Save your work.

Table 8–38 UK Statistics Window Description, Program Tab

Field Name	Type	Features	Description
Program Tab			
Program Code	display only		program code
Teacher Training Program ID	optional		teacher training program identifier
FE Program Marker	optional	list of values	further education program; indicates if program is at FE level and whether the fee is an annual fee or whole course fee
ITT Phase/Scope	optional	list of values	Initial Teacher Training phase or scope
Return Type	optional	list of values	return type
Other Institutions Providing Teaching, 1	optional	list of values	institution providing teaching for this program

Table 8–38 UK Statistics Window Description, Program Tab

Field Name	Type	Features	Description
Franchising Activity	optional	list of values	reported franchising activity
Proportion of Teaching in Welsh	optional		percentage of teaching in Welsh
Fee Band	optional	list of values	fee band
Fundability	optional	list of values	fundability code; indicates if funding provided by Funding Council
FTE Intensity	optional		percentage of full time equivalence used in student FTE calculation
Teaching Period Start Date	optional	pop-up calendar	teaching period start date used in FTE calculation if nonstandard teaching for period
Teaching Period End Date	optional	pop-up calendar	teaching period end date used in FTE calculation if nonstandard teaching for period
Version Number	display only		program version number
Credit Transfer Scheme	optional	list of values	credit transfer scheme
Level Applicable to Funding Council HESES	optional	list of values	level applicable to funding council HESES
Bilingual ITT Marker	optional	list of values	bilingual ITT marker; indicates if program leads to bilingual teaching qualification
Location of Study	optional	list of values	study location
Other Institutions Providing Teaching, 2	optional	list of values	second institution providing teaching of this program
Source of NHS Funding	optional	list of values	source of NHS funding
Proportion not Taught by Institution	optional		proportion of program not taught by institution
Use Program for Calculation		check box	if selected, program and year of program data is used to calculate credit obtained and cost center subject code proportions; if deselected, unit enrollment data is used

Table 8–38 UK Statistics Window Description, Program Tab

Field Name	Type	Features	Description
Teaching Qualification Sought Region			
Sector	optional	list of values	education sector in which teaching qualification sought
Subject 1	optional	list of values	subject in which teaching qualification sought
Subject 2	optional	list of values	subject in which teaching qualification sought
Subject 3	optional	list of values	subject in which teaching qualification sought
Back		button	closes UK Statistics window and returns to Other Program Details window

8.8 Program Offering

8.8.1 Setting Up Program Offering IGSPS029

A Program offering is created by assigning a program version to a calendar type. Programs can be offered only in calendar types of the Academic calendar category. A List of values containing only these calendar types appears in the Calendar Type field. A program version can be offered in more than one calendar type, each constituting a different program offering.

For example, a program version is assigned to the Standard Academic Year calendar, indicating that it can be offered in any calendar of that type. The program version can be offered in calendar types such as Standard Academic Year and MBA Calendar for different offerings of the program, allowing different offering options to be applied to the different offerings.

After creating a program offering, specific occurrences of the offering, or program offering instances, can be defined by specifying the particular calendar instance in which the program version is offered. A program offering can have numerous program offering instances.

The Rollover Program Offering Pattern concurrent process performs a bulk rollover of program offering instances and patterns.

For example, a new program offering is created by assigning a program version to the Standard Academic Year calendar type. This program offering can have program offering instances in numerous calendar instances of the Standard Academic Year type. Each instance is specified by entering the calendar instance in which the program version is offered, for example, the standard academic year 01-JAN-2000 to 31-DEC-2000.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. Enter data in appropriate fields as described in the table.
4. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–39 Program Offerings Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program's unique code
Version Number	Default display only		Program version
Program Status	Default display only		Program status
Title	Default display only		Program title

Table 8–39 Program Offerings Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]		Check box	If selected, data in the Program Offerings region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Program Offerings region is refreshed only when the user navigates to the Calendar Type field in the Program Offerings region. Leave deselected to speed up performance when querying records.
Program Offerings Region			
Calendar Type	Required	List of values	Calendar type
Description	Display only		Calendar type description
Closed		Check box	If selected, prevents further use of calendar type
[Descriptive Flexfield]	Optional		User-customization field
Program Offering Notes		Button	Opens Program Offering Notes window
Program Offering Options		Button	Opens Program Offering Options window
Patterns of Study		Button	Opens Patterns of Study window
Program Offering Unit Sets		Button	Opens Program Offering Unit Sets window
Program Offering Instances Region			
Alternate Code		List of values	Calendar instance alternate code
Start Date	Display only		Calendar instance start date
End Date	Display only		Calendar instance end date
Calendar Status	Display only		Calendar status

Table 8–39 Program Offerings Window Description

Field Name	Type	Features	Description
Minimum	Optional		Minimum entry assessment score for admission Note: The minimum entry assessment score entered in Program Offering Patterns window overrides this score.
Guaranteed	Optional		Entry assessment score that guarantees admission offer
Program Offering Patterns		Button	Opens Program Offering Patterns window

8.8.2 Setting Up Program Offering Notes IGSPS031

The program offering notes procedure attaches additional information to program offerings in the form of notes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. Click Program Offering Notes.
The Program Offering Notes window appears.
4. Enter data in appropriate fields of the Program Offering Notes window as described in the table.
5. Save or save and continue as follows:

File > Save or Save and Proceed,

Table 8–40 *Program Offering Notes Window Description*

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Program Status	Default, display only		Program status
Calendar Type	Default, display only		Calendar type
[Description]	Default, display only		Description of the calendar type
Title	Default, display only		Program title
Program Offering Notes Region			
Program Note Type	Required	List of values	Program offering note type
Description	Default, display only		Description of the program offering note type
Edit Note		Button	Opens Text Notes window

8.8.3 Setting Up Program Offering Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.9 Final Program Details

8.9.1 Setting Up Program Categories IGSPS003

Previously created categories can be assigned to a program version for the purpose of grouping program versions.

Program categories can be used for specific purposes within the Statistics subsystem.

Fields in the Program Categorizations region of the Program Categorizations window are protected from modification. To modify program categorizations, add and delete program categories.

Undergraduate, Non-Award, and Corporate are examples of program categories.

Maintaining Program Categories

The program categories procedure creates, deletes, and modifies institution-defined program categories in the Program Category region of the Program Categories window. A diverse set of programs, with attributes that cannot be easily selected, can be categorized for inquiry, reporting, and manipulation of programs by category.

For example, all programs of the institution that include the study of Chinese language can be grouped for the purpose of managing students' academic progression in an institution-defined program category CL > Chinese Language.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Categories > Program Categories window

Steps

1. In the Program Category field, query the name of the program category.
2. In the Program Code field of the Program Categorizations region, select the program version number from the List of values or enter a new program code.
If a program code is already active, the List of values appears.
3. Save your work.

8.9.2 Setting Up Program Groups IGSPS012

Each program group is assigned a program group code and a group type that identifies the purpose of the program group and enables additional functionality. The organizational unit responsible for the program group is also recorded.

In the Program Group Members region, program versions are assigned to a program group.

Prerequisites

Calendar Types IGSCA002

Government Program Attendance Types IGSST010

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Groups > Program Groups window

Steps

1. Query data in appropriate fields.
2. To create a program group member, go to the Program Group Members region and enter data in appropriate fields.

The following information applies to this step:

Programs added to a program group are included in the program group's functions, reports, and queries.

Programs deleted from a program group are not included in the program group's reports or queries.

3. Save your work.

Guidelines

If a program group has members, it cannot be deleted. If a program group has members, only the description can be modified if the change does not affect the meaning of the program group. To prevent further use of a record, the Closed Check box must be selected.

The following information applies to this procedure:

- A program group cannot be added to a closed group type.
- A program group cannot be added to a closed organizational unit.

8.9.3 Setting Up Primary Program Group IGSPS122

Prerequisites

Basic Program Details IGSPS013

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Primary Program Setup window

The Basic Program Details window appears.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–41 Primary Program Set Up Window Description

Field Name	Type	Features	Description
Program Type	Required	List of values	Program type
Active Programs Only		Check box	If selected, displays programs with the status Active
Enable automatic determination of primary program		Check box	If selected, indicates that system-defined selection of primary program
Programs Region			
Program Code	Default display only		Program code
Version Number	Default display only	List of values	Program version
Description	Default display only		Program description
Primary Program Rank	Optional		Relative position of a program category to other categories

8.9.4 Setting Up Alternative Exits IGSPS016

An alternative exit is represented by another program version entered in the system. Students satisfying the program completion requirements of the alternative exit can exit their enrolled program with the award for the alternative exit program version.

For example, a Bachelor of Commerce degree can have an alternative exit of a Diploma of Business Administration. This means that students enrolled in a Bachelor of Commerce program could exit that program with a Diploma of Business Administration if they satisfy the program completion requirements of the lesser award.

Prerequisites

Basic Program Details IGSPS013

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate data.
2. Click Other Program Detail.
3. Click Alternative Exit.

The Program Alternative Exits window appears.

4. Enter data in each field of the Program Alternative Exits window, as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–42 Program Alternative Exits Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program offering note code
Version Number	default display only		Program offering note version number
Program Status	default display only		Status of the program offering note status
Title	default display only		Program offering note title
Alternative Exits Region			
Exit Program Code	Optional	List of values	Program code of the alternative exit program version
Exit Version Set	Optional		Exit version set Note: Exit version set is the version number that identifies program versions specified by the exit program that are valid as alternative exits

8.9.5 Convert Programs to Active

After programs have been created in Planned status, they should be converted to Active status for additional setup.

8.10 Units

Unit setup includes setting up data for units and unit sets and mapping this data to government codes. Unit sets are groups of units that are normally associated with a program.

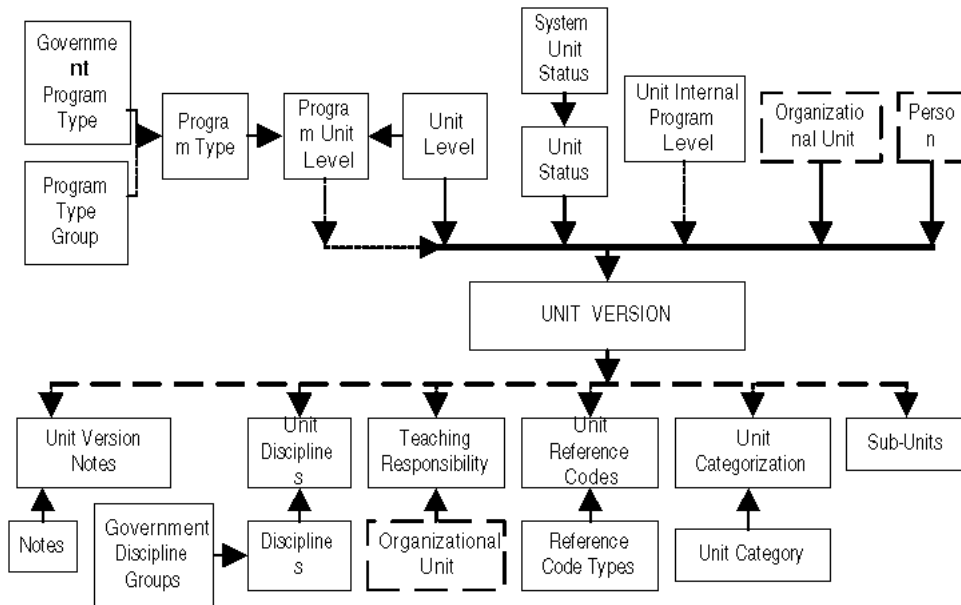
The Unit windows enable users to create many institution-defined elements necessary for use in Student System. Users must set up these elements before they can use them in other subsystems of Student System.

The unit elements defined and maintained in the Unit windows include the following:

- stages of development
- versions
- attributes
- offerings
- rules
- history

Relationships Required to Define Unit Versions

Figure 8–7 shows data required to define unit versions.

Figure 8–7 Relationships Required to Define Unit Versions

The diagram shows the data required to define Unit Versions, the data that can be maintained against Unit Versions, and the data relationships involved. The arrows indicate a dependency; for example, Disciplines is an attribute of Unit Disciplines. Dotted lines indicate an optional relationship.



Data from other subsystems

The data elements above the unit version are reference data used in defining a unit version. Unit status and program unit level are both dependent on other reference data.

The data elements below the unit version are details that can be maintained for each unit version, once it is defined.

Note: Many of the attributes of a unit version are defined by other data, maintained as reference data. For example, a unit version can be assigned a unit discipline that must be maintained as reference data, and is defined by an appropriate government discipline group.

8.10.1 Setting Up Unit Statuses IGSPS042

A unit status defines the state of activity of a unit version. Unit status provides flexibility by permitting the subdivision of system statuses and the use of status

names specific to the institution. Each institution-defined unit status must be mapped to a system unit status that is recognized by the system for other functionality.

For example, if the term Current is a familiar term identifying a unit status at an institution, this can be mapped to the system status Active. An institution can subdivide the system status Inactive into Inactive and Sleeping.

The following table shows part examples of unit statuses for an institution.

Table 8–43 Unit Statuses Example

Unit Status	Description	System Unit Status
Current	Currently available for use	Active
Inactive	No longer available	Inactive
Sleeping	Temporarily unavailable	Inactive
Planned	In planning stage	Planned

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Statuses > Unit Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–44 Unit Statuses Window Description

Field Name	Type	Features	Description
Unit Status	Required		Unit status Note: A unit status used in the definition of a unit cannot be deleted, only the description can be modified. It is preferable to create a new unit status if the changes in the description are substantial.

Table 8–44 Unit Statuses Window Description

Field Name	Type	Features	Description
Description	Required		Unit status description
System Unit Status	Required	Drop-down list	System-defined unit status; can be Active, Inactive, or Planned; defaults to Active
Closed	Optional	Check box	If selected, prevents further use of unit status

8.10.2 Setting Up Unit Levels IGSPS043

Unit levels specify the year level in which units are usually attempted for particular program types. This means that a unit version can have a different unit level depending on the program type associated with it. A unit level is generally applied to, but not restricted to, the year level of the program to which the unit belongs. Individual institutions must determine how unit levels apply to units other than those standard undergraduate, masters, and doctoral programs. The unit levels procedure enters and maintains the available set of unit levels that can be used to define unit versions

Each unit level can be assigned a weighted average mark weighing factor. This factor can act as a default value, which can be overridden, if weighted average marks are used elsewhere in the system. For example, the value 1 can refer to a unit in year 1 of an undergraduate degree program. Level 5 can refer to a unit in year 1 of a master's degree program. This does not preclude students taking a level 2 unit in the third year of a program.

Unit Internal Program Levels

Some institutions use a weighting system, applied to study units, to model resource allocation to their organizational units. The term, unit internal program level, refers to an attribute assigned to a unit for internal institution purposes in cases where the value is determined according to the type and year level of the program undertaken.

The example in the following table describes an application of the weighting system. The table describes the grouping of units in terms of program level for Weighted Effective Full-Time Student Units (WEFTSU) when the following is true:

$$\text{WEFTSU} = \text{EFTSU} * \text{discipline.funding_index} * \text{unit_course_level.factor}$$

The following table describes an example of the weighting system.

Table 8–45 Unit Internal Program Levels Example

Level	WEFTSU
YEAR 1 & 2 UG COURSEWORK	1.0
OTHD COURSEWORK	1.2
HONS & HD COURSEWORK	1.4
RESEARCH	1.8
LEVEL UNKNOWN	1.0

Program Unit Levels

As units can be associated with different types of programs, a unit level can be assigned to a unit version for each program type with which it is associated. The program unit levels procedure assigns unit levels to a unit version to identify the year level of a program with which the unit is associated.

For example, a unit HJ13012, Social Science Research Methods, may be taken as a third year subject in the Bachelor of Arts in Justice Administration but as a first year subject in the Master of Criminal Justice. This unit could have a program unit level of 3 in the undergraduate degree and 5 in the masters degree.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Levels window

Steps

1. Query unit.
2. Enter data in each field of the window as described in the table. Save your work.

Table 8–46 Unit Levels Window Description

Field Name	Type	Features	Description
Unit Level	Required		<p>Unit level</p> <p>Note: Alphabetic or numeric unit level codes can be used but not both. Unit level codes must be in ascending order from lowest unit level to highest, such as 1, 2, 3, 4 or A, B, C, D.</p> <p>Note: If a program attendance mode is assigned to a unit version it cannot be deleted.</p> <p>Note: If a unit level is assigned to a unit version, only the description and the weighted average mark weighting can be modified. Oracle Corporation does not recommend this unless the change in the description is minor and does not affect the meaning of the unit level.</p>
Description	Required		Unit level description
Weighted Average Mark Weighting	Optional	drop-down list	Weighting of unit level for the purpose of weighted average mark calculation
Closed	Optional	Check box	If selected, prevents further use of a unit level

8.10.3 Setting Up Unit Modes IGSPS044

Unit modes are assigned to unit classes to describe the way the class is to be presented to the students. Every institution-defined unit mode must be mapped to a system unit mode that is recognized by the system for other functionality.

The unit modes procedure provides for institution-Required flexibility by permitting classification at a more detailed level and the use of unit mode names specific to the institution.

Examples of unit mode types in Oracle Student System include the following:

- on campus
- off campus
- composite

Any institution-defined unit modes can be mapped to the system unit modes, or the set of unit modes can be identical to the set of system unit modes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Modes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–47 Unit Modes Window Description

Field Name	Type	Features	Description
Unit Mode	Required		Mode of teaching the unit; on-campus, off-campus Note: If a unit mode is used in the definition of a unit class, it cannot be deleted. If a unit mode is assigned to a unit class, only the description can be modified. It is preferable to create a new unit mode if the changes in the description are substantial.
Description	Required		Unit mode description
System Unit Mode	Required	drop-down list	System-defined unit mode; can be On, Off, or Composite; defaults to On
Closed	Optional	Check box	If selected, prevents further use of a unit mode

8.10.4 Setting Up Unit Categories IGSPS041

The unit categories procedure enters and maintains the set of institution-defined unit categories. Unit categories are a means of classifying and logically grouping unit versions that have like characteristics. Institutions are able to exercise maximum flexibility in the choice of category names and the characteristics used for grouping units. The assignment of unit categories to unit versions is Optional.

Unit categories can be used for specific purposes within the Statistics subsystem. For example, an institution can have a requirement that all students must complete a unit that provides basic computer literacy. A category CL is created and assigned to qualifying units to indicate that they are part of the set of units that result in basic computer literacy. Units in this category can be used for progression purposes.

The following table describes an example of unit categories mapped to qualifying units.

The unit categories procedure enters and maintains the set of unit versions

Table 8–48 Unit Categories Example

Unit Category	Description
CL	Basic Computer Literacy

belonging to the category selected in the Unit Categories window. Unit versions can be added to or removed from a category as Required.

For example, to use the CL unit category example described in the Maintaining Unit Categories section, units drawn from a number of disciplines can be assigned to the unit category CL > Basic Computer Literacy.

The following table describes an example of unit versions mapped to unit categories.

Table 8–49 Unit Categorization Example

Unit Code	Version Number	Short Title
MAT101	3	Introduction to Computing for Mathematics
BUS132	7	Basic Computing for Business Students
ENG114	5	Introduction to Engineering Computing

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Categories > Unit Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–50 Unit Categories Window Description

Field Name	Type	Features	Description
Unit Category	Required		Unit category name Note: A unit category assigned to a unit version cannot be deleted, however, description can be modified. It is preferable to create a new unit category if the changes in the description are substantial.
Description	Required		Unit category description
Closed	Optional	Check box	If selected, prevents further use of a unit category
Unit Categorizations Region			
[Data Coordination Check box]	Optional	Check box	If selected, data in the Unit Categorizations region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Categorizations region is refreshed only when the user navigates to the Unit Code field in the Unit Categorizations region. Leave deselected to speed up performance when querying records.
Unit Code	Required	List of values	Unique code of unit that belongs to the unit category defined
Version Number	Display only		Unit version number
Short Title	Display only		Unit short title

8.10.5 Setting Up Unit Classes IGSPS045

A unit class is an attribute of a unit section that may function as a high-level time marker or as a unit section number.

Examples of high-level time markers include Day and Evening.

Examples of unit section markers include 50, A1, or 30Z.

The unit classes procedure creates the institution-defined set of unit section numbers or unit high-level time markers, depending on the profile option selected.

Prerequisites

Unit Modes IGSPS044

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Classes > Unit Classes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–51 Unit Classes Window Description

Field Name	Type	Features	Description
Unit Class	Required		Unit class Note: A unit class defining a unit cannot be deleted and only the description can be modified.
Description	Required		Unit class description
Unit Mode	Required	List of values	Unit mode
Closed	Optional	Check box	If selected, prevents further use of a unit class Note: A closed unit class cannot be reopened if it is mapped to a closed unit mode.

8.10.6 Setting up Unit Internal Program Levels IGSPS046

Use this procedure to create a unit internal program level, perform the following steps.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Internal Program Levels > Unit Internal Program Levels

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–52 Unit Internal Program Levels Window Description

Field Name	Type	Features	Description
Unit Internal Program Level	Required		Unit program type level Note: If a unit internal program level is used in the definition of a unit version, it cannot be deleted and only the description and Weighted Effective Full Time Student Units Factor (WEFTSUF) can be modified. It is preferable to create a new unit internal program level if the changes in the description are substantial.
Description	Required		Unit internal program level description
Weighted Effective Full Time Student Units Factor	Required		Factor determining weighted effective full time student units
Closed	Optional	Check box	If selected, prevents further use of a unit internal program level

8.10.7 Setting Up Unit Program Type Level IGSPS108

The unit program type level indicates the program type to which a unit can be applied. A user can define a unit program type level code to represent a program type or multiple program types.

The program type level to which a unit can be applied is defined in the code field. Users can delete unit program types only when unit program type levels are not associated with any unit.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Program Type Level window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–53 Unit Program Type Level Window Description

Field Name	Type	Features	Description
Code	Required		Unit program type level code
Description	Required		Unit program type level description
Closed	Optional	Check box	If selected, prevents further use of unit program type level

8.10.8 Setting Up Basic Unit Details IGSPS047

Unit versions represent a history of changes made to a unit's attributes. Institutions create unit versions when making minor changes to a unit. Institutions create new units for major changes. Each unit or unit version is defined by numerous attributes.

Students are enrolled in particular unit versions.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–54 Basic Unit Details Window Description

Field Name	Type	Features	Description
Unit Code	Required		Unit unique code
Version Number	Default, display only		Unit version number; new unit is assigned version number of 1 when record is saved; when creating a new version of the same unit, the system automatically assigns the next ascending number
Curriculum ID	Display only		Unique identifier of curriculum attached to the unit version
Title	Required		Unit name; for example, Introduction to Computer Science
Subtitle	Optional		Unit subtitle; can be a secondary title
Modify Subtitle at Unit Section Level	Optional	Check box	<p>If selected, allows subtitle to be modified at unit section level</p> <p>Note: Subtitles are modified in the case of repeatable units. For example, a student enrolls in a unit titled Independent Study. The student's focus is the French Revolution; the unit's subtitle becomes French Revolution. The following year, the same student enrolls again in the Independent Study unit, this time to focus on France during World War II. The unit's subtitle now is WW II France.</p>
Unit Status	Required	List of values	<p>Unit status; can be Active, Inactive, or Planned</p> <p>Note: Users cannot delete records if unit status is Active or Inactive. Users cannot change unit status from Active or Inactive to Planned. Users can change a unit status of Planned to Active or Inactive.</p>
Start Date	Required	Calendar	Unit version start date; defaults to system date
Review Date	Optional	Calendar	Unit version review date
Approval Date	Optional	Calendar	Approval date for unit inclusion in curriculum. This can be an internal or external approval.
Expiry Date	Optional	Calendar	<p>Expiration date; date when unit is no longer available for student enrollment</p> <p>Note: Students already enrolled remain enrolled.</p>

Table 8–54 Basic Unit Details Window Description

Field Name	Type	Features	Description
End Date	Optional	Calendar	Unit version's end date; must be left blank when creating new unit version Note: End date is entered only for inactive unit versions. Note: A unit's end date must be greater than or equal to the expiration date if an expiration date is set.
Short Title	Required		Short version of unit name or description
Override Title	Optional	Check box	If selected, allows override of title at the unit section level
Abbreviation	Required		Abbreviated version of unit name or description
Unit Level	Required	List of values	Unit level, for example, First Year of Study, Second Year of Study, Fifth Year and Beyond, or Higher Degree of Study
Cross-Listed	Display only	Check box	Automatically selected if unit version is included in cross-listed unit group in the Cross-Listed Units Groups window
Unit Internal Program Level	Optional	List of values	Unit internal program level and description; for example, First and Second Year of Study, Other, or Higher Degree
Organizational Unit	Required	List of values	Organizational unit responsible for the unit version
[Start Date]	Display only		Organizational unit start date
[Description]	Display only		Description of organizational unit
Coordinator	Required	List of values	Coordinator's person number and name
Find Person icon		Icon	Opens Find Person window; enables query by person details
Last Calendar Offered	Display only		Calendar year when the unit version was last offered Note: Automatically updated when the Update Last Offered and Enrolled concurrent process is run.
Last Calendar Enrolled	Display only		Calendar year when students last enrolled in the unit version Note: Automatically updated when the Update Last Offered and Enrolled concurrent process is run

Table 8–54 Basic Unit Details Window Description

Field Name	Type	Features	Description
Unit Program Type Level	Required	List of values	Unit level in a program type; for example, it can be offered at the graduate level or undergraduate level
Supplemental Exams	Optional	Check box	If selected, indicates that students enrolled in the unit are subjected to supplementary assessment, in addition to normal assessment Note: This check box overrides the Supplemental Exams Permitted check box in the Basic Program Details window.
Industrial	Optional	Check box	If selected, indicates unit has a government industrial code
Auditable	Optional	Check box	If selected, indicates that unit section is auditable.
Permission to Audit	Optional	Check box	If selected, indicates permission to audit Note: Enabled only if Auditable check box is checked.
Assessable	Optional	Check box	If selected, indicates that unit is subject to academic assessment
Enrollment Method Types region			
Voice Response	Optional	Check box	If selected, enables interactive voice response enrollment Note: This functionality is not available for this release.
Self Service Enrollment	Optional	Check box	If selected, enables self service enrollment where students can directly enrol through internet
Special Permission	Optional	Check box	If selected, indicates unit requires special permission to override unit maximum seat limits and unit rule restrictions
Research	Optional	Check box	If selected, indicates unit is research unit, as defined by institution
Superior Unit	Optional	Check box	If selected, sets up unit as superior to other units in unit hierarchy
Award Program Only	Optional	Check box	If selected, indicates completion of unit results in award, such as diploma or certificate. Selection also indicates that enrollment is open to award programs only.
Subordinate Unit	Optional	Check box	If selected, sets up unit as subordinate to other units in unit hierarchy

Table 8–54 Basic Unit Details Window Description

Field Name	Type	Features	Description
Practical	Optional	Check box	If selected, indicates unit has a government practical experience code
Reenroll for Credit Allowed	Optional	Check box	If selected, enables reenrollment for the unit version and receive academic credit
Exclude From Self Service Display	Optional	Check box	If selected, prevents unit from display in self service
[Descriptive Flexfield]	Optional		User-customization field
Anonymous Unit Grading	Optional	Check box	If selected, enables anonymous unit grading Note: This option can be disabled at the unit section level.
Anonymous Assessment Grading	Optional	Check box	If selected, enables anonymous assessment grading Note: This option can be disabled at the unit section level.
Other Unit Details		Button	Displays buttons to enter additional unit details

8.10.9 Setting Up Basic Unit Details Planned to Active IGSPS047

Institutions define unit statuses, such as Current, Pending, or Closed. All unit statuses must be mapped to a system unit status.

The table below describes system unit statuses.

Table 8–55 System Unit Statuses

System Unit Status	Description
Active	Can be changed to Inactive only Status cannot be changed to Active if inactive or planned superior units exist Only one version of an active unit and unset expiration date can exist

Table 8–55 System Unit Statuses

System Unit Status	Description
Inactive	<p>Can be changed only to Active; system checks related unit offerings and displays warning if closed or missing reference data is found; correct data must be entered before status becomes Active, or new version must be created</p> <p>Status cannot be changed to Inactive if active or planned subordinate units exist</p> <p>Unit status can be changed to Inactive only when end date is entered</p> <p>Details of inactive unit version cannot be modified</p>
Planned	<p>Details have been recorded, but unit is awaiting official approval and a change to Active status</p> <p>Can be changed only to Active or Inactive</p> <p>In order to move the unit from a planned status to an active status, the following elements are needed:</p> <ul style="list-style-type: none"> ■ Teaching Responsibility ■ Unit Discipline ■ Unit Grading SchemaUnit Credit Points and Hours

Set basic unit details to active in the Basic Unit Details window. See Setting Up Basic Unit Details IGSPS047 for more information.

8.10.10 Setting Up Basic Unit Details - Create Occurrence IGSPS047

Prerequisites

Units must be in ACTIVE status.

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.

The Unit Section Details window appears.

3. Click Occurrences.

The Unit Section Occurrences window appears.

4. Enter your details and save your work.

8.10.11 Setting Up Basic Unit Details - Teaching Responsibility IGSPS048

Typically, a unit version has one, or at a maximum two, responsible organizational units. In the teaching responsibility procedure, responsibility for teaching a unit version can be assigned, modified, or deleted.

When certain conditions exist, the Unit Teaching Responsibilities window displays the same unit as the context record. Additionally, any existing teaching responsibility records relating to this record are displayed. The conditions are as follows:

- A unit is displayed in the Basic Unit Details window.
- Other Unit Details is clicked.
- Teaching Responsibility is clicked.

The Teaching Responsibilities region of the Teaching Responsibilities window is used to enter the organizational unit or units responsible for teaching a unit version.

An organizational unit is typically a faculty, school, or center. For example, a unit AAC131, Perspectives in Music, can be entered as the responsibility of an organizational unit 0404, School of Performing Arts.

Prerequisites

Organizational Units IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.

- 3. Click Teaching Responsibility.
The Teaching Responsibilities window appears.
- 4. Enter data in each field of the Teaching Responsibilities window as described in the table.
- 5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–56 Teaching Responsibilities Window Description

Field Name	Type	Features	Description
Unit Code	Required	List of values	Unit version unique identifier
Version Number	Display only		Unit version number
Unit Status	Display only		Unit version status; can be Planned, Active, or Inactive
Title	Display only		Unit version title; for example, Introduction to Computer Science, Art Appreciation
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Teaching Responsibilities region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Teaching Responsibilities region is refreshed only when the user navigates to the Organizational Unit Code field in the Teaching Responsibilities region. Leave deselected to speed up performance when querying records.
Teaching Responsibilities Region			
Organizational Unit Code	Required	List of values	Code of organizational unit responsible for teaching the unit Note: Only active organizational unit codes are displayed for selection.
Organization Start Date	Display only		Organizational unit start date
Description	Display only		Organizational unit description
[Percentage]	Required		Percentage of unit version teaching responsibility assigned to the organizational unit Note: The total percentage of responsibility assigned to organizational units for a unit version must equal 100

8.10.12 Setting Up Unit Grading Schemas IGSPS077

A grading schema describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist for an institution.

The unit grading schemas procedure assigns grading schemas to a unit.

More than one grading schema can be assigned to a unit in the Unit Grading Schemas window.

Note: Only the grading schema setup here will be available at the unit section level.

Prerequisites

Grading Schemas IGSAS025

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
The Other Unit Details Region appears.
3. Click Unit Grading Schemas.
The Unit Grading Schemas window appears.
4. Enter data in each field of the Unit Grading Schemas window as described in the table.
5. Save or save and continue as follows:

File > Save or Save and Proceed

Table 8–57 Unit Grading Schemas Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit code
Unit Version	Default display only		Unit version number
Unit Status	Default display only		Unit status; active, inactive, planned
Unit Title	Default display only		Unit title
Unit Grading Schemas Region			
Schema Code	Required	List of values	Grading schema code
Schema Version	Display only		Grading schema version number
Schema Description	Display only		Grading schema description
Default	Optional	Check box	If selected, indicates default grading schema
Back		Button	Returns users to Basic Unit Details window

8.10.13 Setting Up Unit Discipline IGSPS049

The unit disciplines procedure defines the discipline groups to which a unit version belongs. A unit version can belong to several institution-defined unit disciplines. Typically, most unit versions are not assigned to more than one or two unit disciplines.

Unit versions are classified into discipline groups for statistical reporting and institution purposes.

When certain conditions exist, the Unit Disciplines window displays the same unit version as the context record. Additionally, any existing unit disciplines relating to this record are displayed. The conditions are as follows:

- A unit is displayed in the Basic Unit Details window.
- Other Unit Details is clicked.
- Unit Discipline is clicked.

Prerequisites

Disciplines IGSPS040

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. The Basic Unit Details window appears.
2. Query the appropriate record.
3. Click Other Unit Details to display other unit details buttons.
4. In Other Unit Details region, click Unit Discipline.
The Unit Disciplines window appears.
5. Enter data in each field of the Unit Disciplines window as described in the table.
6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–58 Unit Disciplines Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit code
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit status; Active, Inactive, or Planned Note: Users cannot alter discipline groups if unit status is Inactive.
Title	Default display only		Unit title
Unit Disciplines Region			

Table 8–58 Unit Disciplines Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in Unit Disciplines region is automatically refreshed and coordinated with data in the header region; if deselected data in Unit Disciplines region is refreshed only when users navigate to Discipline Group field in Unit Disciplines region. Leave deselected to speed up performance when querying records.
Discipline Group	Required	List of values	Discipline group code Note: This field is protected against update. Therefore, it is not possible to modify existing records in this window unless a record is added or deleted. In that case, it is possible to adjust percentages.
Description	Display only		Discipline group description
%	Required	List of values	Percentage of unit version allocated to a discipline Note: If the unit version belongs to only one discipline, enter 100 in the% field. If the unit version belongs to more than one discipline, enter the proportional percentage of the unit version allocated to this discipline. The total percentage of unit disciplines assigned to a unit version must equal 100.

8.10.14 Setting Up Unit Fields of Study IGSPS074

The Fields of Study window creates institution-defined fields of study. The unit fields of study procedure assigns a field of study to a unit.

Prerequisites

Fields of Study IGSPS004

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.

The Other Unit Details region appears.

3. Click Unit Fields of Study.

The Unit Fields of Study window appears.

4. Enter data in each field of the Unit Fields of Study window as described in the table.

5. Save or save and continue as follows:

File > Save or Save and Proceed

Table 8–59 Unit Fields of Study Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit code
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit status; Active, Inactive, Planned
Title	Default display only		Unit title
Unit Fields of Study Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Fields of Study region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Fields of Study region is refreshed only when users navigate to the Field of Study field in the Unit Fields of Study region. Leave deselected to speed up performance when querying records.
Field of Study	Required	List of values	Field of study code Note: Users cannot assign fields of study to inactive units.
Field of Study Description	Display only		Field of study description; for example, chemistry, computer science

Table 8–59 Unit Fields of Study Window Description

Field Name	Type	Features	Description
Government Field of Study	Display only		Government field of study code
Government Field of Study Description	Display only		Government field of study description
Back		Button	Returns users to Basic Unit Details window

8.10.15 Setting Up Program Unit Levels IGSPS050

As units can be associated with different types of programs, a unit level can be assigned to a unit version for each program type with which it is associated. The program unit levels procedure assigns unit levels to a unit version to identify the year level of a program with which the unit is associated.

For example, a unit HJ13012, Social Science Research Methods, may be taken as a third year subject in the Bachelor of Arts in Justice Administration but as a first year subject in the Master of Criminal Justice. This unit could have a program unit level.

Prerequisites

Program Types IGSPS001

Unit Levels IGSPS043

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
3. Click Program Unit Level.
The Program Unit Levels window appears.
4. Enter data in each field of the Program Unit Levels window as described in the table.
5. Save or save and continue as follows:

File > Save or Save and Proceed

Table 8–60 Program Unit Levels Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit version number
Unit Status	Default, display only		Unit status; can be Active, Inactive, or Planned Note: Program unit levels cannot be altered if the unit status is Inactive.
Title	Default, display only		Unit title
Program Unit Levels Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Program Unit Levels region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Program Unit Levels region is refreshed only when users navigate to the Program Type field in the Program Unit Levels region. Leave deselected to speed up performance when querying records.
Program Type	Required	List of values	Program type Note: Program type must not be Closed.
Description	Display only		Program type description
Unit Level	Required	List of values	Unit level to be associated with a unit version and program type Note: A unit level or unit version relationship cannot be deleted if it is used elsewhere in the system. For example, if students are enrolled in the unit version and program type, it is unlikely that a unit level associated with a unit version would change for a given program type. It is more likely that a new unit version is created. Users are advised to make changes in this window only to amend incorrectly entered data. Note: Unit level must not be closed.
Weighted Average Mark Weighting	Optional		Factor determining weighted effective full time student units

8.10.16 Setting Up Sub-Unit Relationships IGSPS051

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
3. Click Sub-unit Relationship
The Sub-Unit Relationships window appears.
4. Enter data in each field of the Sub-Unit Relationships window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–61 Sub-Unit Relationships Window Description

Field Name	Type	Features	Description
Superior Unit Versions Region			
Unit Code	Required	List of values	superior unit unique identifier Note: Superior unit versions can be created only if Superior Unit is checked in the Basic Unit Details window.
Version Number	Display only		superior unit version number
Title	Display only		Superior unit version title; for example, Introduction to Computer Science, Art Appreciation

Table 8–61 Sub-Unit Relationships Window Description

Field Name	Type	Features	Description
Unit Status	Display only		Unit version status; can be Planned, Active, or Inactive Note: A planned unit version cannot be the superior of an active unit version
Creation Date	Display only		Date of creation of unit version; defaults to system date
Deletion Date	Optional		Date of deletion of superior unit version
Award Credit Points On Superior Unit Completion	Optional	Check box	If selected, allots credit points on completion of superior unit
Unit Version Region			
Unit Code	Default display only		Unit unique identifier
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit version status; can be Planned, Active, or Inactive
Title	Default display only		Unit version title; for example, Introduction to Computer Science, Art Appreciation
Include Deleted Relationships	Optional	Check box	If selected, displays details of deleted unit version relationships
Subordinate Unit Versions Region			
Unit Code	Required	List of values	Subordinate unit unique identifier Note: Subordinate unit versions can be created only if Subordinate Unit is checked in the Basic Unit Details window.
Version Number	Display only		Subordinate unit version number
Title	Display only		Subordinate unit version title; for example, Introduction to Computer Science, Art Appreciation
Unit Status	Display only		Unit version status; can be Planned, Active, or Inactive Note: An active unit version cannot be the subordinate of a planned unit version

Table 8–61 Sub-Unit Relationships Window Description

Field Name	Type	Features	Description
Creation Date	Display only		Date of creation of unit version; defaults to system date
Deletion Date	Optional		Date of deletion of unit version
Award Credit Points On Subordinate Unit Completion	Optional	Check box	If selected, allots credit points on completion of subordinate unit

8.10.17 Setting Up Unit Categorizations IGSPS052

The unit categorizations procedure allocates unit categories to unit versions. The Unit Version region of the Unit Categorizations window displays the current unit version record from the Basic Unit Details window. The displayed records in the Unit Categorizations region are the unit categories that have been assigned to the context record.

For example, when a unit is displayed in the Basic Unit Details window and Other Unit Details is clicked, and then Unit Categorization is clicked, this window displays the same unit as the context record and any existing categories to which the unit belongs.

The Unit Categorizations region of the Unit Categorizations window is used to assign units to membership in unit categories. Unit categories are entered and maintained in the Unit Categorizations window. Unit categories can be assigned to unit versions to group them according to like characteristics. The selection and naming of unit categories is a matter for individual institutions and users, and their assignment to unit versions is Optional. A unit version can be associated with any number of unit categories.

Note: Unit categories can be used for specific purposes within the Statistics subsystem. Documentation of this in Statistics Subsystem Data Prerequisites must be reviewed when setting up this subsystem.

For example, an institution might have a requirement that all students complete a unit providing basic computer literacy. A category CL, or any other code, could be created in the Unit Categorizations window and assigned to the displayed unit to indicate that it is part of the set of units resulting in basic computer literacy. Units in this category could then be used for progression purposes.

Prerequisites

Unit Categories IGSPS041

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
3. Click Unit Categorization.

The Unit Categorizations window appears.

4. Enter data in each field of the Unit Categorizations window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–62 Unit Categorizations Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit version code
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit version status; can be Active, Inactive, or Planned
Title	Default display only		Unit version title
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Categorizations region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Categorizations region is refreshed only when users navigate to the Unit Category field in the Unit Categorizations region. Leave deselected to speed up performance when querying records.

Table 8–62 Unit Categorizations Window Description

Field Name	Type	Features	Description
Unit Categorizations Region			
Unit Category	Required	List of values	Unit category associated to the unit version Note: Unit categories cannot be altered for inactive units.
Description	Required		Unit category description

8.10.18 Setting Up Unit Reference Codes IGSPS053

In Student System, each unit is identified by a unit code and version number. Alternative reference codes can be used to associate institution-defined details with these unit versions.

For example, an interactive voice response, or IVR, system uses numerical codes to identify units. In Oracle Student System, the same unit is represented by an alphanumeric unit code and a version number. In the Unit Reference Codes window, the IVR code is assigned to the unit code and version number to link the two systems.

The reference code types are defined in the Reference Code Types window. If the Unit is selected as an Applicable level and the Mandatory check box for a reference code type is selected in the Reference Code Types window, the default reference code type is automatically attached to the unit. Such reference codes are displayed as General Unit Reference codes in the Unit Reference Codes window. The reference codes that are assigned manually are displayed as Unit Requirements Reference codes.

Prerequisites

Reference Code Types IGSPS011

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.

2. Click Other Unit Details.
The Other Unit Details region appears.
3. Click Unit Reference Code.
The Unit Reference Codes window appears.
4. Enter data in selected fields of the Unit Reference Codes window as described in the table
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–63 Unit Reference Codes Window Description

Field Name	Type	Features	Description
Unit Reference Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Reference region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Reference region is refreshed only when users navigate to the Reference Code Type field in the Unit Reference Codes region. Leave deselected to speed up performance when querying records.
Exclude from Record	Optional	Check box	If selected, credits earned for the unit are not considered for student progression
Unit Reference Codes Region			
General Unit Reference Codes Tab			
Reference Code Type		List of values	Reference code type
Description	Display only		Reference code type description
Reference Code	Display only		Reference code associated to the reference code type
Description	Display only		Reference code description
Unit Requirements Reference Codes Tab			

Table 8–63 Unit Reference Codes Window Description

Field Name	Type	Features	Description
Reference Code Type		List of values	Reference code type
Description	Display only		Reference code type description
Reference Code	Required	List of values	Reference code associated to the reference code type; displays the default reference code set in Reference Code Types window.
Description	Display only		Reference code description
Back		Button	Returns users to Basic Unit Details window

8.10.19 Setting Up Unit Subtitles IGSPS109

Priorities and preferences are defined in the Unit Subtitles window with a percentage for reserved seating at the organizational unit level. The reserved seating priority and preference data set up by this form is inherited by all units and unit sections offered by that unit.

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Subtitle window

Steps

1. The Find Unit window appears. Query appropriate record.
 The Unit Subtitle window appears.
2. Enter data in each field of the window as described in the table.
3. Save your work.

Table 8–64 Unit Subtitle Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit version number
Unit Status	Default, display only		Institution-defined unit status; Active, Inactive, Planned
Title	Default, display only		Unit title
Unit Subtitle Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Subtitle region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Subtitle region is refreshed only when users navigate to the Subtitle field in the Unit Subtitle region. Leave deselected to speed up performance when querying records.
Subtitle	Required		Unit subtitle
Approved	Optional	Check box	If selected, indicates that a subtitle is approved by an institution or an organizational unit
Closed	Optional	Check box	If selected, prevents further use of subtitle

8.10.20 Setting Up UK Statistics IGSHE014- Unit Tab

Unit related data required for reporting to HESA that is not captured in Student System is manually entered in the Unit tab of the UK Statistics window. Data must be recorded for each unit reported in the module return for a valid module return to be generated.

Prerequisites

IGS: Country Code profile option set to United Kingdom

Responsibility

Oracle Student System Super User

Navigation

Navigate to the Basic Unit Details window as follows:

Program Structure and Planning > Basic Unit Details

The Find Units window appears.

Enter search criteria to find the required unit.

Click Find.

Click Other Unit Details.

The Basic Unit Details window appears.

Click UK Statistics.

The UK Statistics window appears.

Steps

Enter data in each window as described in the following table. Save your work.

Table 8–65 UK Statistics Window Description, Unit Tab

Field Name	Type	Features	Description
Unit Code	display only		unit version code and description
Credit Transfer Scheme	optional	list of values	credit transfer scheme
Module Length	optional		module length
Proportion of Teaching in Welsh	optional		percentage of teaching in Welsh
Proportion of FTE	optional		full time equivalence percentage
Version Number	display only		unit version number
Location	optional	list of values	location where unit taught
Unit Cost Centers Region			
Cost Center	optional		cost center reporting to HESA
Description	display only		cost center description
Subject	conditionally required	list of values	HESA subject code; required if cost center entered

Table 8–65 UK Statistics Window Description, Unit Tab

Field Name	Type	Features	Description
Description	display only		subject description
Proportion	conditionally required		percentage of teaching allocated to cost center and subject code combination
Back		button	closes UK Statistics window and returns to Basic Unit Details window

8.10.21 Setting Up Unit Locations and Facilities IGSPS081

The unit location and facilities procedure assigns a location, media, and equipment needed for instruction to a unit.

Codes representing locations where a unit is offered are set up in the Locations window.

In the Media and Equipment window, codes representing media and other instructional equipment in a classroom, such as televisions, computers, video cassette recorders, microphones, white boards, and podiums, are entered.

These codes are used in the Facilities tab of the Unit Locations and Facilities window to enter media and equipment needed for unit instruction.

The following information applies to this procedure:

- A location, media, and equipment cannot be assigned to an inactive unit.

Prerequisites

Organizational Units IGSOR030

Media and Equipment IGSPS080

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.

2. Click Other Unit Details.
3. Click Location and Facilities.
The Unit Locations and Facilities window appears.
4. Enter data in appropriate fields.
5. Save or save and continue as follows:
File > Save or Save and Proceed
6. Optionally, go to the Facilities tab and enter data in appropriate fields.

8.10.22 Setting Up Curriculum Units IGSPS104

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Curriculum window

Steps

1. Enter data in appropriate fields.
The following information applies to this step:
The value entered in the Curriculum ID field must be unique.
Note: This value might be system generated if the profile option is set for system generated.
2. Users can optionally query, insert, update, and delete in the Unit Code field.
3. Save or save and continue as follows:
File > Save or Save and Proceed

8.10.23 Setting Up Unit Version Notes IGSPS054

Users attach additional information in the form of notes to unit versions in the Unit Version region of the Basic Unit Details window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Version Notes.
The Unit Version Notes window appears.
3. Enter data in each field of the Unit Version Notes window as described in the table.
4. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–66 Unit Version Notes Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit code
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit status; Active, Inactive, Planned
Title	Default display only		Unit title
Unit Version Notes Region			

Table 8–66 Unit Version Notes Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Version Notes region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Version Notes region is refreshed only when users navigate to the Program Note Type field in the Unit Version Notes region. Leave deselected to speed up performance when querying records.
Unit Note Type	Required	List of values	Note type attached to the unit version
Description	Display only		Note type description
Edit Note		Button	Opens Text Notes window to edit notes

8.10.24 Setting Up Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.11 Unit Offering

A unit offering is created by assigning a unit version to a calendar type. Units can be offered only in active calendar types of the Teaching calendar category. A list of values containing only these calendar types appears in the Calendar Type field. A unit version can be offered in more than one calendar type.

After creating a unit offering, specific occurrences of the offering, or unit offering patterns, can be defined by specifying the particular calendar instance in which the unit version is offered. Students enroll in unit sections of unit

8.11.1 Setting Up Unit Offering IGSPS055

A unit offering is created by assigning a unit version to a calendar type. Units can be offered only in active calendar types of the Teaching calendar category. A List of values containing only these calendar types appears in the Calendar Type field. A unit version can be offered in more than one calendar type.

The Maximum Students Per Waitlist field is defaulted with the value set at the organization level if at all any exists. You can override the defaulted value.

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Offering.
The Unit Offerings window appears.
3. Enter data in each field of the Unit Offering window as described in the table.
4. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–67 Unit Offerings Window Description

Field Name	Type	Features	Description
Unit Code	optional	list of values	Unit code
Version Number	default, display only		Unit version number
Unit Status	default, display only		Unit status
Title	Default, display only		Unit title
Unit Offerings region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the footer region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Unit Offerings and Unit Offering Patterns regions. Select to speed up performance when querying records.
Calendar Type	Required	List of values	Institution-defined calendar type
Description	Default, display only		Calendar type description
Calendar Closed	Optional	Check box	If selected, prevents further use of a calendar type Note: Unit offerings cannot be assigned to closed calendar types, however, a query can display unit offerings assigned to close calendar types. Note: If a unit offering has dependent children records, it cannot be deleted.
Unit Offering Notes		Button	Open Unit Offering Notes window
Unit Offering Patterns region			
Alternate Code	Optional	List of values	Alternate unit offering code Note: A unit offering can have numerous unit offering patters. Unit offering patterns cannot be modified. Note: If a unit offering pattern has dependent child records, it cannot be deleted.
Start Date	Display only		Unit offering start date

Table 8–67 Unit Offerings Window Description

Field Name	Type	Features	Description
End Date	Display only		Unit offering end date
Calendar Status	Display only		<p>Institution-defined calendar status</p> <p>Note: Units can be offered only in active calendar instances.</p> <p>Note: Changing calendar status to Inactive makes the unit offering instance inactive, preventing new offering patterns from being assigned to them, and students from enrolling in them.</p>
Waitlist Allowed	Optional	Check box	<p>If selected, indicates that waitlist is allowed for a unit offering; enabled only if Waitlist Allowed is checked for the calendar and associated organizational unit in the Organizational Unit Waitlist Setup window.</p> <p>Note: Users cannot deselect this checkbox once a student is waitlisted. This checkbox is disabled once the maximum number of students allowed for waitlist is attained.</p>
Maximum Students Per Waitlist	Display only		Maximum students waitlisted in a unit offering
Unit Assessment Items	Optional	Button	Opens the Unit Assessment Items window
Unit Offering Pattern Notes	Optional	Button	Opens Unit Offering Pattern Notes window
Unit Sections	Optional	Button	Opens Unit Sections window
Unit Offering Pattern Waitlist	Optional	Button	Opens Unit Offering Pattern Waitlist window
Unit Offering Pattern Reserved Seating	Optional	Button	Opens Unit Offering Pattern Reserved Seating window

8.11.2 Setting Up Unit Offering Pattern Notes IGSPS057

After creating a unit offering, specific occurrences of the offering, or unit offering patterns, can be defined by specifying the particular calendar instance in which the unit version is offered. Students enroll in unit sections of unit offering patterns.

The Rollover Unit Offering Pattern and Unit Section concurrent process performs a bulk rollover of unit offering patterns and unit sections.

The Unit Offering Pattern Notes window is used to attach additional information to unit offering patterns in the form of notes.

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Offering.
The Unit Offerings window appears.
3. Query the appropriate record.
4. Click Unit Offering Pattern Notes.
The Unit Offering Pattern Notes window appears.
5. Enter data in each field of the Unit Offering Pattern Notes window as described in the table.
6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–68 Unit Offering Pattern Notes Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit version code
Version Number	Default display only		Unit version number
Unit Status	Default display only		Unit status; can be Active, Inactive, or Planned
Calendar Type	Default display only		Calendar type attached to the unit version

Table 8–68 Unit Offering Pattern Notes Window Description

Field Name	Type	Features	Description
Effective Dates	Default display only		Effective period of the calendar type attached to the unit version
Title	Default display only		Unit version title
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Offering Pattern Notes region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Offering Pattern Notes region is refreshed only when users navigate to the Program Note Type field in the Unit Offering Pattern Notes region. Leave deselected to speed up performance when querying records.
Unit Offering Pattern Notes Region			
Program Note Type	Required	List of values	Program note type reflecting the specific purpose of the note
Description	Display only		Program note type description
Edit Note		Button	Opens Text Notes window to edit note

8.11.3 Setting Up Unit Offering Text Notes IGSPS056

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

The Unit Offering Notes window is used to attach additional information to unit offerings in the form of notes.

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Offering.
The Unit Offerings window appears.
3. Click Unit Offering Notes.
The Unit Offering Notes window appears.
4. Enter data in appropriate fields of the Unit Offering Notes window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–69 Unit Offering Notes Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Version number of the unit
Unit Status	Default, display only		Unit status
Calendar Type	Default, display only		Calendar type
[Description]	Default, display only		Description of the calendar type
Title	Default, display only		Title of the unit
Unit Offering Notes Region			
Program Note Type	Required	List of values	Unit offering note type
Description	Default, display only		Description of the unit offering note type
Edit Note		Button	Opens Text Notes window

8.11.4 Setting Up Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.12 Unit Section

Unit Section setup includes setting up data for unit sections, including cross listing, enrollment limits, and media requirements information, among other types of data.

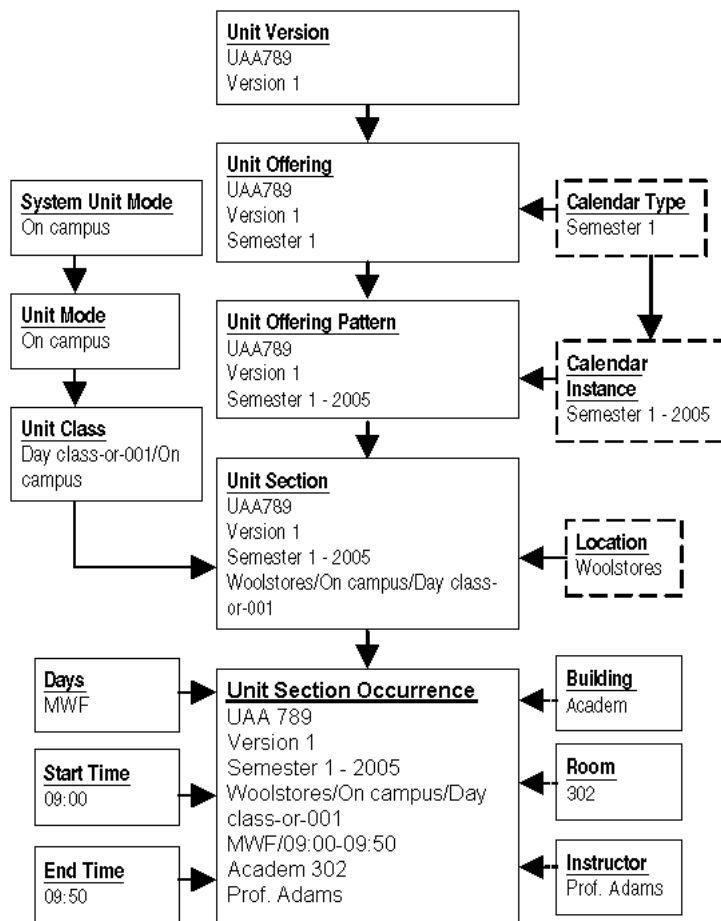
The Unit Section windows enable users to create many institution-defined elements necessary for use in Student System. Unit sections are instances of the associated unit. Users must set up these elements before they can use them in other subsystems of Student System.

The unit section elements defined and maintained in the Unit Section windows include the following:

- stages of development
- versions
- attributes
- structures
- discontinuations
- rules
- history

Relationships Required to Define Unit Sections

Figure 8–8 shows the relationships required to define a unit section and typical data values to show how the data is combined.

Figure 8–8 Relationships Required to Define Unit Sections

The example shown is typical of the data contained in Unit Offering records.



Data from other subsystems

Unit Section Rollover

To reduce the work involved in maintaining curriculum and associated data, Student System provides rollover functionality by which existing unit section information can be used to create the following new information:

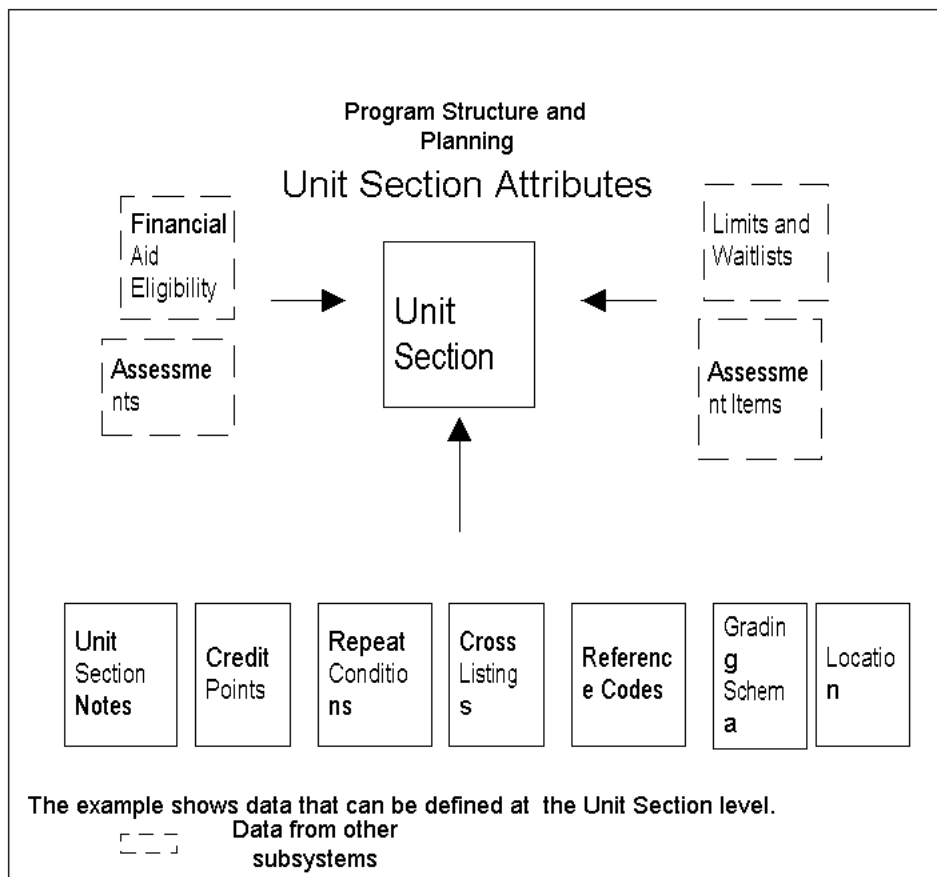
- new unit sections based on existing unit sections

Unit Section Attributes

Unit sections further define the attributes for a particular unit. For example, a unit section indicates a teaching period for a particular unit.

Figure 8–9 shows the attributes that is defined at the unit section level.

Figure 8–9 Unit Section Attributes



The attributes defined at the unit section level include the following:

- unit section notes
- credit points

- repeat conditions
- cross listings
- grading schema
- location
- financial aid eligibility
- enrollment limits and waitlists
- assessments
- assessment items

8.12.1 Setting Up Unit Sections IGSPS058

A unit section, or unit offering option, identifies a unit by its location, unit mode, which is the mode of delivery, and unit class, which is the unit section number or high-level time indicator. Unit modes are associated with unit sections indirectly; the direct association is with unit class.

The Unit Sections window displays the current program offering pattern record from the Unit Offerings window. The records displayed in the Unit Offering Options region of the Unit Sections window are the unit sections for the selected record.

You can delete unit sections with a status of Planned.

Note: After the unit section status is changed to any status other than Planned, it cannot be reset to Planned.

Prerequisites

Location IGSOR031

Unit Classes IGSPS045

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.

- 2. Click Unit Offering.
The Unit Offerings window appears.
- 3. Select a unit offering pattern.
- 4. Click Unit Sections.
The Unit Sections window appears.
- 5. Enter data in each field of the Unit Sections window as described in the table.
- 6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–70 Unit Sections Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit version number
Unit Status	Default, display only		Unit status
Title	Default, display only		Unit title
Calendar Type	Default, display only		Teaching period calendar type
Effective Dates	Default, display only		Unit section start and end dates
Unit Sections Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Unit Sections window is automatically refreshed and coordinated with data in the Unit Offerings window; if deselected, data in Unit Sections window is refreshed only when the user clicks in Unit Sections region. Leave deselected to speed up performance when querying records.
Location	Required	List of values	Unit location offered Note: To create a unit section, the system location type must be Campus.

Table 8–70 Unit Sections Window Description

Field Name	Type	Features	Description
Unit Class	Required	List of values	Unit class indicating the high-level class time or unit section
Voice Response Enrollment	Optional	Check box	If selected, indicates that the students can enroll in a unit section through an interactive voice response enrollment
Self Service Enrollment	Optional	Check box	If selected, indicates that students can enroll in a unit section through the self service enrollment facility
Exclude from Self Service Display	Optional	Check box	If selected, indicates that students cannot enroll in this unit section through the self service display facility
Offered	Optional	Check box	If selected, indicates that the unit section is approved and offered at this time
Grading Scheme Precedence	Optional	Check box	<p>If selected, indicates that the unit grading schema takes precedence over the program offering pattern grading schema</p> <p>Note: If a program offering pattern grading schema is entered, it takes precedence over the unit grading schema unless the Unit Grading Schema Precedence check box is selected.</p> <p>Note: If a program offering pattern grading schema has precedence, recommended unit attempt grades are translated from the unit grading schema to the program offering pattern grading schema by the Translate Student Unit Attempt Outcomes concurrent process.</p>
Call Number	Optional		<p>Unit section's call number</p> <p>Note: If the user profile option has been set to automatically assign call numbers, the system will automatically fill a call number. If the user profile option has been set to enter user-determined call numbers users must enter a number.</p> <p>Note: A call number must be unique within a teaching period. The same call number can be used in different teaching periods.</p> <p>Note: A call number can be any number from one to ten characters in length. If less than ten characters are used, the system does not display leading zeroes.</p>
Unit Contact	Optional		Staff number responsible for the unit

Table 8–70 Unit Sections Window Description

Field Name	Type	Features	Description
Find Person		icon	Opens Find Person window
Unit Sections Grading Schemas		Button	Opens Unit Section Grading Schemas window
Teaching Responsibility Overrides		Button	Opens Teaching Responsibility Overrides window
Unit Section Notes		Button	Opens Unit Section Notes window
Unit Section Details		Button	Opens Unit Section Details window

8.12.2 Setting Up Unit Section Grading Schemas IGSPS082

A grading schema describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist for an institution.

The unit grading schemas procedure assigns grading schemas to a unit.

More than one grading schema can be assigned to a unit in the Unit Grading Schemas window.

Prerequisites

Unit Grading Schemas IGSPS077

Grading Schemas IGSAS025

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
 The Other Unit Details Region appears.
3. Click Unit Grading Schemas.

The Unit Grading Schemas window appears.

4. Enter data in each field of the Unit Grading Schemas window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–71 Unit Grading Schemas Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit code
Unit Version	Default display only		Unit version number
Unit Status	Default display only		Unit status; active, inactive, planned
Unit Title	Default display only		Unit title
Unit Grading Schemas Region			
Schema Code	Required	List of values	Grading schema code
Schema Version	Display only		Grading schema version number
Schema Description	Display only		Grading schema description
Default	Optional	Check box	If selected, indicates default grading schema
Back		Button	Returns users to Basic Unit Details window

8.12.3 Setting Up Teaching Responsibility Override IGSPS059

The teaching responsibility overrides procedure is used when teaching responsibility details for a unit section are different from the standard unit version teaching responsibility established in the Teaching Responsibilities window.

For example, an organizational unit has teaching responsibility for a unit version on all except one campus. This procedure enters the organizational unit or units with teaching responsibility for offerings of the unit on that campus.

Prerequisites

Organizational Units IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Teaching Overrides window

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Offering.
The Unit Offerings window appears.
3. Click Unit Sections.
The Unit Sections window appears.
4. Click Teaching Responsibility Overrides.
The Teaching Responsibility Overrides window appears.
5. Enter data in each field of the Teaching Responsibility Overrides window as described in the table.
6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–72 Teaching Responsibility Overrides Window Description

Field Name	Type	Features	Description
Unit Code	Required	List of values	Unit version unique identifier
Version Number	Display only		Unit version number
Unit Status	Display only		Unit version status; can be Planned, Active, or Inactive
Title	Display only		Unit version title; for example, Introduction to Computer Science, Art Appreciation
Location			Location where unit version is offered

Table 8–72 Teaching Responsibility Overrides Window Description

Field Name	Type	Features	Description
Unit Class			Class where unit version is taught
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Teaching Responsibility Overrides region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Teaching Responsibility Overrides region is refreshed only when the user navigates to the Override Organizational Unit field in the Teaching Responsibility Overrides region. Leave deselected to speed up performance when querying records.
Teaching Responsibility Overrides Region			
Override Organizational Unit	Required	List of values	Code of organizational unit responsible for teaching the unit
Description	Display only		Organizational unit description
Organizational Unit Start Date	Display only		Start date of organizational unit
[Percentage]	Required		Percentage of unit version teaching responsibility assigned to the organizational unit Note: The total percentage of responsibility assigned to organizational units for a unit version must equal 100

8.12.4 Setting Up Unit Section Details IGSPS083

A unit section is a discrete offering option of a unit, differentiated by location, unit mode, and unit class. There can be an unlimited number of sections for each unit.

Each unit section is defined by numerous attributes that are inherited from the parent unit. Some may be modified at the unit section level. The Find Unit Sections window is used to query a specific unit section. The Unit Section Details window displays the details for the queried unit section and contains buttons that open several attribute windows.

If students are already enrolled in a unit section, the only way to change the status of that unit section is to drop the students from the section, make the status change, and then re-enter them in the unit section.

A unit section is a discrete offering option of a unit, differentiated by location, unit mode, and unit class. There can be an unlimited number of sections for each unit.

Each unit section is defined by numerous attributes that are inherited from the parent unit. Some may be modified at the unit section level. The Find Unit Sections window is used to query a specific unit section. The Unit Section Details window displays the details for the queried unit section and contains buttons that open several attribute windows.

If students are already enrolled in a unit section, the only way to change the status of that unit section is to drop the students from the section, make the status change, and then re-enter them in the unit section.

The following table contains lists of unit section statuses.

Table 8–73 Unit Section Statuses Table

Unit Section Status	Description
Cancelled	Cancelled unit section
Closed	Closed unit section
Full - Waitlist Allowed	Full unit section enrollment, waitlisting accepted
Hold	Open unit section, students on waitlist
Open	Open unit section
Planned	Planned unit section

Users cannot change the status of an Open Unit Section to Closed Unit Section if actual enrollment is greater than maximum enrollment or actual waitlist is less than maximum waitlist.

Users cannot change the status of an Open Unit Section to Full Unit Section, Accepting Waitlisting if the waitlist is defined at unit section level and waitlist is not allowed or if actual enrollment is less than maximum enrollment.

Users cannot change the status of a Closed Unit Section to Full Unit Section, Accepting Waitlisting if waitlist is defined at the unit section level and waitlist is not allowed or if actual waitlist is greater than maximum waitlist.

Users cannot change the status of a Closed Unit Section to Full Unit Section, Accepting Waitlisting if waitlist is not defined at the unit section level and waitlist is not allowed at unit level or if actual waitlist is greater than maximum waitlist.

Users cannot change the status of Full Unit Section, Accepting Waitlisting to Open Unit Section if the actual waitlist is greater than zero or actual enrollment is greater than or equal to maximum enrollment.

The following status changes are invalid.

- Canceled Unit Section to Closed Unit Section
- Canceled Unit Section to Full Unit Section, Accepting Waitlisting
- Planned Unit Section to Closed Unit Section
- Planned Unit Section to Full Unit Section, Accepting Waitlisting
- Closed Unit Section to Planned Unit Section
- Full Unit Section, Accepting Waitlisting to Planned Unit Section

Note: Users must update the Unit Section status if changes are made to Maximum Students per Waitlist and Maximum Enrollment in the Unit Section Enrollment Limits, Waitlist and Reserved Seating window.

Prerequisites

Person Details IGSAD034

Locations IGSOR031

Organizational Units IGSOR030

Reference Code Types IGSPS011

Special Requirements IGSPS062

Buildings IGSPS098

Rooms IGSPS099

Activity Types IGSPS117

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

1. To query the appropriate record, click Find.

- 2. In the Find Unit Section window, select the appropriate record.
- 3. Click OK.
The Unit Section Details window appears.
- 4. Alternatively, navigate to the Unit Section Details window as follows:
Program Structure and Planning > Basic Unit Details
The Basic Unit Details window appears.
- 5. Query the appropriate record.
- 6. Click Unit Offering.
The Unit Offerings window appears.
- 7. Click Unit Sections.
The Unit Sections window appears.
- 8. Click Unit Section Details.
The Unit Section Details window appears.
- 9. Enter data in each field of the Unit Section Details window as described in the table.
- 10. Save your work.

Table 8–74 Unit Section Details Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Display only		Unit code
Unit Version	Display only		Unit version number
Title	Display only		Title of unit section
Location	Display only		Location unit is offered; on-campus or off-campus site
Unit Class	Display only		Section number, or day and time indicator, depending upon selected user profile option
Unit Mode	Display only		On campus, off campus, or combination
Teaching Period Region			

Table 8–74 Unit Section Details Window Description

Field Name	Type	Features	Description
Call Number	Display only		Short reference to the unit section, incorporating the unit code, version, class, and mode; location, calendar type, start and end dates Note: Call Number is unique across a Load calendar.
Calendar Type	Display only		Institution-defined name for calendar containing all teaching period instances
Alternate Code	Display only		Short reference to the applicable teaching period, incorporating calendar type, start and end dates
Effective Dates	Display only		Start date for teaching period
[End Date]	Display only		End date for teaching period
Unit Section Status	Required	List of values	Status of unit section; can be Open, Planned, Cancelled, Full Unit Section - Accepting Waitlisting, or Closed Note: Users must update the unit section status when the unit section Enrollment Maximum and Maximum Students Per Waitlist are increased in the Unit Section Enrollment Limits and Waitlist window.
[Description]	Display only		Description of unit section status
Cross-Listed		Check box	Automatically selected if unit section is included in the cross-listed group
Unit Section Effective Dates	Optional	Calendar	Start date for unit section, if different from the teaching period start date
[End Date]	Optional	Calendar	End date for unit section, if different from the teaching period end date
Total Weeks	Display only		Total number of weeks unit section meets
Organizational Unit	Required	List of values	Organizational unit responsible for unit section
[Start Date]	Display only		Organizational unit start date
[Description]	Display only		Description of organizational unit
Special Permission		Check box	If selected, indicates special permission is Required for enrollment
Attendance Required		Check box	If selected, indicates attendance is Required for unit section

Table 8–74 Unit Section Details Window Description

Field Name	Type	Features	Description
Non Standard Unit Section		Check box	If selected, unit section will not span across a teaching period and will have different start and end dates Note: A standard unit section has the same effective dates as the teaching period attached to it.
Auditable	Optional	Check box	If selected, indicates that unit section is auditable.
Permission to Audit	Optional	Check box	If selected, indicates that permission is required to audit unit section. Only enabled if the auditable check box is checked.
Occurrences		Button	Opens Unit Section Occurrences window to define unit section schedules like meeting days, time, instructors, building, and room
Enrollments		Button	Opens Unit Section Enrollment Limits and Waitlists window
Credit Points		Button	Opens Unit Section Credit Points window to view details regarding the credit points, hours, and workload assigned to the unit section
Assessments		Button	Opens Unit Section Assessments window to define unit section exam dates, location, and assessment items
References		Button	Opens Unit Section Reference Codes window to define reference codes for unit section
Repeat Conditions		Button	Opens Unit Section Repeat Conditions window to define repeat conditions of unit section like reenroll for credit points
Teaching Responsibilities		Button	Opens Unit Section Teaching Responsibilities window to define teaching responsibilities for the unit section
Notes		Button	Opens Unit Section Notes window to attach note types to unit sections
Categories		Button	Opens Unit Section Categorizations window to assign unit section to unit categories
Unit Section Version Rules		Button	Opens Unit Section Version Rules window to attach rules to unit sections

Table 8–74 Unit Section Details Window Description

Field Name	Type	Features	Description
Plus Hours		Button	Opens Unit Section Unscheduled Contact List window
Enrollment Deadlines		Button	Opens the Enrollment Deadline Calculations window to define deadlines for enrollment to unit section
Cross-Listed Unit Section Groups	Display only	Button	Enabled only when unit section is included in the cross-listed group; opens Cross-Listed Unit Section Groups window

8.12.5 Setting Up Unit Section Credits Points IGSPS086

Each unit section is assigned a specific number or range of credit point values.

The unit section credit points procedure allows the user to query, define, and maintain various credit point values for each unit section. Credit point attributes are inherited from the parent unit and can be modified at the unit section level. Users can insert, update, and delete all the credit points except for enrolled credit points and achievable credit points.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query appropriate data.
2. Click Find.
The Unit Section Details window appears.
3. Click the Credit Points Button.
The Unit Section Credit Points window appears.
4. Enter data in each field of the Unit Section Credit Points window, as described in the table.
5. Save your work.

6. Click Done to close the window.

Table 8–75 Unit Section Credit Points Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Title of unit section
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number, or day and time indicator, depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate code of the unit
Effective Dates	Default, display only		Start date for teaching period
[Effective Dates]	Default, display only		End date for teaching period
Unit Section Status	Default, display only		Indicates if unit section is active or inactive
Unit Section Effective Dates	Default, display only		Start date for unit section, if different from the teaching period start date
[Unit Section Effective Dates]	Default, display only		End date for unit section, if different from the teaching period end date

Table 8–75 Unit Section Credit Points Window Description

Field Name	Type	Features	Description
Credit Points Tab			
Enrolled Credit Points	Default, display only	List of values	Number of credit points in which a student is enrolled
Achievable Credit Points	Default, display only		Number of credit points that a student can achieve
Override	Optional	Check box	This value is defaulted from the unit level. If checked, then the override maximum, minimum and increment values must be entered.
Override Credit Increment	Optional		Allowable increment by which override credit points can be specified Only available if the Override credit point check box is checked.
Override Credit Point Minimum	Optional		Minimum credit points allowed for a unit section Only available if the Override credit point check box is checked.
Override Credit Point Maximum	Optional		Maximum credit points allowed for a unit section Only available if the Override credit point check box is checked.
Lecture Credit Points	Optional		Lecture credit points
Lab Credit Points	Optional		Lab credit points
Other Credit Points	Optional	Check box	Credit point for other activities
Continuing Education Units	Optional		Credit point values associated with a unit section that do not grant regular academic credit
Exclude from Max Credit Point Limit	Optional	Check box	If selected, indicates that a unit is excluded from the maximum credit point limit
Back		Button	Returns to the Unit Section Details window

8.12.6 Setting Up Unit Section Reference Codes IGSPS091

The unit section reference codes procedure creates and maintains the alternative, institution-defined reference codes by which a unit section can be identified.

For example, when a unit section is displayed in the Unit Section Details window and the References Button is clicked, this window displays the same unit section as the context record and any existing reference codes relating to this record.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Reference.
The Unit Section Reference Codes window appears.
4. Enter data in appropriate fields.
5. Save your work.
6. Click Done to return to the Unit Section Details window.

8.12.7 Setting Up Unit Section Notes IGSPS060

The Unit Section Notes window is used to attach additional information to unit sections in the form of notes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Sections > Unit Section Notes window

Steps

1. Query the appropriate record and click Unit Offering. The Unit Offering window appears. Click Unit Sections. The Unit Sections window appears. Click Unit Section Notes. The Unit Section Notes window appears.
2. Alternatively, navigate to the Unit Section Notes window as follows:
 Program Structure and Planning > Unit Section > Unit Section Details > Note
 The Find Unit Sections window appears. Query the appropriate record and click Notes. The Unit Section Notes window appears.
3. Enter data in appropriate fields of the Unit Section Notes window as described in the table.
4. Save or save and continue as follows:
 File > Save or Save and Proceed

Table 8–76 Unit Section Notes Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit version number
Unit Status	Default, display only		Unit status
Calendar Type	Default, display only		Teaching period calendar type
Effective Dates	Default, display only		Unit section start and end dates
Title	Default, display only		Unit title
Location	Default, display only		Unit location
Unit Class	Default, display only		Unit class
Unit Section Notes Region			

Table 8–76 Unit Section Notes Window Description

Field Name	Type	Features	Description
Note Type	List of values	Required	Program note type
Description	Display only		Program note type description
Edit Note		Button	Opens Text Notes window Note: Users can enter a note for a unit section note type in the Text Notes window.

8.12.8 Setting Up Unit Section Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.12.9 Setting Up Unit Section Categorizations IGSPS103

Categorization enables the cross referencing of units or unit sections. Institutions associate units and unit sections with departments or subject areas outside the unit’s owning organization, while creating a published program schedule or class schedules.

For example, the schedule can contain a subject area called Environmental Studies, but all the unit sections that appear are actually owned by other organizational units such as Biology, Business Administration, or Sociology.

The unit section categorizations procedure enables users to associate categories inherited from units with unit sections.

Prerequisites

Unit Categorizations IGSPS052

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query in appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Categories.
The Unit Section Categorizations window appears.
4. Enter data in each field of the Unit Section Categorizations window as described in the table.
5. Save your work.
6. To return to the Unit Section Details window, click Back.

Table 8–77 Unit Section Categorizations Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version

Table 8–77 Unit Section Categorizations Window Description

Field Name	Type	Features	Description
Title	Default, display only		Unit section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number, or day and time indicator, depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code
Effective Dates	Default, display only		Start and end dates for teaching period
Unit Section Status	Default, display only		Indicates if unit section is active or inactive, open or closed for categorization
Unit Section Effective Dates	Default, display only		Start and end dates for unit section, if different from the teaching period start date
Unit Section Categorization Region			
Category	Required	List of values	Institution-defined grouping of unit section Note: Categories can be queried if the unit section status is Cancelled. Categories cannot be inserted or updated if the status is Cancelled.
Description	Default, display only		Category description
Back		Button	Returns to the Unit Section Details window

8.12.10 Setting Up Unscheduled Contact Lists IGSPS118

Institutions require information about the unscheduled contacts in a unit section for funding purposes. The list consists of the time and percentage of rooms that students or faculty members use. As rooms are not scheduled by date, day, or time, the contact list is considered unscheduled.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Unit Section > Unit Section Details window > Plus Hours button > Unit Section Unscheduled Contact List window

Steps

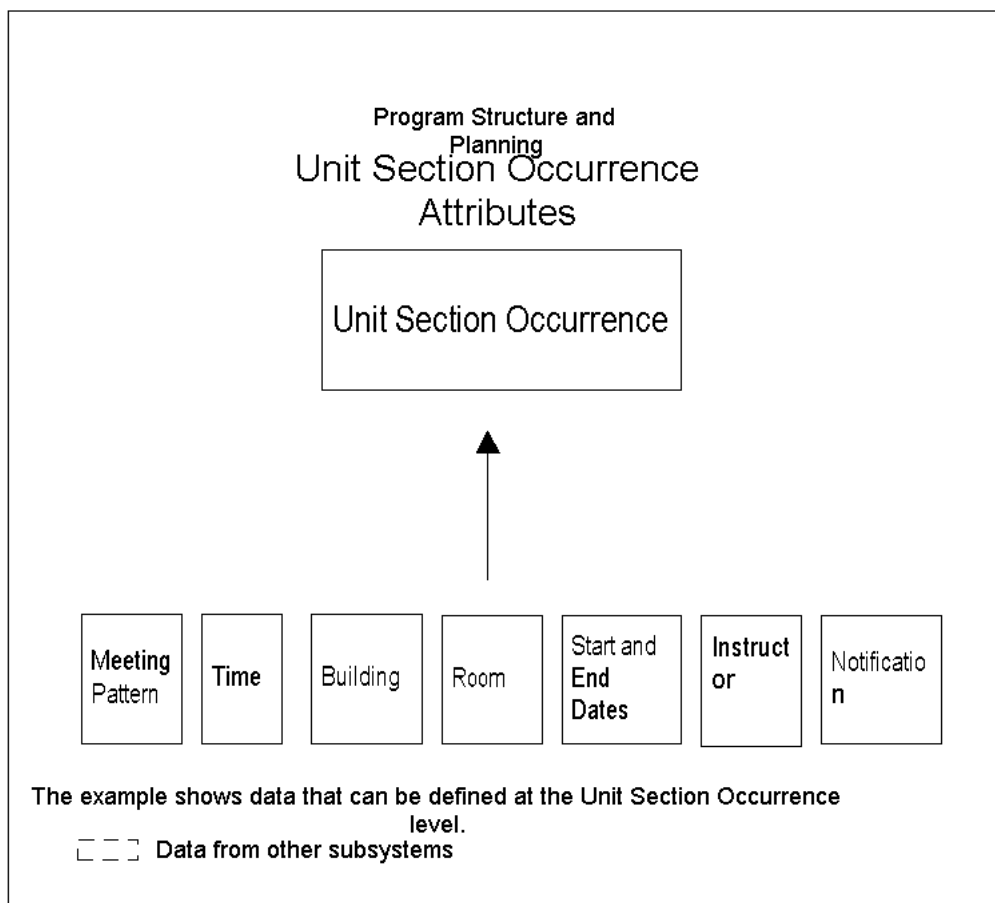
1. Enter or query the appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Plus Hours.
The Unit Section Unscheduled Contact List window appears.
4. Enter or query the appropriate record.
5. In the Enrolled Credit Points field, enter an enrolled credit point.
6. In the Actual Enrollment Number field, enter an enrollment number.
7. In the Activity Locations tab, select an activity type, location, building, and room from the List of values.
8. In the Weekly Contact Hours tab, enter values in the appropriate fields.
9. In the Instructor ID field, select an Instructor ID from the List of values.
10. To set up an activity type for a unit section, click Activity Types.
11. Save your work.

8.13 Unit Section Occurrence

Unit section occurrences further define unit sections. For example, a unit section occurrence indicates a building for a particular unit section occurrence.

Figure 8–10 shows the data that is defined at the unit section occurrence level.

Figure 8–10 Unit Section Occurrence Attributes



The attributes defined at the unit section occurrence level include the following:

- meeting pattern

- time
- building
- room
- start and end dates
- notifications

8.13.1 Setting Up Unit Section Occurrence IGSPS084

The unit section occurrence procedure enables users to schedule unit section occurrences such as meeting days, dates, time, multiple instructors, building, and room.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Occurrences.
The Unit Section Occurrences window appears.
4. Enter data in each field of the Unit Section Occurrences window as described in the table.
5. Save your work.

Table 8–78 Unit Section Occurrences Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Display only		Unit section code
Unit Version	Display only		Unit version number
Title	Display only		Unit name
Location	Display only		Unit location
Unit Class	Display only		Unit class code
Unit Mode	Display only		Unit section mode
Teaching Period Region			
Call Number	Display only		System-defined call number
Calendar Type	Display only		Unit calendar type
Alternate Code	Display only		Unit's alternate code
Effective Dates	Display only		Effective teaching period start and end dates
Header Region			
Unit Section Status	Display only		Current unit section status
Unit Section Effective Dates	Display only		Effective unit section start and end dates
Unit Section Occurrences Tab			
To Be Announced	Optional	Check box	<p>If selected, indicates that unit section occurrences are yet to be announced</p> <p>Note: If the To Be Announced check box is selected, users need not enter any values in the Day and Time fields at the Unit Section Occurrences level while creating a Unit Section Occurrence.</p>
Days Starting Monday Region			

Table 8–78 Unit Section Occurrences Window Description

Field Name	Type	Features	Description
1, 2, 3, 4, 5, 6, 7	Optional	Check boxes	If selected, indicates day of the week starting monday; for example, 1 = Monday, 2 = Tuesday, 3 = Wednesday and so on Note: In the Days field, at least one check box among seven must be selected before a record can be saved.
Total Days	System generated		Total number of unit section occurrence days Note: In the Total Days field, the system calculates the total number of days for the selected days of the week between the unit section start and end dates.
Effective Dates Region			
Start	Required	Calendar	Effective unit section start date
End	Required	Calendar	Effective unit section end date
# of weeks	Display only		Total number of weeks for the unit section
Time Region			
Start	Required	Calendar	Unit section start time
End	Required	Calendar	Unit section end time
Building	Display only		Building name
Room	Display only		Room number
Include Instructor Change in Notification		Check box	If selected, includes the instructor change information in the notification
[Descriptive Flexfield]	Optional		User-customization field
Cancel Schedule	Optional	Check box	If selected, indicates that the unit section occurrence schedule is cancelled
Schedule Status	Display only		Unit section occurrence schedule status
Error Text	Display only		Error text for the unit section occurrence
Instructors		Button	Opens the Instructors window
Scheduled Building		Button	Opens the Scheduled Building window
Other Building Options		Button	Opens the Other Building Options window

Table 8–78 Unit Section Occurrences Window Description

Field Name	Type	Features	Description
Unit Section Occurrence Reference Codes Tab			
Reference Code Type	Required	List of values	Unit section occurrence reference code type
Description	Display only		Reference code type description
Reference Code	Required	List of values	Reference code name
Description			Reference code name description
Footer Region			
Schedule Current	Only available if the profile option for install scheduling software is set to Yes	Button	Schedules the selected unit section occurrence
Schedule Set	Only available if the profile option for install scheduling software is set to Yes	Button	Schedules the unit section occurrence set
Facilities		Button	Opens the Unit Section Occurrence Facilities window
Notify Current		Button	Notifies instructors and the corresponding administration officials about the unit section occurrence
Notify Set		Button	Notifies instructors and the corresponding administration officials about the complete set of unit section occurrences
Back		Button	Returns users to the Unit Section Details window

Setting Up Instructors

Instructors are assigned to a unit section based on the unit section schedules maintained in Oracle Student System. Users can now assign multiple instructors to a unit section based on their unit occurrence schedules. If a unit section occurrence is associated with multiple instructors, the data related to all multiple instructors is passed on to the scheduling interface tables.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Occurrences.
The Unit Section Occurrences window appears.
4. Enter or query data in the appropriate fields.
5. Click Instructors.
The Instructors window appears.
6. Enter data in each field of the window as described in the table. Save your work.
7. Click Back to return to the Unit Section Occurrences window.

Table 8–79 Instructors Window Description

Field Name	Type	Features	Description
Instructor ID	Required	List of values	Unique instructor identifier
Instructor Name	Display only		Scheduled instructor’s name
Back		Button	Returns to the Unit Section Occurrences window

Setting Up Scheduled Building

Buildings and rooms are associated with a unit section along with various other attributes within a unit section such as different locations, dates, and time. Buildings and rooms are scheduled based on unit section schedules.

Note: If Scheduled building and room are entered, you will not be able to enter any other building and room information such as the preferred or dedicated building and room.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Occurrences.
The Unit Section Occurrences window appears.
4. Click Scheduled Building.
The Scheduled Building window appears.

5. Enter data in each field of the window as described in the table. Save your work.

Table 8–80 Scheduled Building Window Description

Field Name	Type	Features	Description
Scheduled Region			
Building	Required	List of values	Building complex name scheduled for a unit section occurrence
Room	Display only		Room number
Back		Button	Returns users to the Unit Section Occurrences window

Setting Up Other Building Options

Several other buildings are associated with a unit section along with various attributes within a unit section, based on different locations, dates, and time.

The other building options procedure enables users to schedule dedicated and preferred buildings to a unit section occurrence.

Note: You can only either enter Dedicated building and room or Preferred building and room, but not both.

If you have already entered values for the scheduled building and room, then the you will not be able to enter information here.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.

The Unit Section Details window appears.

- 3. Click Occurrences.
The Unit Section Occurrences window appears.
- 4. Click Other Building Options.
The Other Building Options window appears.
- 5. Enter data in each field of the window as described in the table. Save your work.
- 6. Click Back to return to the Unit Section Occurrences window.

Table 8–81 Other Building Options Window Description

Field Name	Type	Features	Description
Dedicated Region			
Building	Required		Dedicated building complex name scheduled for a unit section occurrence
Room	Required		room number
Preferred Region			
Building	Required	List of values	Preferred building complex name scheduled for a unit section occurrence
Room	Required	List of values	Preferred room number
Back		Button	Returns users to the Unit Section Occurrences window

8.13.2 Setting Up Unit Section Occurrences Facilities IGSPS114

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

- 1. Enter or query data in the appropriate fields.

2. Click Find.

The Unit Section Details window appears.

3. Click Occurrences.

The Unit Section Occurrences window appears.

4. Enter data in the appropriate fields.

5. Click Facilities.

The Unit Section Occurrence Facilities window appears.

6. In the Facility Code field, select a facility code from the List of values.

The Facility Description field automatically populates the corresponding facility description.

Repeat the above step to schedule other facilities.

7. Save your work.

8.13.3 Setting Up Media and Equipment IGSPS080

In the Media and Equipment window, codes representing media and other instructional equipment in a classroom, such as televisions, computers, video cassette recorders, microphones, white boards, and podiums, are entered.

These codes are used in the Facilities tab of the Unit Locations and Facilities window to enter media and equipment needed for unit instruction.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Media and Equipment window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–82 Media and Equipment Window Description

Field Name	Type	Features	Description
Code	Required		Media and equipment code
Description	Required		Media and equipment code description
Closed	Optional	Check box	If selected, prevents further use of a record

8.14 Unit Section Teaching Responsibility IGSPS116

In Oracle Student System, multiple instructors can be assigned at the unit section occurrence level. The unit section teaching responsibilities procedure enables users to assign the lead instructor, the teaching load, and the percentage. Example for assigning multiple instructors is where a laboratory section needs a laboratory assistant as well as the instructor.

Prerequisites

Unit Section Occurrences IGSPS084

Responsibility

Oracle Student System Super User

Navigation

Unit Section- Unit Section Details window

Steps

1. Enter or query appropriate data.
2. Click Find.
The Unit Section Details window appears.
3. Click Teaching Responsibilities.
The Unit Section Teaching Responsibilities window appears.
4. Enter date in each field of the Unit Section Teaching Responsibilities window, as described in the table.
5. Save your work.

Table 8–83 Unit Section Teaching Responsibilities Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Unit section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number, or day and time indicator depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code
Effective Dates	Default, display only		Teaching period start and end dates
Unit Section Status	Default, display only		Institution-defined unit section status
Unit Section Effective Dates	Default, display only		Unit section start and end dates if different from the teaching period start and end dates
Teaching Responsibility Tab			
Instructor Number		List of values	Instructor number
Surname	Default, display only		Instructor's surname

Table 8–83 Unit Section Teaching Responsibilities Window Description

Field Name	Type	Features	Description
Confirmed	Required	Check box	If selected, indicates that an instructor is confirmed for teaching
%			Percentage of responsibility Note: In the Teaching Responsibilities tab, the load percentage of a unit section must add up to 100%.
Workload Region, Teaching Responsibility Tab			
Lecture	Optional		Institution-defined instructional workload
Laboratory	Optional		Institution-defined laboratory workload
Other	Optional		Other workload, if any
Lead Instructor	Required	Check box	If selected, identifies an instructor as the lead instructor Note: There can be only one lead instructor for a unit section.
Sponsorship Tab			
Organizational Unit	Required	List of values	Sponsoring unit
Percentage	Required		Sponsorship percentage
Back		Button	Returns to the Unit Section Details window

8.15 Program Annual Loads

Annual load refers to the standard annual load for each year of a program. Annual load can be variable or standard.

If the standard annual load is constant, it can be entered as a single value in the Basic Program Details window.

Institutions that have a variable annual credit point load for a full-time year of study use the Program Annual Loads region of the Program Annual Load window. If the annual credit point load varies, an Effective Full-Time Student Units calculation derives a student's attendance type.

For example, if the annual credit point load for a full-time year of study varies between years within a program, annual credit point values must be entered for each year of the program version. This is illustrated as follows:

year1 = 96 credit points

year2 = 108 credit points

year3 = 96 credit points

Unit versions can be linked to program annual loads for the purpose of calculating their Effective Full-Time Student Units. In particular, a unit version can be linked to the load for a particular year of a program.

8.15.1 Setting Up Program Annual Load IGSPS025

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Annual Load.

The Program Annual Load window appears.

4. Enter data in appropriate fields of the Program Annual Load window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–84 Program Annual Load Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program unique identifier
Version Number	Default display only		Program version number
Program Status	Default display only		Program status; can be Planned, Active, or Inactive
Title	Default display only		Program title; for example, computer science, mechanical engineering
Program Annual Loads Region			
Year Number			Year to which the load is applicable
Effective Dates			Effective from and to dates of the annual load
Annual Load Value			Number of credit points that constitute the annual load attached to the program version
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Program Annual Load Unit Links region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Program Annual Load Unit Links region is refreshed only when users navigate to the Unit Code field in the Program Annual Load Unit Links region. Leave deselected to speed up performance when querying records.
Program Annual Load Unit Links Region			
Unit Code	Optional		Unit version code to which program annual load is linked
Version Number	Optional		Unit version number
Title			Unit version title

8.16 Unit Sets

Unit sets define a path of study, ensuring the satisfactory progression and completion of student program attempts. This section includes the following topics:

- Unit Set Functions
- Academic and Administrative Unit Sets
- Unit Set Reference Data
- Unit Sets and Encumbrances

Unit Set Functions

The following table describes how unit sets are used in various subsystems.

Table 8–85 Unit Set Functions

Subsystem	Unit Set Function
Program Structure and Planning	enables creation and maintenance of unit sets and mapping of unit sets to entry point reference codes for Admissions uploads
Admissions	enables selection of unit set as part of an admission application. If an offer of admission is made, details regarding this unit set form part of the admission offer.
Enrollments	unit sets can be included as part of student's program attempt
Graduation	enables ordering of graduation ceremonies, grouping graduands by unit set as well as program
Student Finance	unit sets can trigger fee calculations for students enrolled in unit set

Academic and Administrative Unit Sets

Academic unit sets further define the path of study a student has selected, such as a major in Accounting or a specialization in Taxation.

Administrative unit sets restrict the paths a student can follow within a program. For example, a Bachelor of Business program can have the following user-defined administrative unit set streams:

- Stream 1: Accounting, Banking and Finance, and Economics majors
- Stream 2: Management, Marketing, and Communications majors

A student enrolled in the Bachelor of Business program who elects to complete an Accounting major is restricted to unit sets in Stream 1. The student cannot pursue unit sets in Stream 2 except in special circumstances.

Administrative unit sets also include subjects that all students are required to complete. For example, a core unit set can consist of an English unit and a Physical

Education unit to be completed by all students as part of their program, regardless of field.

Administrative unit sets also define progression components of a program.

UK Note: Administrative unit sets with categories of enrollment year are used to represent the year of program.

Note: By default, administrative unit sets are not displayed on documentation such as transcripts and diplomas, except for the UK year of program unit sets.

The following table describes sample components of user-defined administrative unit Stream 1 in a Bachelor of Business program of study.

Table 8–86 Academic Unit Sets

Majors	Minors	Specializations
Accounting	Taxation	Public Speaking
	Small Business	Information Technology
	Information Systems	Budgets
	Auditing	Proposals and Grants
	Share Market	Government and Politics
	International Business	
	Banking Regulations	
	Money Management	
	Third World Countries	
	Public Sector Economics	
	Regional Planning	

Table 8–86 Academic Unit Sets

Majors	Minors	Specializations
Banking and Finance	Taxation Small Business Information Systems Auditing Share Market International Business Banking Regulations Money Management Third World Countries Public Sector Economics Regional Planning	Public Speaking Information Technology Budgets Proposals and Grants Government and Politics
Economics	Taxation Small Business Information Systems Auditing Share Market International Business Banking Regulations Money Management Third World Countries Public Sector Economics Regional Planning	Public Speaking Information Technology Budgets Proposals and Grants Government and Politics

The following table describes sample components of user-defined administrative unit Stream 2 in a Bachelor of Business program of study

Table 8–87 Administrative Unit Sets

Majors	Minors	Specializations
Management	Industrial Relations Public Sector Management Human Resource Management Arbitration Advertising Tourism Arts and Culture Sports Public Relations Organizational Communication Languages	Public Speaking Information Technology Budgets Proposals and Grants Government and Politics
Marketing	Industrial Relations Public Sector Management Human Resource Management Arbitration Advertising Tourism Arts and Culture Sports Public Relations Organizational Communication Languages	Public Speaking Information Technology Budgets Proposals and Grants Government and Politics

Table 8–87 Administrative Unit Sets

Majors	Minors	Specializations
Communications	Industrial Relations Public Sector Management Human Resource Management Arbitration Advertising Tourism Arts and Culture Sports Public Relations Organizational Communication Languages	Public Speaking Information Technology Budgets Proposals and Grants Government and Politics

The student in the following example is enrolled in a Bachelor of Business with a major in Accounting. The student has the following unit set options:

- 2 majors
- 1 major and 2 minors
- 1 major, 1 minor, and 2 specializations
- 1 major, 1 minor, and electives

The following rules apply to the program:

- Students are restricted by stream through the use of unit set rules. For example, a student in Stream 1 cannot select a major or minor from Stream 2.
- Specializations are available for all student program attempts.

Given these rules, a student enrolled in the Bachelor of Business program who elects to study Accounting has to select one of the following unit set options:

- another major, Banking and Finance or Economics. The student cannot select a major from Stream 2.
- two minors, from any of those listed under Stream 1
- one minor from Stream 1 and any two specializations

- one minor from Stream 1 and a number of electives from either stream or from other programs

Note: In special circumstances, institution policy can allow students to select unit set majors or minors from Stream 2. The Authorized By fields must be filled in under these circumstances.

Unit Set Reference Data

In order for unit sets to be created, the reference data listed in the following table must be created and maintained:

Table 8–88 Unit Set Reference Data

Reference Data	Purpose	Window
unit set categories	to define type of unit set in the Basic Unit Set Details window. Each unit set category must be assigned a rank.	Unit Set Categories
unit set statuses	to define status of unit set in the Basic Unit Set Details window Note: It is recommended that a one-to-one correspondence be established with the values of ACTIVE, INACTIVE, and PLANNED.	Unit Set Statuses

Unit Sets and Encumbrances

The Excluded from Enrollment in a Specific Program Unit Set effect type, one of the system encumbrance effect types available to institutions, can prevent a student within a particular program from selecting a specific unit set.

For information on applying encumbrances to individual students, see **Chapter 4, "Systemwide Services: Person"**.

8.16.1 Setting Up Unit Set Categories IGSPS063

The unit set categories procedure maintains institution-defined unit set categories. The following table describes an example of unit set categories and ranks.

Table 8–89 Unit Set Categories and Ranks

Category	Rank
Core	5
Major	1
Dbl-Major	1
Minor	2
Stream	4
Speclizatn	3

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Set > Unit Set Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–90 Unit Set Categories Window Description

Field Name	Type	Features	Description
Unit Set Category	Required		Institution-defined unit set category Note: Once used in the system, unit set categories cannot be deleted, and can sustain only minor modifications.
Description	Required		Unit set category description
System Unit Set Category	Required		System-defined unit set category; for example, Major, Minor
Rank	Required		Unit set category rank Note: Once used in the system, the unit set rank cannot be modified. Note: Each code must have a rank assigned. The unit set category rank defaults to 1 and can be altered. The unit set rank is primarily used to define the sequence in which unit sets are displayed; for example, transcripts of results. The rank also determines whether a unit set can be a primary set within the Student Unit Set Attempt History window.
Closed	Optional	Check box	If selected prevents further use of a unit set category

8.16.2 Setting Up Unit Set Statuses IGSPS064

The unit set statuses procedure enters the institution-defined codes for the status of a unit set. Examples of codes include Active, Inactive, and Planned. Data maintained in this window is used in the Basic Unit Set Details window. The Basic Unit Set Details window maintains unit sets and unit set details.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Set > Unit Set Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–91 Unit Set Statuses Window Description

Field Name	Type	Features	Description
Unit Set Status	Required		Institution-defined code for a unit set status
Description	Required		Unit set status description
System Unit Set Status	Required	drop-down list	Defaults to Active; can be changed to Planned or Inactive
Closed	Optional	Check box	If selected, prevents further use of unit set status

8.16.3 Setting Up Basic Unit Set Details IGSPS065

Unit sets are used to define a student's nominated path of study and to assist in the assessment of progression and completion of the student's program attempt. A unit set can be defined as academic or administrative.

- Academic unit sets do not have the Administrative check box selected. Academic unit sets are those that further define a student's path of study, for example, Majors and Minors.
- Administrative unit sets are used to define progression components of a program or to restrict the set of academic unit sets that a student can pursue.

Note: This procedure does not attach units to unit sets. Unit set rules are established in the Unit Set Rules window.

A unit set has the following four date fields:

- The Start Date field value is inserted by the system when it creates the unit set.
- The Review Date field is used as an indication of when a unit set must be reviewed and updated.
- Setting the Expiration Date field prevents further selections of a unit set while keeping the unit set active for current students. Unit sets that have an expiry date set, display a label when selected on all relevant screens.
- Setting the End Date field prevents further use or alteration of the unit set.

Unit sets can be restricted to selected program types in the Unit Set Program Type Restrictions region. Selecting a program type from the List of values restricts the unit set to the selected program type or types. If no program types have been selected, the unit set is available for all program types.

The unit set statuses procedure enters the institution-defined codes for the status of a unit set. Examples of codes include Active, Inactive, and Planned. Data maintained in this window is used in the Basic Unit Set Details window. The Basic Unit Set Details window maintains unit sets and unit set details.

The unit set categories procedure maintains institution-defined unit set categories.

Table 8–92 Unit Set Categories and Ranks

Category	Rank
Core	5
Major	1
Dbl-Major	1
Minor	2
Stream	4
Specialization	3

Institution-defined codes indicate the type of unit set in the Basic Unit Set Details window. Examples of codes include Core, Major, Stream, Dbl-Major, Minor, and Specialization.

The unit set rules procedure queries unit set rules.

In Oracle Student System, the available unit set rules are Unit Set Prerequisite and Unit Set Completion.

Unit Sets

Unit sets are used to define a student’s nominated path of study and to assist in the assessment of progression and completion of the student’s program attempt. A unit set can be defined as academic or administrative.

- Academic unit sets do not have the Administrative check box selected. Academic unit sets are those that further define a student’s path of study, for example, Majors and Minors.

- Administrative unit sets are used to define progression components of a program or to restrict the set of academic unit sets that a student can pursue.

Note: This procedure does not attach units to unit sets. Unit set rules are established in the Unit Set Rules window.

A unit set has the following four date fields:

- The Start Date field value is inserted by the system when it creates the unit set.
- The Review Date field is used as an indication of when a unit set must be reviewed and updated.
- Setting the Expiration Date field prevents further selections of a unit set while keeping the unit set active for current students. Unit sets that have an expiry date set, display a label when selected on all relevant screens.
- Setting the End Date field prevents further use or alteration of the unit set.

Unit sets can be restricted to selected program types in the Unit Set Program Type Restrictions region. Selecting a program type from the List of values restricts the unit set to the selected program type or types. If no program types have been selected, the unit set is available for all program types.

Institution-defined codes indicate the type of unit set in the Basic Unit Set Details window. Examples of codes include Core, Major, Stream, Dbl-Major, Minor, and Specialization.

Prerequisites

Basic Unit Details IGSPS047

Program Statuses IGSPS009

Unit Set Categories IGSPS063

Unit Set Statuses IGSPS064

Program Offering Notes IGSOR031

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–93 Basic Unit Set Details Window Description

Field Name	Type	Features	Description
Unit Set Code	Required		Unit set code
Version Number	Display only		System-defined unit set version number
Title	Required		Unit set title Note: Once used in the system, unit sets cannot be deleted.
Unit Set Category	Required	List of values	Unit set category and description Note: The unit set category can be altered only if the unit set status is Planned.
Unit Set Status	Required	List of values	Unit set status Note: A unit set status cannot be reset to Planned once it is changed to Active or Inactive.
Start Date	Required	Calendar	Date when a unit set version becomes effective
Review Date	Optional	Calendar	Date when a unit set version is due for review
Expiration Date	Optional	Calendar	Date when a unit set version expires Note: Only one version of a unit set can have an unspecified expiration date.
End Date	Optional	Calendar	Date when a unit set version is closed Note: When users set an end date, the unit set status must be changed to Inactive in the same transaction. Similarly, when setting a unit set status to Inactive, an end date must also be entered in the same transaction. Note: The combination of end date and unit set status Inactive cannot be set if there are active students within an offering of the unit set. Note: The details of a unit set version cannot be altered if the unit set status is Inactive. To make changes, reset the unit set status to Active, delete the end date, and save before performing changes.
Short Title	Required		Unit set short title

Table 8–93 Basic Unit Set Details Window Description

Field Name	Type	Features	Description
Abbreviation	Required		Short title abbreviation
Responsible Organization Unit	Optional	List of values	Organizational unit responsible for a unit set Note: Oracle Corporation recommends that all unit sets be mapped to an academic organizational unit.
Administrative	Optional	Check box	If selected, enables a unit set to direct a student's path of study but may not constitute the major studied; for example, core unit sets or streams
Authorization Required	Optional	Check box	If selected, indicates that students who select the unit set be approved
[Descriptive Flexfield]	Optional		User-customization field
Unit Set Rules	Optional	Button	Opens Unit Set Rules window
Unit Set Notes	Optional	Button	Opens Unit Set Notes window
Unit Set Program Type Restrictions Region			
Data Coordination Check Box	Optional	Check box	If selected, data in Basic Unit Set Details window is automatically refreshed and coordinated with data in the header region. If deselected, data in Basic Unit Set Details window is refreshed only when the user clicks in Unit Set Program Type Restrictions region. Leave deselected to speed up performance when querying records.
Program Type	Required	List of values	Program type
Description	Display only		Program type description
Apply Unit Set to Program Offerings		Button	Opens the Apply Unit Set to Program Offerings window

8.16.4 Setting Up Unit Set Rules IGSPS068

In Oracle Student System, the available unit set rules are Unit Set Prerequisite and Unit Set Completion.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Set > Unit Set Rules window

Steps

1. Alternatively, navigate to the Unit Set Rules window as follows:
Program Structure and Planning > Basic Unit Set Details
The Basic Unit Set Details window appears.
2. Query the appropriate record.
3. Click Unit Set Rules.
The Unit Set Rules window appears.
4. View details of the appropriate fields in the Unit Set Rules window as described in the table.
5. To edit rules, click **Edit Rule**.
6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–94 Unit Set Rules Window Description

Field Name	Type	Features	Description
Unit Set Code	Default display only		Unit set unique identifier
Version Number	Default display only		Unit set version number
Unit Set Status	Default display only		Unit set status; can be Planned, Active, or Inactive
Title	Default display only		Unit set title; for example, Year of Program 1, Major, Minor

Table 8–94 Unit Set Rules Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Set Rules region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Set Rules region is refreshed only when the user navigates to the Rule Description field in the Unit Set Rules region. Leave deselected to speed up performance when querying records.
Unit Set Rules Region			
Rule Description	Default display only		Description of the rule attached to the unit set; if undefined in the Rule window, displays Undefined in the adjacent field
Rule Text	Default display only		Details of the rule
Edit Rule	Optional	Button	Opens the Rule window to edit the rule or define an undefined rule

8.16.5 Setting Up Unit Set Notes IGSPS067

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Set Notes.
The Unit Set Notes window appears.
3. Enter data in the appropriate fields of the Unit Set Notes window as described in the table.
4. Save or save and continue as follows:

File > Save or Save and Proceed

Table 8–95 Unit Set Notes Window Description

Field Name	Type	Features	Description
Unit Set Code	Default, display only		Code of the unit set
Version Number	Default, display only		Version number of the unit set
Unit Set Status	Default, display only		Unit set status
Title	Default, display only		Title of the unit set
Unit Set Category	Default, display only		Institution-defined unit set category
[Description]	Default, display only		Description of the unit set category
Unit Set Notes Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Unit Set Notes window is automatically refreshed and coordinated with data in the Basic Unit Details window; if deselected, data in Unit Set Notes window is refreshed only when the user clicks in Unit Set Notes region. Leave deselected to speed up performance when querying records.
Program Note Type	Required	List of values	Unit set note type
Description	Default, display only		Description of the unit set note type
Edit Note		Button	Opens Text Notes window

8.16.6 Setting Up Unit Set Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.16.7 Applying Unit Sets to Program Offerings IGSPS066

Prerequisites

Program Types IGSPS001

Basic Program Details IGSPS013

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Apply Unit Set to Program Offerings.
The Apply Unit Set to Program Offerings window appears.
3. Enter data in appropriate fields of the Apply Unit Set to Program Offerings window as described in the table.
4. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–96 Apply Unit Set to Program Offerings Window Description

Field Name	Type	Features	Description
Unit Set Code	Default display only		Unit set code
Version Number	Default display only		Unit set version number
Unit Set Status	Default display only		Unit set status
Title	Default display only		Unit set title
Unit Set Category	Default display only		Unit set category
Program Offerings Region			
Apply to All Offerings		Button	Click to apply unit set to all program offerings
Apply to Highlighted Offering		Button	Click to apply unit set to highlighted program offerings only
Program Type	Default display only		Program type
Program Code	Default display only		Program type code
Version	Default display only		Program type version
Calendar Type	Default display only		Calendar type attached to the program type
Program Status	Default display only		Program status
Organization Unit Code	Default display only		Organizational code where program is offered
Program Offering Unit Sets		Button	Opens Program Offering Unit Sets window

8.16.8 Setting Up Program Offering Unit Sets IGSPS020

The program offering unit sets procedure maps unit sets to individual program offerings.

The Program Offering Unit Sets window can be accessed in the following ways:

- selecting Program Offering Unit Sets from the Program Structure and Planning menu
- clicking the Program Offering Unit Set button in the Program Offerings window.
- clicking the Program Offering Unit Sets button in the Apply Unit Set to Program Offerings window

When the user navigates to the Program Offering Unit Sets window by using navigation buttons, the program offering details are displayed in the Program Offering region. Unit sets assigned to the program offering are displayed in the Program Offering Unit Sets region.

Queries can be performed in the Program Offering region only when the Program Offering Unit Sets window is accessed through the Program Structure and Planning menu. Queries cannot be performed on Program Offering when the user navigates to the Program Offering Unit Sets window using navigation buttons.

To select a new program offering, users must exit the Program Offering Unit Sets window and return to the Program Offerings window or the Apply Unit Set to Program Offerings window.

The program type details displayed in the Apply Unit Set to Program Offerings window reflect the position of the cursor in the Basic Unit Set Details window. When the cursor there is located in the Unit Set region, all programs for the program type restrictions applied are displayed in this window. When the cursor is located on a program type restriction, then only the programs for the selected program type restriction are displayed in this window.

The following information applies to this procedure:

- Unit sets can be applied to program offerings and queries can be performed on the unit sets previously attached.
- Queries can be performed on program offering unit sets. When performing queries, the Include Expired Unit Sets and the Include Inactive Unit Sets check boxes can be selected.

- The Include Inactive Unit Sets check box cannot be selected without selecting the Include Expired Unit Sets check box.
- Only Active and Planned unit sets can be attached to program offerings.
- Unit sets can be attached only to programs that do not breach the unit sets' program type restrictions. These are maintained in the Basic Unit Set Details window.
- If the Administrative check box is selected in the Basic Unit Set Details window, the Show on Official Notification check box in the Program Offering Unit Sets window is deselected.

Prerequisites

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets window

Steps

1. Enter data in appropriate fields.
2. To apply a unit set to a program offering, enter a valid unit set code or select a unit set code from the List of values.

The List of values displays all Planned or Active unit sets.

3. Optionally, in the Override Title field, enter an override title for the program offering unit set.

The override title displays a title that reflects the unit set and program offering relationship. For example, a unit set containing accounting units is applied to an engineering program. The override title is Engineering Accounting.

4. Optionally, select the Only as Subordinate check box.

When the Only as Subordinate check box is selected, the unit set is restricted from being placed as superior in unit set relationships. If a unit is marked as Only as Subordinate, a unit set must be created in the Program Offering Unit Set Relationships window.

The Only as Subordinate check box cannot be selected if the unit set exists as a superior in a unit set relationship.

The Only as Subordinate check box cannot be altered if the unit set is mapped to a program offering option admission category.

5. Optionally, select the Show on Official Notification check box.

Selecting the Show on Official Notification check box displays the unit set details on official notices such as transcripts.

6. Optionally, click the buttons described in the table and enter data in appropriate fields.

Table 8–97 Program Offering Unit Sets Region Buttons

Button	Description
Program Offering Unit Set Relationships	Opens the Program Offering Unit Set Relationships window
Program Offering Option Unit Sets	Opens the Program Offering Option Unit Sets window

7. Save or save and continue as follows:

File > Save or Save and Proceed

8.16.9 Setting Up Program Offering Unit Set Relationships IGSPS021

The Program Offering Unit Set Relationships procedure creates the hierarchical relationship structure that can exist between unit sets within a program offering. Relationships are created between unit sets to assist in defining the path of study and progression of a student's program attempts.

For example, to study a particular minor, a student must also take its superior major set.

The user navigates to the Program Offering Unit Set Relationships window by clicking Program Offering Unit Set Relationships in the Program Offering Unit Sets window. The window is opened in context displaying the program offering unit set. Any previously attached superior and subordinate unit sets are also displayed.

Prerequisites

Basic Program Details IGSPS013

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets window

Steps

Note: If a unit set has the Only as Subordinate check box selected in the Program Offering Unit Sets window, only superior relationships can be created against the unit set.

1. Enter data in appropriate fields.
2. Click Program Offering Unit Set Relationships.
The Program Offering Unit Set Relationships window appears.
3. To create a superior relationship, in the Superior Unit Set field, select a unit set from the List of values.
The List of values is restricted to those unit sets that are applied to the program offering.
4. To create a subordinate relationship, in the Subordinate Unit Set field, select a unit set from the List of values.
The List of values is restricted to those unit sets that are applied to the program offering.
5. Save or save and continue as follows:
File > Save or Save and Proceed

8.16.10 Setting Up Program Offering Option Unit Sets IGSPS022

The Program Offering Option Unit Sets procedure applies unit sets to program offering options. Typically, the Program Offering Option Unit Sets procedure deletes one or more preexisting unit sets, established in the Program Offering Unit Sets window, that are not available within a particular program offering option.

When the Program Offering Option Unit Sets window is opened, the program offering option details are displayed in context in the Program Offering Options region. Unit sets that are assigned the program offering options are displayed in the Program Offering Option Unit Sets region.

Queries can be performed in the Program Offering Option region only when the Program Offering Option Unit Sets window is accessed through the menu. When the Program Offering Option Unit Sets window is opened using a navigation Button, queries cannot be performed in the Program Offering Option region. To select a different program offering, exit the Program Offering Option Unit Sets window and return to the Program Offering Options window or the Program Offering Unit Sets window.

Users can attach unit sets to program offering options in the Program Offering Option Unit Set window.

The following information applies to this procedure:

In the Program Offering Option Unit Sets window, the Include Inactive Unit Sets check box cannot be selected without selecting the Include Expired Unit Sets check box.

Prerequisites

Program Attendance Modes IGSPS005

Attendance Type IGSPS006

Organizational Units IGSOR030

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets window

Steps

1. Query the appropriate data.
2. Click Program Offering Option Unit Sets.
The Program Offering Option Unit Sets window appears.
3. Enter data in appropriate fields.

4. In the Program Code field, query a program offering.
Queries can be performed on unit sets within a program offering option.
5. To display inactive unit sets and unit sets that are unavailable for enrollment, select the Include Expired Unit Sets check box or the Include Inactive Unit Sets check box.
6. In the Unit Set Code field, enter a unit set code or select one from the List of values.
The unit set codes displayed in the List of values are restricted to those applied to the program offering in the Program Offering Unit Sets window.
7. Save or save and continue as follows:
File > Save or Save and Proceed

8.16.11 Setting Up Program Offering Option Unit Set HESA Details

Prerequisites

Basic Program Details IGSPS013

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details

Steps

1. Query a program as follows:
View > Query by Example > Enter
2. Enter search criteria.
3. Run the query as follows:
View > Query by Example > Run
4. Click **Program Offering**.
The Program Offerings window appears.
5. Click **Program Offering Options**.

The Program Offering Options window appears.

6. Click **Program Offering Option HESA Details**.

The Program Offering Option Unit Set HESA Details window appears.

7. Enter data in each field of the window as described in the table. Save your work.

Table 8–98 Program Offering Option Unit Set HESA Details Window Description, Details, Credit Points, and Teaching Tabs

Field Name	Type	Features	Description
Program Code	display only		program code
Version Number	display only		program version number
Program Status	display only		program status
Title	display only		program version title
Calendar Type	display only		calendar type
Location Code	display only		program location
Attendance Type	display only		attendance type
Attendance Mode	display only		attendance mode
Unit Set Details Region			
Unit Set Code	display only		unit set code
Version Number	display only		unit set version number
Title	display only		unit set code title
HESA Details Region			
Details Tab			
Mode of Study	optional	list of values	mode of study
Location of Study	optional	list of values	location where program taught
Type of Year Program	optional	list of values	type of year program code
Grading Schema	optional	list of values	program year grade schema
UFI Place	optional	list of values	indicates if student has received University for Industry designated funding
Franchising Activity	optional	list of values	franchising activity

Table 8–98 Program Offering Option Unit Set HESA Details Window Description, Details, Credit Points, and Teaching Tabs

Field Name	Type	Features	Description
Length of Current Year of Program	optional		length of current year of program
Credit Points Tab			
Credit Value of Year of Program 1	optional		credit value of year of program at level of credit 1
Level of Credit 1	optional	list of values	level of credit 1
Credit Value of Year of Program 2	optional		credit value of year of program at level of credit 2
Level of Credit 2	optional	list of values	level of credit 2
FTE Intensity	optional		percentage of full time equivalence used in full time equivalence
FTE Calculation Type	optional	list of values	calculation type
Teaching Period Start Date	optional	pop-up calendar	teaching period start date used in FTE calculation
Teaching Period End Date	optional	pop-up calendar	teaching period end date used in FTE calculation
Teaching Tab			
Other Institutions Providing Teaching 1	optional	list of values	code for institution providing teaching
Other Institutions Providing Teaching 2	optional	list of values	code for institution providing teaching
Proportion Not Taught by this Institution	optional		percentage of course not taught by this institution
Funding Tab			
Fundability Code	optional	list of values	indicates if student fundable by Funding Council
Fee Band	optional	list of values	fee band
Level Applicable to Funding Council HESES	optional	list of values	level applicable to funding council HESES; for example, undergraduate or postgraduate

Table 8–98 Program Offering Option Unit Set HESA Details Window Description, Details, Credit Points, and Teaching Tabs

Field Name	Type	Features	Description
Cost Center Tab			
Cost Center	optional	list of values	cost center code
Description	display only		subject description
Subject	conditionally required	list of values	subject code
Description	display only		subject description
Proportion	conditionally required		percentage of cost center's contribution
Org Unit Tab			
Org Unit	required	list of values	organization unit code
Start Date	display only		organization unit start date
Description	display only		organization unit description
Proportion	required		percentage contribution

8.17 Pattern of Study

8.17.1 Setting Up Program Offering Patterns IGSPS037

An offering pattern enhances the definition of a program offering instance through the assignment of further attributes to the program offering option. These attributes are primarily concerned with the availability of the program offering instance. A program offering instance can have more than one offering pattern.

The program offering pattern notes procedure attaches additional information to program offering patterns in the form of notes.

The following information applies to this procedure:

- Program offering patterns cannot be added if any component of the program offering option is Closed, especially attendance mode and attendance type.
- Program offering patterns cannot be added if the calendar instance in the program offering instance is not Active.

- Program offering patterns cannot be added if the calendar type in the program offering is Closed.
- Program offering patterns cannot be added, modified, or deleted if a program version is Inactive.

Prerequisites

Program Attendance Modes IGSPS005

Attendance Type IGSPS006

Locations IGSOR031

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. Click Program Offering Patterns.
The Program Offering Patterns window appears.
4. Enter data in appropriate fields.
The following information applies to this step:
Location Code, Attendance Mode, and Attendance Type fields are protected against modification. Incorrectly entered data can be deleted provided that the incorrect entry does not have any children records entered against it, and the correct data can be selected in a new record.
5. In the Location Code field, select the appropriate program offering option from the List of values.
6. Optionally, if this program offering option is available for offer to students, select the Offered check box.

7. Optionally, if this program offering is rolled over from a previous version of its calendar, select the Confirmed Offering check box to indicate that the detail of this offering has been checked subsequent to the rollover.
8. Optionally, if this offering pattern is available as an entry point through admissions, select the Entry Point check box.
9. Optionally, if it is desired that units available for enrollment be included in the enrollment, pre-enrollment function for this program offering option, select the Pre-enroll Units check box.
10. Optionally, if this program offering option is a currently valid enrollment option for students, select the Enrollable check box.
11. If this program offering option is available through the interactive voice response (IVR) system, select the Voice Response Available check box.
12. Optionally, in the Minimum field for Entry Assessment Scores, enter the entry assessment score that is the minimum Required for entry to the program offering pattern.

Note: This entry overrides a value entered against the program offering instance.

13. Optionally, in the Guaranteed field for Entry Assessment Scores, enter the entry assessment score that is the minimum Required to guarantee an offer of a position.

Note: This entry overrides a value entered against the program offering instance.

14. Optionally, enter the maximum acceptable cross-credit points in one or more of the following fields:
 - Faculty
 - Location
 - Mode
 - Historical Faculty
15. Optionally, in the Admission Contact field, enter a known person identifier or click Find Person.
16. Optionally, in the Admission Assessment Officer field, enter a known person identifier or click Find Person.

17. In the Grading Schema Code field, select a grading schema for the program offering from the List of values.

The grading schema date range and description are displayed.

Only current or future-dated grading schema can be selected for a program offering pattern.

If entered, the program offering pattern grading schema has precedence over the unit offering option grading schema unless the Unit Grading Schema Precedence check box is selected in the Unit Sections window.

If the program grading schema is used and has precedence over the unit grading schema, recommended grades are translated from the unit grading schema to the program schema. This procedure is performed using the Translate Student Unit Attempt Outcomes job.

18. Save or save and continue as follows:

File > Save or Save and Proceed

8.17.2 Setting Up Program Offering Pattern Notes IGSPS038

The program offering pattern notes procedure enables users to attach additional information to program offering patterns in the form of notes. Users can create notes of many types, with each type reflecting the common purpose of the notes associated with it. Users can create, store, and retrieve notes in almost any format.

The Program Offering Pattern Notes window displays the following information:

- selected program offering pattern context record
- notes for the selected record

For example, users might want to view a program offering pattern context record and associated notes as follows:

1. Users select the program version A300 - Bachelor of Arts, version 1, Standard Academic Year, Falls Creek Campus, Full-Time, On Campus in the Program Ownership window.
2. In the Program Offering Option Admission Categories window, users select the program offering and navigate to the Program Offering Pattern Notes window.
3. The Program Offering Pattern Notes window displays the record and existing notes for A300 - Bachelor of Arts, version 1, Standard Academic Year, Falls Creek Campus, Full-Time, On Campus.

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. In the Calendar Type field, select a calendar type.
4. Enter data in appropriate fields.
5. Click Program Offering Patterns.
The Program Offering Patterns window appears.
6. In the Location Code field, select a location code.
7. Click Program Offering Pattern Notes.
The Program Offering Pattern Notes window appears.
8. Enter data in each field of the Program Offering Pattern Notes window as described in the table.
9. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–99 Program Offering Pattern Notes Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Program Status	Default, display only		Program status

Table 8–99 Program Offering Pattern Notes Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type
Effective Dates	Default, display only		Effective start and date
Title	Default, display only		Program title
Location Code	Default, display only		Location code
Attendance Mode	Default, display only		Describes how a student undertakes a program
Attendance Type	Default, display only		Describes if a student is classified as full-time or part-time
[Data Coordination Check Box]	Optional	Check box	If selected, data in Program Offering Patterns Notes window is automatically refreshed and coordinated with data in the Basic Program Details window; if deselected data in Program Offering Patterns Notes window is refreshed only when the user clicks in Program Offering Patterns Notes region. Leave deselected to speed up performance when querying records.
Program Offering Pattern Notes Region			
Program Note Type	Required	List of values	Program offering pattern notes type
Description	Default, display only		Program offering pattern notes type description
Edit Note		Button	Opens Text Notes window

8.17.3 Setting Up Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.17.4 Setting Up Patterns of Study IGSPS034

Not all programs lend themselves to the use of patterns of study. Programs with no or few prescribed units are in this category. Some programs have a group of compulsory or core units with the rest of the program made up of Optional and elective units. In these cases, the choice can be to include only the prescribed units in the pattern of study; Optional and elective units can be listed as unspecified units. The decision to create patterns of study for particular programs is based on the perceived advantage of doing so. If the program has only a small number of prescribed units, patterns of study are unlikely to provide much advantage.

A pattern of study can be specified to apply to one or more academic periods in advance. This permits a student's pre-enrollment to be performed for either the upcoming academic year or any number of academic years. For example, by specifying a value for number of periods of 1, pre-enrollment takes place only one year in advance. For each academic year covered by the pattern of study, the teaching periods in which pre-enrollment take place are specified in the Pattern of Study Period window and the units to be pre-enrolled in the teaching periods are also entered in the Pattern of Study Period window.

For example, students studying on campus can be offered a different pattern of units from those studying off campus. Full-time on-campus students might typically take X units spread over Y teaching periods, whereas part-time on-campus and off-campus students might take the same X units over 2Y teaching periods. This is reflected in different patterns of study, and therefore different sets of units being pre-enrolled.

Students taking different majors have different unit requirements or unit sets to satisfy their major. The unit requirements can be specified as a pattern of study. Admission calendar is used to limit the pattern of study to a particular admission period. This can apply if incoming midyear students are offered a different pattern of units from that offered earlier incoming students.

Beginning of year and midyear incoming students have the same units in their patterns of study, but the pattern is different because one starts in SEM-1 and the other in SEM-2.

The Location Code, Attendance Mode, Attendance Type, Admission Calendar, Unit Set Code, and Admission Category fields are Optional fields that restrict the applicability of a particular pattern of study. If any of these attributes are specified for a pattern of study, then a value must be specified for that attribute in all other patterns of study for the program offering unless it is a default pattern of study. For example, if a location is specified for a pattern of study, then all other nondefault patterns of study must also have location specified.

Prerequisites

Program Attendance Modes IGSPS005

Attendance Type IGSPS006

Locations IGSOR031

Basic Unit Set Details IGSPS065

Admission Category IGSAD036

Admission Period Calendars IGSAD043

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Offerings > Pattern of Study window

Steps

1. Alternatively, navigate to the Patterns of Study window as follows:
Program Structure and Planning > Basic Program Details
The Basic Program Details window appears.
2. Query the appropriate record.

- 3. Click Program Offering.
- 4. Click Pattern of Study.
The Patterns of Study window appears.
- 5. Enter data in appropriate fields as described in the table.
- 6. Save or save and continue as follows:
File > Save or Save and Proceed

Note: The Patterns of Study window has the following UK Year of Program modifications:

- The Academic Period within Unit Set check box is added
- If selected, indicates pattern of study academic period falls within unit set; if deselected, indicates academic period falls within student enrollment.

Table 8–100 Patterns of Study Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program unique code
Version Number	Default display only		Program version
Program Status	Default display only		Program status
Calendar Type	Default display only		Calendar type
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Patterns of Study region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Patterns of Study region is refreshed only when users navigate to the Number of Periods field in Patterns of Study region. Leave deselected to speed up performance when querying records.
Patterns of Study Region			

Table 8–100 Patterns of Study Window Description

Field Name	Type	Features	Description
Number of Periods	Required		Number of academic periods students are preenrolled each time preenrollment process is run For example, specifying 2 means units are preenrolled in both the upcoming academic year and the following academic year, unless the upcoming period is the final period of the student's program
Location Code	Optional	List of values	Location to which the pattern of study is applicable
Attendance Mode	Optional	List of values	Attendance mode to which the pattern of study is applicable
Attendance Type	Optional	List of values	Attendance type to which the pattern of study is applicable
Admission Calendar	Optional	List of values	Admission calendar to which the pattern of study is applicable
Unit Set Code	Optional	List of values	Unit set code to which the pattern of study is applicable
Latest Approved Academic Calendar Instance		List of values	Latest approved academic calendar instance
Effective Dates	Display only		Latest approved academic calendar instance start and end dates
Admission Category	Optional	List of values	Admission category to which pattern of study is applicable
Always Pre Enroll	Optional	Check box	If selected, enables preenrollment of units; if deselected, preenrollment occurs only if students enrolled in and passed previous academic period units
Academic Period within Unit Set	Optional	Check box	If selected, enables preenrollment process to pick up the next unit set in the academic period
Copy Pattern of Study Detail		Button	Opens a window to enable the details of one pattern of study to be copied to a new pattern of study
Pattern of Study Period		Button	Opens Pattern of Study Period window to define units to be preenrolled for each teaching period
Academic Period within Unit Set	UK	Check box	If selected, indicates pattern of study academic period falls within unit set; if deselected, indicates academic period falls within student enrollment

8.17.5 Setting Up Program Pattern of Studies IGSPS035

Each pattern of study entered in the Patterns of Study window must have details entered in the Program Pattern of Studies window. This detail includes the following:

- against each pattern of study, the teaching periods within the academic periods in which the pattern's units are to be pre-enrolled
- against each teaching period, the units to be pre-enrolled for that teaching period or the unspecified units, such as Optional units and electives, for the teaching period

In the Patterns of Study Periods region of the Program Pattern of Studies window, the academic period numbers are the number of the academic years in which teaching periods are related to this pattern of study; this means that each academic period number corresponds to an academic year in which a student is expected to enroll when progressing normally. The following examples show how academic period numbers can be used:

- **Example 1:** A full-time three-year degree commencing midyear involves teaching periods in academic years 1, 2, 3, and 4. If two or more teaching periods related to the pattern of study, such as semester 1 and semester 2, occur in the same year, then two or more records with the same academic period number must be created.
- **Example 2:** A full-time three-year degree with incoming students at the start of the year involves teaching periods in academic years 1, 2, and 3 only.

Example 1

A number of patterns of study are set up for a three-year full-time program in the Patterns of Study window. One of these has the number of periods set to 1 and the admission calendar set to ADM-PER-2, admission period 2, which is the admission period for the mid-year incoming student. The latest approved academic calendar instance is entered as the academic year 2002. No other attributes are set, meaning that this pattern of study applies to all offerings of the program in ADM-PER-2. With this pattern of study selected, Pattern of Study Period is clicked to navigate to the Program Pattern of Studies window.

Each of the teaching periods for the typical duration of the program is entered against the number of the academic period in which it falls. In this case, the pattern starts with midyear, so against academic period 1 is entered teaching period SEM-2, semester 2. Against academic period 2 is entered both SEM-1 and in the next record SEM-2. This continues until the last record, academic period 4, SEM-1, is entered.

When this pattern of study is used for students admitted to the program in the 1999 instance of ADM-PER-2, the pattern of study applies, as shown in the table.

For each pattern of study period record, the units to be pre-enrolled in the pattern of study period are entered. These units are generally core or mandatory units, but for unspecified units, such as Optional units and electives, the description can be entered. For example, by entering units against academic period 2, SEM-2 in the previous example, when pre-enrollment is performed for the year 2000, students continuing in the program are pre-enrolled in the units.

If the program in this example also has a part-time offering and the institution performs pre-enrollment for part-time programs, then pattern of study periods must be set up for more than four academic periods and the units applicable to each period entered against them. This can be of use only if there is a prescribed pattern of study for the part-time program.

The table describes an example of pattern of study periods for the part-time program.

Table 8–101 Pattern of Study Periods Example 1

Academic Period Number	Meaning	Teaching Calendar Type	Description
1	1999 academic year	SEM-2	SEMESTER 2
2	2000 academic year	SEM-1	SEMESTER 1
2	2000 academic year	SEM-2	SEMESTER 2
3	2001 academic year	SEM-1	SEMESTER 1
3	2001 academic year	SEM-2	SEMESTER 2
4	2002 academic year	SEM-1	SEMESTER 1

Example 2

A program commencing at the start of an academic year includes year-long units and straddle units, which are units commencing in semester 2 and finishing in semester 1 of the following year. The creation of patterns of study for this program uses the same method as for Example 1.

The patterns of study in this case differ in that the year-long and straddle teaching periods must be entered for each academic period number with units offered in these teaching periods. This means that academic period number 1 now has teaching periods SEM-1, SEM-2, YR-LONG, and S2-E1 entered against it. This is repeated for academic period number 2 if it also has year-long and straddle units

commencing it. Against each pattern of study period are entered the units applicable to that period.

The table describes an example of pattern of study periods for the first two years of the full-time program. In this example, patterns of study periods are set up for a full-time program with straddle and year-long units. This example is for students admitted to the program in the 1999 instance of ADM-PER-1.

Table 8–102 Pattern of Study Periods Example 2, First Two Years

Academic Period Number	Meaning	Teaching Calendar Type	Description
1	1999 academic year	SEM-1	SEMESTER 1
1	1999 academic year	SEM-2	SEMESTER 2
1	1999 academic year	YR-LONG	YEAR LONG
1	1999 academic year	S2-E1	START SEM2 - END SEM1 OF FOLLOWING YEAR
2	2000 academic year	SEM-1	SEMESTER 1
2	2000 academic year	SEM-2	SEMESTER 2
2	2000 academic year	YR-LONG	YEAR LONG
2	2000 academic year	S2-E1	START SEM2 - END SEM1 OF FOLLOWING YEAR

The teaching calendar type details enter each of the teaching periods within the academic periods related to the pattern of study. In the previous Example 1 illustrating academic period numbers, year 1, academic periods 1, has only teaching period SEM-2, semester 2, in it. Year 2, academic year 2, has teaching periods SEM-1 and SEM-2, semesters 1 and 2, in it. If straddle units, which are units commencing in semester 2 and finishing in semester 1, or year long units are included in each year of the program, teaching periods such as S2-E1 or YR-LONG can also be entered against academic periods.

For each pattern of study period, the units in which students must be pre-enrolled for that period must be entered. This means that students are pre-enrolled in a particular set of units in academic period 1 - SEM-2 and another set of units for academic period 2 - SEM-1.

Pre-enrollment does not occur for unspecified units, but they can be listed on enrollment forms or included in correspondence sent to students.

The following information applies to this procedure:

- The units must have a least one Active version. Validation messages advise if there are no unit offering options of a unit in future pattern of study details with matching location or class.
- A unit is not typically entered against more than one pattern of study period unless its Repeatable check box is selected.
- For each pattern of study period record, a unit code or description must be inserted, but not both. The Description field is typically used to enter unspecified units such as options and electives.

Prerequisites

Unit Categories IGSPS041

Unit Section Details IGSPS083

Calendar Relationships IGSCA004

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Offerings > Pattern of Study window

Steps

1. Enter data in appropriate fields.
2. Query a program offering.
3. Select a pattern of study.
4. Click Pattern of Study Period.

The Program Pattern of Studies window appears.

5. In the Academic Period Number field, enter the number of academic years in which teaching periods relate to this pattern of study.
6. In the Teaching Calendar Type field, enter a teaching calendar from the List of values.
7. Optionally, in the Description field, enter a description for the pattern of study period, such as YEAR1 - SEMESTER 1.

8. In the Unit Code field, enter a valid value or select the appropriate unit code from the List of values.

9. Optionally, in the Location Code field, enter a valid value or select a location from the List of values.

If location is specified, it is used by the pre-enrollment process, if matching unit offering options exist, to select the unit offering option in which to pre-enroll students. If not specified, the pre-enrollment process uses an algorithm to determine in which, if any, unit offering option to enroll students.

10. Optionally, in the Unit Class field, enter a valid value or select a unit class from the List of values.

If class is specified, it is used by the pre-enrollment procedure, if matching unit offering options exist, to select the unit offering option in which to pre-enroll students. If not specified, the pre-enrollment procedure uses an algorithm to determine in which, if any, unit offering option to enroll students.

11. In the Description field, enter a description for the unit.

In addition to entering specific units, unspecified units, such as Optional units or electives, can be listed by entering only a description as a pattern of study unit record. For example, a single record, Two Electives, can be inserted, or two separate records, Elective 1 and Elective 2, can be inserted.

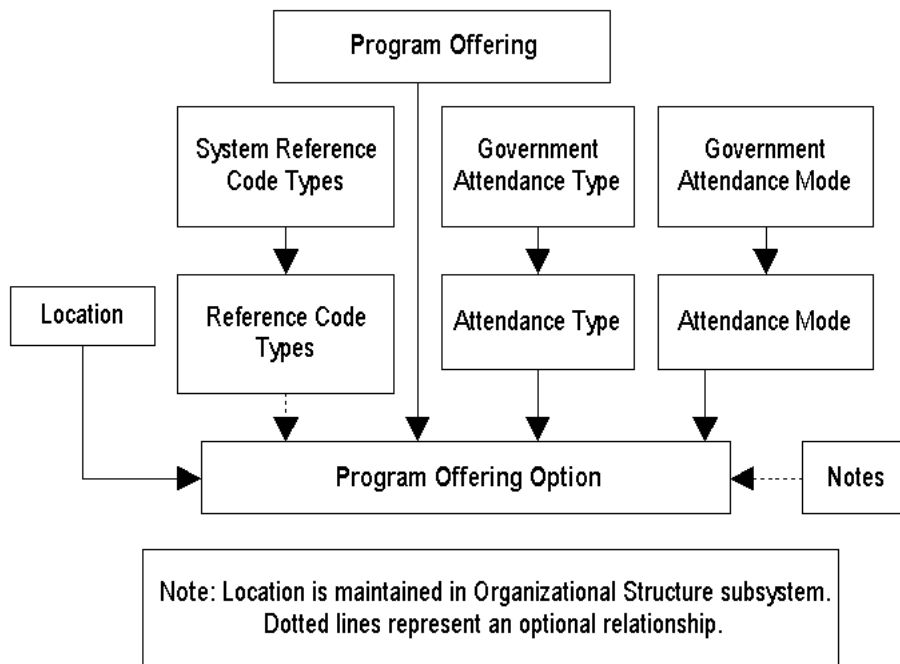
12. Select Core Unit check box to indicate core units

13. Save or save and continue as follows:

File > Save or Save and Proceed

8.18 Program Offering Option

Figure 8–11 shows the relationships required to define a program offering option.

Figure 8–11 Relationships Required to Define Program Offering Options

Note: Not all reference data is applied directly to program versions. Program offering options are also built from a number of data elements.

8.18.1 Setting Up Program Offering Options IGSPS032

The Program Offering Options procedure defines the manner in which a program is studied by specifying the attendance mode, for example, On Campus, Off Campus, Web Based Learning, or Distance Learning, and the attendance type, for example, Full Time, Half Time, or Quarter Time. A program offering can have more than one offering option.

The program offering option notes procedure attaches additional information to program offering options in the form of notes.

You can mark program offering options for deletion. Closed program offering options will not show up in the lists of values in any window.

Prerequisites

Program Attendance Modes IGSPS005

Attendance Type IGSPS006

Locations IGSOR031

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Note: The Program Offering Option window is non-modal. That means that you do not have to close the window in order to go back to Basic Program Details.

For example, when you query B.Art in Basic Program Details, in the Program Offering Option window, the program B.Art will be defaulted in.

However, if the you return to Basic Program Details and re-query another program B.HST, and open up Program Offering Option window, then there will be 2 program offering option windows opened; 1 with the B.Art in context and 1 with B.HST in context.

Steps

1. Click **Program Offering**.

The Program Offerings window appears.

2. Query the appropriate record.

3. Click **Program Offering Options**.

The Program Offering Options window appears.

4. Enter data in each field of the Program Offering Options window as described in the table.

5. Save or save and continue as follows:

File > Save or Save and Proceed

Table 8–103 Program Offering Options Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Program Status	Default, display only		Program status
Title	Default, display only		Program title
Calendar Type	Default, display only		Calendar type
Program Offering Options Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Program Offering Options window is automatically refreshed and coordinated with data in the Program Offerings window; if deselected data in Program Offering Options window is refreshed only when the user clicks in Program Offering Options region. Leave deselected to speed up performance when querying records.
Location Code	Required	List of values	Location code
Attendance Mode	Required	List of values	Describes how a student undertakes a program
Attendance Type	Required	List of values	Describes if a student is classified as full-time or part-time
Time Limitation	Optional		Number of years the program offering option can be offered
Program Length Measurement	Optional		Program length measurement; required if program length is entered
Program Length	Optional	List of values	Valid values include 10th of a year, days, hours, minutes, months, weeks and year.
Forced Location	Optional	Check box	If selected, indicates that the selected location is the only one where units of the program offering can be taken

Table 8–103 Program Offering Options Window Description

Field Name	Type	Features	Description
Forced Attendance Mode	Optional	Check box	If selected, indicates that the selected attendance mode is the only one in which units of the program offering can be taken
Forced Attendance Type	Optional	Check box	If selected, indicates that the selected attendance type is the only one for the program offering
Enrollment Officer	Required		Enrollment officer code and name
Find Person icon		Icon	Find Person icon
[Descriptive Flexfield]	Optional		User-customization field
Program Offering Option Admission Categories		Button	Opens Program Offering Option Admission Categories window
Program Offering Option Notes		Button	Opens Program Offering Option Notes window
Program Offering Option Unit Sets		Button	Opens Program Offering Option Unit Sets window
Program Entry Point Reference Codes		Button	Opens Program Entry Point Reference Codes window
Program Offering Option HESA Details		Button	Opens Program Offering Option HESA Details window

Guidelines

The program length and unit of length fields have been moved from the program level to the program offering option level. You must manually enter the program length and unit of length fields for all existing programs.

8.18.2 Setting Up Program Entry Point Reference Codes IGSPS033

Each program offering option is uniquely identified by a program code, version number, calendar type, location code, attendance mode, and attendance type. The Program Entry Point Reference Codes window enables users to enter and maintain the codes used by other systems or organizations to identify a program offering option, such as VTAC.

Program entry point reference codes are defined by specifying the reference code type of the entry point reference code and a unique reference code. Note that

reference code types map to system reference code types. Unit set can also be attached to entry points. Whenever a new program offering option is created, the mandatory reference types and the default reference code are created. These mandatory reference types cannot be deleted or updated. The reference codes can be modified if Required.

Prerequisites

Reference Code Types IGSPS011

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Enter or query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. Click Program Offering Options.
The Program Offering Options window appears.
4. Click Program Entry Point Reference Codes.
The Program Entry Point Reference Codes window appears.
5. Enter data in each field of the Program Entry Point Reference Code window as described in the table.
6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–104 Program Entry Point Reference Codes Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Program Status	Default, display only		Program status
Title	Default, display only		Program title
Calendar Type	Default, display only		Program calendar type and description
Location Code	Default, display only		Program location code
Attendance Mode	Default, display only		On campus or off-campus
Attendance Type	Default, display only		Full time or part-time
Program Entry Point Reference Codes Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Program Entry Point Reference Codes window is automatically refreshed and coordinated with data in the Basic Program Details window; if deselected, data in Program Entry Point Reference Codes window is refreshed only when the user clicks in Program Entry Point Reference Codes region. Leave deselected to speed up performance when querying records.
Reference Code Type	Required	List of values	Program reference code classification Note: If the reference code type is mapped to a system reference code type of Crsofstudy, an existing program code can be used as a reference code. In this case, the program code is validated and the description is automatically inserted. Reference codes that are not valid program codes can also be used.

Table 8–104 Program Entry Point Reference Codes Window Description

Field Name	Type	Features	Description
Reference Code	Required	List of values	<p>Program reference code</p> <p>Note: If any component of a program offering option, that includes calendar type, location, attendance type, or mode is closed, a program entry point reference code cannot be entered against it.</p> <p>Note: A program entry point reference code cannot be inserted, modified, or deleted against an Inactive program version. Only reference codes that are not being used in program version definitions can be changed or deleted. Reference codes are usually changed only to correct a data error.</p>
Unit Set Code	Optional	List of values	Unit set code
Unit Set Version	Display only		Unit set version
Unit Set Category	Display only		Institution-defined unit set category
Unit Set Status	Display only		Unit set status
Description	Display only		Reference code description

8.18.3 Setting Up Program Offering Option Notes IGSPS036

Prerequisites

Program & Unit Note Types IGSPS069

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Program Offering.
The Program Offerings window appears.
3. Click Program Offering Options.

The Program Offering Options window appears.

4. Query and enter data in the appropriate fields.
5. Click Program Offering Option Notes.

The Program Offering Option Notes window appears.

6. Enter data in each field of the Program Offering Option Notes window as described in the table.
7. Save or save and continue as follows:
File > Save or Save and Proceed.

Table 8–105 Program Offering Option Notes Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Calendar Type	Default, display only		Calendar type
[Description]	Default, display only		Description of the calendar type
Program Status	Default, display only		Program status
Title	Default, display only		Program title
Attendance Mode	Default, display only		Describes how student undertakes a program
Attendance Type	Default, display only		Describes whether student is classified as full-time or part-time
Program Offering Option Notes Region			

Table 8–105 Program Offering Option Notes Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in Program Offering Option Notes window is automatically refreshed and coordinated with data in the Program Offering Options window; if deselected data in Program Offering Option Notes window is refreshed only when the user clicks in Program Offering Option Notes region. Leave deselected to speed up performance when querying records.
Program Note Type		List of values	Program offering options note type
Description	Default, display only		Program offering options notes type description
Edit Note		Button	Opens Text Notes window

8.18.4 Setting Up Text Notes IGSGE004

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: The label for the field at the left-hand side of a window used to access note functionality varies, depending on context.

To create or edit a note, perform the following steps.

1. Enter or modify descriptive texts in In the field of the Text Notes window, enter or modify descriptive text.
2. Enter data. Save your work.

8.18.5 Setting Up Program Offering Option Admission Categories IGSPS030

Admission category restrictions can be applied to program offering options. The purpose is to limit the admission categories for which admission applications for particular program offerings can be placed. When an admission application is processed, one of the following occurs:

- The admission application is assigned the admission category of the session details because that admission category is one of those to which the program offering is restricted.
- The admission application is assigned the admission category of the session details because the program offering option is not restricted to any particular admission category.
- An error message advises that the admission application cannot be entered under the current admission category. In this case, the session details can be changed to permit processing of the application, or the application can be removed from processing for later resolution.

In the Program Offering Option Admission Categories window, the user can select a default admission category in cases where it is Required to automatically determine an admission category for a program offering option. For example, during the Government offer load procedure, each application is assigned the default admission category for its subject program offering option.

Users set restrictions on admission categories to which applications for a program offering can be placed. Once set users can assign only one of the restricted admission categories to the application in the Session Details window. If users set no restrictions, an application is assigned the admission category of the session details.

Users can set further restrictions on unit sets for admission categories to which applications for a program offering can be placed.

Prerequisites

Admission Category IGSAD036

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

- 1. Query the appropriate record.
- 2. Click Program Offering.
The Program Offerings window appears.
- 3. Click Program Offering Options.
The Program Offering Options window appears.
- 4. Click Program Offering Option Admission Categories.
The Program Offering Option Admission Categories window appears.
- 5. Enter data in appropriate fields in the table.
- 6. Save or save and continue as follows:
File > Save or Save and Proceed

Table 8–106 Program Offering Option Admission Categories Window Description

Field Name	Type	Features	Description
Program Code	Default display only		Program code
Version Number	Default display only		Program version number
Program Status	Default display only		Program status
Calendar Type	Default display only		Calendar type
Title	Default display only		Program title
Location Code	Default display only		Program location code
Attendance Mode	Default display only		Program attendance mode
Attendance Type	Default display only		Program attendance type

Table 8–106 Program Offering Option Admission Categories Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Admission Categories region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Admission Categories region is refreshed only when users navigate to Admission Category field in the Admission Category region. Leave deselected to speed up performance when querying records.
Admission Categories Region			
Admission Category	Required	List of values	Program offering option admission category
Description	Display only		Admission category description
System Default	Optional	Check box	If selected, indicates default admission category
Admission Category Unit Set Restrictions Region			
Unit Set Code	Required	List of values	Unit set code
Version Number	Display only		Unit set version
Title	Display only		Unit set title

8.19 Cross Listed and Meet With Unit Sections

8.19.1 Setting Up Unit Cross-Listing Group IGSPS112

The cross-listed unit groups procedure enables users to create cross-listed unit groups. Cross-listing of units is indicated even though the unit itself might be different, but the content and characteristics of the classes are the same as a group. Cross-listing of units provides users with wider option of choice. For example, if there are five units in a cross-listed unit group, student can opt for any one of those units.

Users can create cross-listing at unit and unit section level. Units in a cross-listed group are inherited by unit sections that the user specifies for inheritance. Users can also manually create cross-listings at unit section level. A unit in the cross-listed

group is selected as parent. Parent unit details are used for scheduling and teaching purposes.

Note: The Cross-Listed Units Groups window can also be accessed from Basic Unit Details window in query mode. Once a unit or unit section is assigned to a cross-listed group, it cannot be placed into another group.

If the Unit Cross Listed group is not inherited down to the Unit Section level. Enrollment will not recognize the units as cross listed.

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Cross-Listed Units Groups window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–107 Cross-Listed Units Groups Window Description

Field Name	Type	Features	Description
Unit Cross-Listed Group Name	Required		Unique name of the cross-listed unit group
Maximum Enrollment for the Group	Display only		Total maximum student enrollment for all units in the group
Location Inheritance	Optional	Check box	If selected, all children will use the location of the parent; if deselected, each of the child units must have its own location, building, and room assigned
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Cross-Listed Units region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Cross-Listed Units region is refreshed only when the user navigates to the Unit field in the Cross-Listed Units region. Leave deselected to speed up performance when querying records.
Cross-Listed Units Region			

Table 8–107 Cross-Listed Units Groups Window Description

Field Name	Type	Features	Description
Unit		List of values	Unit name Note: Once included in a cross-listed group, unit does not appear in the list of values for the next unit name.
Enrollment Maximum	Display only		Maximum enrollment available for the unit; equivalent to the sum of all units' maximum enrollment number
Parent	Required	Check box	Parent unit Note: Only one unit can be a parent in a cross-listed group. Once selected for a unit, disables all other check boxes.
Inheritance		Button	Opens Inheritance Parameters window

8.19.2 Setting Up Unit Section Cross-Listed Group IGSPS113

The Unit Section Cross Reference procedure allows the user to query, define, and maintain the cross-listing of unit sections.

Prerequisites

Calendar Types IGSCA002

Basic unit section details IGSPS083

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Meet With / Cross Listed Group> Cross-Listed Unit Sections Group window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 8–108 Cross-Listed Unit Sections Group Window Description

Field Name	Type	Features	Description
Location Inheritance	Optional	Check box	If selected, indicates that the children is allocated the same location: if deselected, indicates that the children is allocated a different location
Unit Section Cross-Listed Group Name	Default, display only		Unit section cross listed group name
Maximum Enrollment for the Group	Default, display only		Sum of all the maximum enrollments for all the units under the group
Group Override Maximum	Optional		Group override maximum
Actual Enrollment for the Group	Display only		Actual number of students enrolled in group
Calendar Type	Required	List of values	Calendar type
Alternate Code	Display only		Alternate unit code
Effective Dates	Display only		Teaching period start and end dates
Cross Listed Unit Sections Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Cross-Listed Unit Sections window is automatically refreshed and coordinated with data in the Unit Section Details window; if deselected, data in the Cross-Listed Unit Sections window is refreshed only when the user clicks in the Cross-Listed Unit Sections region. Leave deselected to speed up performance when querying records.

Table 8–108 Cross-Listed Unit Sections Group Window Description

Field Name	Type	Features	Description
Unit Section	Required	List of values	Unit Code, Unit Class, Location, and Teaching Period
Maximum Enrollment	Display only		Maximum enrollment for unit section that is part of the cross listed group
Parent	Required	Check box	Parent for all the unit sections that is part of the cross listed group Note: Only one parent can be selected for each cross listed unit section group. A parent unit section cannot be deleted unless some other unit section is made the parent.

8.19.3 Setting Up Meet with Classes IGSPS110

Users can select the unit section that can be scheduled for each meet with classes groups. A unit section is identified as a host within each meet with classes group.

The meet with classes procedure enables users to create meet with class groups and select unit sections that can be scheduled for meet with classes group.

Prerequisites

Unit Section Details IGSPS083

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Meet With / Cross Listed Group > Meet With Classes Group window

Steps

Enter data in each field of the window as described in the table. Save your work.

Note: To display the fields in the Meet With Unit Section region with a query, check the Meet With Unit Section check box.

Table 8–109 Unit Section Occurrences Meet with Classes Group Window Description

Field Name	Type	Features	Description
Meet with Group Name	Required		Meet with group name; must be unique
Maximum Enrollment for the Group	Required		Maximum number of participants allowed in group
Actual Enrollment for the Group	Display only		Actual enrolled number of students for group
Calendar Type	Required	List of values	Calendar type associated with group Note: Depending on the calendar type selected, the Alternate Code and Effective Dates are automatically populated.
Alternate Code	Default		Alternate code associated with calendar type
Effective Dates	Default		Effective dates for calendar type
Meet With Unit Section Region			
Unit Section	Required	List of values	Unit sections associated with calendar type
Maximum Enrollment	Required		Maximum enrollment allowed for the unit section
Host	Optional		If selected, indicates that a unit section is a host Note: Only a single host can be assigned for each meet with class group. A unit section selected as the host cannot be deleted unless an alternate unit section is made the host.

8.19.4 Setting Up Meet with Exams Group IGSPS111

A unit section is identified as the host within each meet with exam group. The host's information is used for the meet with exams group. All other unit sections within the meet with exams group are considered as guests and will share the host's information.

For example, the building and room of the host is used for scheduling. Therefore, the guests will also have the same building and room as the host for the exam.

The meet with exams procedure enables users to create meet with exams group. It also enables users to select unit sections that are to be scheduled together for an examination.

Prerequisites

Calendar Types IGSCA002

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Meet With/Cross-Listed Group > Meet With Exams Group window

Steps

Note: User can only query the fields if this window is accessed from the Unit Section Assessments window.

1. In the Meet With Exams Group Name field, enter a unique name.
2. In the Calendar Type field, select a calendar type from the list of values.
3. In the Unit Section Assessments field, enter a unit section from the list of values.

Each unit section can only be applied to one exam group meeting.

4. To appoint a unit section as a host, select the host check box.

Only a single host is assigned for each meet with exams group.

A unit section selected as the host cannot be deleted unless some other unit sections is made the host.

5. Save your work.

8.20 Rules

8.20.1 Program Version Rules

Rules for program versions are unique to the program code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The program version rules determine whether the program requirements are satisfied and whether the program requirements for an honors level are met. They are also used to derive the Commencing Student Indicator for the Statistics windows. Program version rules are viewed in the Program Version Rules window.

The following table describes program version rule operators. They are used with all program version rule operators.

Table 8–110 Program Version Rule Operators

Operator	Definition	Example	Result
()	parenthesis, to force execution order	(Must pass 20 credit points AND Must complete special requirement of type First Aid) OR Must pass credit points for program with no more than 4 credit points of pass conceded is not the same as Must pass 20 credit points AND (Must complete special requirement of type First Aid OR Must pass credit points for program with no more than 4 credit points of pass conceded)	N/A
{ }	start and end of definition	Set of Articulated Programs {A300, A313, A316}	N/A
.	separator between program or unit codes	Threshold of 12 must have units {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}	N/A
-	separator between program or unit code and version number, or between grading schema code and grade	Set of Articulated Programs {A300, A313, A316.2}	only considers program A316, version 2
[]	start and end of version number set	Set of Articulated Programs {A300, A313, A316.[1-3,5]}	only considers program A316, versions 1 to 3 or version 5

Table 8–110 Program Version Rule Operators

Operator	Definition	Example	Result
-	range of program or unit version numbers	Set of Articulated Programs {A300, A313, A316.[1-3,5]}	only considers program A316, versions 1 to 3 or version 5
%	used to select multiple codes	{A%} for all units that start with A	N/A
AND	logical and	Must complete credit points for program with no more than 1 credit point of pass conceded AND Must complete 4 units in {ADH601, ADH602, ADH603, ADH604, ADH605}	N/A
OR	logical or	Must complete 4 units in {ADH601, ADH602, ADH603, ADH604, ADH605} OR Must complete 4 units in {ABF101, ABF102, ABF103, ABF104, ABF105, ABF106}	N/A

The following table describes articulated programs rule syntax. The articulated programs rule is used to derive the Commencing Student Indicator. The articulated programs rule is defined at a higher program level. For example, if a student is admitted to a Master's honors program, or transfers there from a Master's pass program, the rule is defined at the Master's honors level and includes the Master's pass programs.

Table 8–111 Articulated Programs Rule Syntax

Syntax	Definition	Example	Result
Set of Articulated Programs { }	student admitted to or transferred to Master's honors or Bachelor's honors program and enrolled in institution or previous institution, in related Master's or Bachelor's pass program	Set of Articulated Programs {A300}	if defined for program A400, then student admitted to A400 who completes A300 or transfers from A300 is commencing

The following table describes articulated programs rule variables.

Table 8–112 Articulated Programs Rule Variables

Variable	Definition	Example	Result
Program Code	program code	{A300, A4%, %314}	includes program A300, all programs that start with A, and all programs that end in 314

The following table describes program version completion rule syntax. The program version completion rule is used by the Progression functionality to identify students who complete all applicable program requirements and are eligible to graduate and receive the program award.

Table 8–113 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must pass <numeric value> credit points	N/A	student achieves or exceeds specified number of credit points for program stage	Must pass 24 credit points
N/A	at level <numeric value> with no more than <numeric value> credit points of pass conceded [from units owned or not owned by {Org Unit Code}]	student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must pass 12 credit points at level 1 Must pass 12 credit points at level 1 with no more than 2 credit points of pass conceded
N/A	in { } with grade of at least <Grading Schema.Grade>	student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C

Table 8–113 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
N/A	not in { }	student achieves specified number of credit points from units other than those in braces; valid codes are entered in braces	Must pass 4 credit points not in {MAA214, MAA303}
N/A	with no more than <numeric value>	student achieves or exceeds specified number of credit points for student program attempt; qualified by specified pass conceded grade	Must pass 24 credit points with no more than 4 credit points of pass conceded
N/A	units in { } with grade of at least <Grading Schema Code.Grade>	student passes, or is granted advanced standing for, specified number of units in specified set; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 2 units in {ADH601, ADH602, ADH603, ADH604} Must pass 2 units in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C
N/A	units not in { }	student passes, or is granted advanced standing for, specified number of units other than those in list of unit codes; valid unit code or set of codes is entered in braces	Must pass 4 units not in {ADH601, ADH602, ADH603, ADH604}
N/A	units with no more than <numeric value> units in { }	student passes, or is granted advanced standing for, specified number of units, but with no more than the specified number of units from those in unit code list; valid unit code or set of codes is entered in braces	Must pass 5 units with no more than 2 units in {ADH601, ADH602, ADH603, ADH604}
Must pass all units in { }	N/A	student passes, or is granted advanced standing for, all units; qualified with valid unit code or set of codes inside braces	Must pass all units in {ADH601, ADH602, ADH501}

Table 8–113 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must pass credit points for program	N/A	credit points for student program attempt must equal or exceed number of credit points required for program version; no additional qualifier required because number of credit points required for program version is retrieved from system	Must pass credit points for program
Must pass credit points for program with no more than <numeric value>	credit points of pass conceded credit points in unit codes	for student program attempt, student must equal or exceed number of credit points required for program version with no more than specified number of credit points with pass conceded grade	Must pass credit points for program with no more than 3 credit points of pass conceded
Must complete special requirement of type <Special Requirement Code>	N/A	student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requirement of type First Aid
Must complete stage of type <Program Stage Code>	N/A	student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03

Table 8–113 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must have program grade point average equal to or greater than <numeric value>	N/A	student has grade point average (GPA) equal to or greater than the specified numeric value	Must have a GPA equal to or greater than 5
Must have program weighted average mark equal to or greater than <numeric value>	N/A	student has program weighted average mark (WAM) equal to or greater than the specified numeric value	Must have a WAM equal to or greater than 80
Must have completed <numeric value>	N/A	student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	N/A
N/A	primary unit sets of category <Unit Set Category>	tests if specified number of primary unit sets from selected category are complete	Must have completed 1 primary unit sets of category Major
N/A	unit sets in { }	tests if specified number of unit sets are complete; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}

Table 8–113 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
N/A	unit sets of category <Unit Set Category>	tests if specified number of unit sets from selected category are complete; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor
Must not exceed <numeric value>	N/A	in this student program attempt, student must not exceed the specified numeric value of credit points or units, or the numeric value percent of credit points or units, with conceded passes	N/A
N/A	% credit points with conceded passes	tests if number of credit points gained for units with conceded passes exceeds specified percentage of student's total credit points for program attempt	Must not exceed 12% credit points with conceded passes
N/A	% units with conceded passes	tests if number of units with conceded passes exceeds specified percentage of student's total passed units for program attempt	Must not exceed 15% units with conceded passes
N/A	credit points with conceded passes	tests if number of credit points gained for units with conceded passes exceeds specified number for program attempt	Must not exceed 4 credit points with conceded passes
N/A	units with conceded passes	tests if number of units with conceded passes exceeds specified number for program attempt	Must not exceed credit points with conceded passes

The following table describes program version completion rule variables.

Table 8–114 Program Version Completion Rule Variables

Variable	Definition	Example
numeric value	number	Must complete 24 credit points

Table 8–114 Program Version Completion Rule Variables

Variable	Definition	Example
Unit Code	currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	currently defined grading schema code	with grade of at least Standard.C
Grade	currently defined grade within grading schema	with grade of at least Standard.C
Special Requirement Code	currently defined special requirement code	Must complete special requirement of type First Aid
Program Stage Code	currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	currently defined unit set category	Must have completed 1 primary unit sets of category Major

The following table describes honors level rule syntax. The honors level rule is used by the Progression and Graduation windows to identify students who achieve a specified program grade point average and who are eligible to receive a specified honors level.

Table 8–115 Honors Level Rule Syntax

Syntax	Definition	Example	Result
IF Program GPA >= <numeric value> THEN <Honors Level Code>	evaluates student's program grade point average	IF Program GPA >= 4 THEN D	if true, student is awarded specified honors level
ELSE	allows addition of another statement to existing statement	IF Program GPA >= THEN D ELSE IF Program GPA >= 3.75 THEN H1	N/A

The following table describes honors level rule variables.

Table 8–116 Honors Level Rule Variables

Variable	Definition	Example
numeric value	number	IF Program GPA >= 3.5 THEN H1A
Honors Level Code	institution-defined code representing honors level to be awarded	IF Program GPA >= 4 THEN D ELSE IF Program GPA >= 3.75 THEN H1

The following table describes core rule syntax. The core rule allows a preliminary progression rule to be created, and allows institutions to specify the units that must be achieved once a student satisfies the number of credit points indicated as the threshold.

Table 8–117 Core Rule Syntax

Syntax	Definition	Example
Threshold of <numeric value> must have units { }	student must satisfy all units defined in set once he or she achieves threshold number of credit points for program	Threshold of 12 must have unit {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}
)	N/A	N/A
(	N/A	N/A
OR	N/A	N/A

The following table describes core rule variables.

Table 8–118 Core Rule Variables

Variable	Definition	Example
numeric value	number	Threshold of 12 must have unit {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}

Table 8–118 Core Rule Variables

Variable	Definition	Example
Unit Code	currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121

8.20.1.1 Setting Up Program Version Rules IGSPS039

Users can attach rules to a program version in the Program Version Rules window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Version Rule.
The Program Version Rules window appears.
4. Optionally, navigate as follows:
Program Structure and Planning > Program > Program Version Rules
The Program Version Rules window appears.
5. Enter data in appropriate fields.
6. Query the rule.
If there is no rule entered for a program version, Undefined is displayed adjacent to the rule description.
7. To edit a rule, place the cursor in the Rule Description field of the selected rule.
8. Click Edit Rule.
The Rule window appears.

- 9. Save or save and continue as follows:
File > Save or Save and Proceed

8.20.2 Program Stage Rules

Rules for program stages are unique to the program code, version number, and program stage. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The program stage rules determine whether the requirements for a stage of a program are met. Program stage rules are viewed in the Program Stages window.

The completion rule is used by the Progression windows to identify students who complete all applicable requirements for a program stage.

In evaluating the completion of a program stage, other stages that make up the total program are not considered. For example, a three stage program can require a student to achieve eight credit points for Stage 1, eight credit points for Stage 2, and ten credit points for Stage 3. The rule for Stage 2 is written to require a student to achieve 16 credit points.

The following table describes program stage completion rule syntax.

Table 8–119 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
Must complete <numeric value> credit points	N/A	student achieves or exceeds specified number of credit points for program stage	Must complete 8 credit points	returns true if student has 8 or more credit points or advanced standing

Table 8–119 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
N/A	at level <numeric value> with no more than <numeric value> credit points of pass conceded	student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must complete 8 credit points at level 1 Must complete 8 credit points at level 1 with no more than 2 credit points of pass conceded	second example returns true if student has 8 or more credit points at level 1 and maximum of two of 8 credit points achieved through special Pass Conceded grade
N/A	in { } with grade of at least <Grading Schema.Grade>	student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must complete 3 credit points in {ADH601, ADH603, ADH604} Must complete 3 credit points in {ADH601, ADH603, ADH604} with grade of at least Standard. C	second example returns true if student achieves 3 credit points from listed units, with at least a credit result

Table 8–119 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
N/A	with no more than <numeric value>	student achieves or exceeds specified number of credit points for student program attempt; qualified by specified pass conceded limit	Must complete 8 credit points with no more than 2 credit points of pass conceded	returns true if student has 8 or more credit points, and maximum of 2 of 8 credit points achieved through Pass Conceded grade
Must complete <numeric value> units in { } with grade of at least <Grading Schema Code.Grade>	N/A	student passes, or is granted advanced standing for, specified number of units; valid unit code or set of codes are entered in braces; qualified with minimum grade value selected from grading schema	Must complete 2 units in {ADH601, ADH602, ADH603, ADH604} Must complete 2 units in {ADH601, ADH602, ADH603, ADH604} with grade of at least Standard. C	second example returns true if student completes 2 units, with at least a credit result
Must complete all units in { }	N/A	student passes, or is granted advanced standing for, all units; qualified with valid unit code or set of codes inside braces	Must complete all units in {ADH601, ADH602, ADH501}	returns true if student completes all listed units

Table 8–119 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
Must complete special requirement of type <Special Requirement Code>	N/A	student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requirement of type First Aid	returns true if student has current First Aid certificate
Must complete stage of type <Program Stage Code>	N/A	student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03	N/A
Must have completed <numeric value>	N/A	student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	N/A	N/A

Table 8–119 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
N/A	primary unit sets of category <Unit Set Category>	tests if specified number of primary unit sets from selected category are complete	Must have completed 1 primary unit sets of category Major	N/A
N/A	unit sets in { }	tests if specified number of unit sets are complete; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}	N/A
N/A	unit sets of category <Unit Set Category>	tests if specified number of unit sets from selected category are complete; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor	N/A

The following table describes program stage rule operators.

Table 8–120 Program Stage Completion Rule Operators

Operator	Definition	Example
()	parentheses, to force execution order	(1+3)/4 is not the same as 1+3/4
{ }	start and end of unit or unit set definition	{ACC-MAJ1, ACC-MIN2}
,	separator between unit or unit set codes	{ACC-MAJ1, ACC-MIN2}

Table 8–120 Program Stage Completion Rule Operators

Operator	Definition	Example
.	separator between unit or unit set code and version number	{ACC-MAJ1.2, ACC-MIN2.3}
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
%	used to select multiple units or other codes	{A%} for all units that start with A
AND	logical and	(Must complete 3 credit points AND Must complete special requirement of type First Aid) OR Must complete 5 credit points
OR	logical or	(Must complete 3 credit points AND must complete special requirement of type First Aid) OR Must complete 5 credit points

The following table describes program stage rule variables.

Table 8–121 Program Stage Completion Rule Variables

Variable	Definition	Example
numeric value	number	Must complete 24 credit points
Unit Code	currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	currently defined grading schema code	with grade of at least Standard.C
Grade	currently defined grade within grading schema	with grade of at least Standard.C
Special Requirement Code	currently defined special requirement code	Must complete special requirement of type First Aid

Table 8–121 Program Stage Completion Rule Variables

Variable	Definition	Example
Program Stage Code	currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	currently defined unit set category	Must have completed 1 primary unit sets of category Major

The following table describes operators for test score rules.

Table 8–122 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	N/A
{	N/A
Valid Test Type	User enters a valid Test Type code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	N/A
with a composite score	Student composite test results are entered on IGSAD045 Direct Admissions.
greater than, greater than or equal to, less than, or less than or equal to	Scores are numeric so users may create comparative statements for them.
a number*	user enters a number representing the test score
Parse Successful or AND or OR	User can end rule or create additional unit version rules
Example	Must have achieved test type of {SAT1} with a score >= 550. Must have achieved test type of {SAT1} with a score greater than or equal to 550 OR Must have earned

The following table shows additional test score rule operators.

Table 8–123 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	N/A

Table 8–123 Test Score Rule Operators

Operator	Definition
{	N/A
Valid Test Type	user enters TEST TYPE code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	N/A
with a grade	Student test results are entered on IGSAD045 Direct Admissions.
equal to or not equal to	Grades are user defined values such as EXCELLENT, POOR, PASS, FAIL. Users must indicate which grades are not are not valid to fulfill the prerequisite statement.
{	N/A
a grade*	User enters a valid grade
, or }	User can enter more than one grade. Multiple grades are separated by commas.
Parse Successful or AND or OR	User can end rule or create additional unit version rules
Example:	Must have achieved test type of {Writing Proficiency} with a grade equal to {PASS}

The following table shows additional test score rule operators.

Table 8–124 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	N/A
{	N/A
Valid Test Type	User enters TEST TYPE code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	N/A
and a test segment of	N/A
{	N/A

Table 8–124 Test Score Rule Operators

Operator	Definition
Valid Test Segment Name	User enters valid Test Segment code. If partial code is entered, list of matching codes is displayed. Test Segments are attached to Test Types and are setup on IGSAD025 Admission Test Types.
}	N/A
with a segment test score	Student test segment results are entered on IGSAD045 Direct Admissions.
greater than, greater than or equal to, less than, or less than or equal to	Scores are numeric so users may create comparative statements for them.
a number*	user enters a number representing the test score
Parse Successful or AND or OR	User can end rule or create additional unit version rules
Example:	Must have achieved test type of {SAT1} and a test segment of {Verbal} with a composite score greater than 700.

The following table shows additional test score rule operators.

Table 8–125 Test Score Rule Operators

Operator	Definition
Must have achieved placement of	N/A
{	N/A
Valid Unit Code	User enters Unit code. If partial code is entered, list of matching codes is displayed. Unit Test placements are based on setup data from IGSAD060 Unit Placement and are displayed on IGSAD065 View Unit Placement Details.
}	N/A
Parse Successful or AND or OR	User can end rule or create additional unit version rules
Example:	Must have achieved placement of {SPANISH101} or Must have taken (SPANISH001).

The following table describes operators for program rules.

Table 8–126 Program Rule Operators

Operator	Definition
Must be enrolled in	N/A
{	N/A
a program	User enters valid Program code. If partial code is entered, list of matching codes is displayed. On validation the system will check for program attempts with statuses equal to Enrolled, Inactive, and Completed. Program Attempts with statuses of Unconfirmed, Discontinued, Intermitted and Lapsed will not satisfy the prerequisite rule.
, or }	User can enter more than one Program Code. Multiple codes are separated by commas.
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A
)	N/A
OR	N/A
Example:	Must be enrolled in {BAHIST} Must be enrolled in {BAHIST, BAPOLSCI, BAPHILO} Must be enrolled in {BAHIST} OR Any passed pre-req unit in {ID300, ID400}

The following table describes operators for unit set rules.

Table 8–127 Unit Set Rules Operators

Operator	Definition
Must be enrolled in	N/A
{	N/A
a unit set	User enters valid Unit Set code. If partial code is entered, list of matching codes is displayed. On validation the system will check for confirmed unit set attempts in program attempts with the status of Enrolled, Inactive or Completed.
, or }	User can enter more than one Unit Set code. Multiple codes are separated by commas.

Table 8–127 Unit Set Rules Operators

Operator	Definition
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A
)	N/A
OR	N/A
Example:	<p>Must be enrolled in {BAHIST}</p> <p>Must be enrolled in {BAHIST, BAPOLSCI, BAPHILO}</p> <p>Must be enrolled in {BAHIST} OR Any passed pre-req unit in{ID300, ID400}</p>

The following table describes operators for organizational unit rules.

Table 8–128 Organizational Unit Rules Operators

Operator	Definition
Must have passed <numeric value>..	A student must equal or exceed (in this Student Program Attempt) the given numeric value of credit points or units from the subsequent option selected. The possible options follow.
..credit points	<p>Definition: Student has achieved the nominated number of credit points in the student course attempt.</p> <p>Example. Must have passed 8 credit points</p>
..credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	<p>Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit.</p> <p>Example. Must have passed 8 credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 credit points at levels {2} from units owned by {0016}</p>
..credit points from units owned by {Org Unit Code}	<p>Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit.</p> <p>Example. Must have passed 4 credit points from units owned by {0016}</p>

Table 8–128 Organizational Unit Rules Operators

Operator	Definition
(	N/A
)	N/A
OR	N/A
Must have passed or be enrolled in	N/A
Parse Successful or AND or OR	User can end rule or create additional unit version rules

Syntax for Passed + Enrolled Credit Points Rule (Note: I/W stands for institution wide)

Must have passed...

..(I/W) credit points

..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]

..(I/W) credit points from units owned by {Org Unit Code}

The following table describes enrolled credit points operators.

Table 8–129 Enrolled Credit Points Operators

Operator	Usage
Must have passed <numeric value>..	A student must equal or exceed the given numeric value of credit points or units from the subsequent option selected (includes units completed in other program attempts). The possible options follow.
..(I/W) credit points	<p>Definition: Student has achieved the nominated number of credit points, including all credit points achieved in other program attempts.</p> <p>Example. Must have passed 8 (I/W) credit points</p>

Table 8–129 Enrolled Credit Points Operators

Operator	Usage
..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit. Example. Must have passed 8(I/W) credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 (I/W) credit points at levels {2} from units owned by {0016}
..(I/W) credit points from units owned by {Org Unit Code}	Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit. Example. Must have passed 4 (I/W) credit points from units owned by {0016}
Parse Successful or AND or OR	User can end rule or create additional unit version rules

To satisfy the current requirement that passed and enrolled unit attempts be considered, 4 new rules will be created which validated against the sum of passed credit points and enrolled credit points in teaching periods which start prior to the teaching period in which the student is attempting to enroll. The four new rules will read as follows:

Must have passed **or be enrolled in...**

..(I/W) credit points

..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]

..(I/W) credit points from units owned by {Org Unit Code}

The following table describes enrolled credit points operators.

Table 8–130 Enrolled Credit Points Operators

Operator	Usage
Must have passed or be enrolled in <numeric value>..	A student must equal or exceed the given numeric value of credit points or units from the subsequent option selected (includes units completed in other program attempts). The possible options follow.

Table 8–130 Enrolled Credit Points Operators

Operator	Usage
..(I/W) credit points	<p>Definition: Student has achieved the nominated number of credit points, including all credit points achieved in other program attempts.</p> <p>Example. Must have passed 8 (I/W) credit points</p>
..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	<p>Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit.</p> <p>Example. Must have passed 8(I/W) credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 (I/W) credit points at levels {2} from units owned by {0016}</p>
..(I/W) credit points from units owned by {Org Unit Code}	<p>Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit.</p> <p>Example. Must have passed 4 (I/W) credit points from units owned by {0016}</p>
Parse Successful or AND or OR	User can end rule or create additional unit version rules

The following table describes operators for program stage rules.

Table 8–131 Program Stage Rule Operators

Operator	Usage
Must have completed a stage of	N/A
{	N/A
a valid Program Stage Code	User enters a valid Program Stage code, if partial code is entered, list of matching codes is displayed
, or }	User can enter more than one Person ID Group code. Multiple codes are separated by commas.
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A

Table 8–131 Program Stage Rule Operators

Operator	Usage
)	N/A
OR	N/A
Example:	Must have completed a stage of {YEAR2}

The following table describes operators for person reference types rules.

Table 8–132 Person Reference Types Rule Operators

Operator	Usage
Must be a member of	N/A
{	N/A
a valid Person Reference Type Code	User enters a valid Person Reference Type code, if partial code is entered, list of matching codes is displayed. Only people with active Person Reference Types are validated.
, or }	User can enter more than one Person Reference Type code. Multiple codes are separated by commas.
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A
)	N/A
OR	N/A
Example:	Must be a member of {LEGACY, HONORS} or Must have completed {HONOR101}

The following table describes operators for person ID group rules.

Table 8–133 Person ID Group Rule Operators

Operator	Usage
Must be a member of	N/A
{	N/A
a valid Person ID Group Code	User enters a valid Person ID Group code, if partial code is entered, list of matching codes is displayed. Only people with active Person ID Groups are validated.

Table 8–133 Person ID Group Rule Operators

Operator	Usage
, or }	User can enter more than one Person ID Group code. Multiple codes are separated by commas.
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A
)	N/A
OR	N/A
Example:	Must be a member of {DEANF01, PSCHOLF01} or Must have completed {HONOR101}

The following table describes operators for special permission rules.

Table 8–134 Special Permission Rule Operators

Operator	Usage
Must have special permission	N/A
Parse Successful or AND or OR	User can end rule or create additional unit version rules
(	N/A
)	N/A
OR	N/A
Example:	Must have special permission.

The following table describes set of articulated course operators.

Table 8–135 Set of Articulated Course Operators

Operator	Description
(	N/A
)	N/A
OR	N/A

8.20.2.1 Setting Up Program Stage Rules

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Stages window

Program Structure and Planning > Basic Program Details window

Steps

1. Query the appropriate record.
2. Click Other Program Detail.
3. Click Program Stage.
The Program Stages window appears.
4. Query the appropriate record.
5. Click Program Stage Rules.
The Program Stage Rules window appears.
6. Enter data in each field of the window as described in the table. Save your work.

Table 8–136 Program Stage Rules Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program code
Version Number	Default, display only		Program version number
Program Status	Default, display only		Program status
Title	Default, display only		Program title

Table 8–136 Program Stage Rules Window Description

Field Name	Type	Features	Description
Program Stage	Default, display only		Program stage type
[Description]	Default, display only		Program stage type description
Program Stage Rules Region			
Rule Description	Default, display only		Rule description
Defined Lamp	Default, display only		Defaults to Undefined if rule is not defined in Rule window
Rule Text	Default, display only		Rule details
Back		Button	Returns users to Program Stages window
Edit Rule		Button	Opens Rule window to edit program stage rule

8.20.3 Unit Version Rules

Rules for unit versions are unique to the unit code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The unit version rules determine conditions that must be met prior to enrollment in a unit. Unit version rules are viewed in the Unit Version Rules window.

The following table describes unit corequisite rule syntax and operators.

Table 8–137 Unit Corequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
Any co-req unit in {}	students must be enrolled in unit included in set that follows	Any co-req unit in {MAA101, MAA102}	returns true if student enrolls in either MAA101 or MAA102
Any passed co-req unit in {}	students must be coenrolled in unit included in set that follows, and must have passed it	Any passed co-req unit in {MAA201, MAA202}	returns true if student enrolls in and passes MAA201 or MAA202

Table 8–137 Unit Corequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
{ }	start and end of unit set definition	{MAA101, MAA102}	N/A
,	separator between unit codes	{MAA101, MAA102}	N/A
.	separator between unit code and version number	{MAA101.2, MAA102.3}	N/A
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}	N/A
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}	N/A
AND	logical and	Any co-req unit in {MAA101, MAA102} and Any passed co-req unit in {MAA201, MAA202}	N/A
Any co-req unit set	valid set code	N/A	N/A
Any co-req unit sets of Category	unit set category	N/A	N/A
Any passed co-req unit in	valid unit code	N/A	N/A
Must be in a course owned by	org unit	N/A	N/A
Must be enrolled in a course type	program type	N/A	N/A
Must be enrolled in a course version	N/A	N/A	N/A
(	N/A	N/A	N/A
)	N/A	N/A	N/A
OR	N/A	N/A	N/A

The following table describes unit corequisite rule variables.

Table 8–138 Unit Corequisite Rule Variables

Variable	Description
%	used to select multiple units
Unit codes	unit codes
Number	number from zero to nine
Unit sets	unit set codes

The following table describes unit incompatible rule syntax and operators.

Table 8–139 Unit Incompatible Rule Syntax and Operators

Syntax / Operator	Definition
Incompatible with	valid unit code
Incompatible with achievement in	valid unit code
(	N/A
)	N/A
OR	N/A

The following table describes unit compatible rule variables.

Table 8–140 Unit Incompatible Rule Variable

Variable	Description
%	used to select multiple units
Unit codes	unit codes
Number	number from zero to nine
Unit sets	unit set codes

The following table describes unit prerequisite rule syntax and operators.

Table 8–141 Unit Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Any passed pre-req unit in { }	student must be enrolled in unit included in following set, and must have passed it	Any passed pre-req unit in {MAA101, MAA102}
Any pre-req unit in { }	student must be enrolled in unit included in following set	Any pre-req in {MAA101, MAA102}
{ }	start and end of unit set definition	{MAA101, MAA102}
,	separator between unit codes	{MAA101, MAA102}
.	separator between unit code and version number	{MAA101.2, MAA102.3}
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
AND	logical and	Any passed pre-req unit in {MAA101, MAA102} AND Any pre-req in {MAA101, MAA102}
Must be a member of	reference type	N/A
Must be currently enrolled in	valid unit code	N/A
Must be enrolled in course version	valid program code	N/A
Must be member of	person ID group	N/A
Must have achieved test type	test type	N/A
Must have achieved placement of	unit placement	N/A
Must have achieved test type	test type	N/A
Must have completed a stage of	program stage	N/A
Must have course GPA equal to or greater than	valid number	N/A

Table 8–141 Unit Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Must have course WAM equal to or greater than	valid number	N/A
Must be enrolled in credit points	number	N/A
Must be enrolled in a unit	valid unit code	N/A
Must have passed	valid number of credit points, credit points at level	N/A
Must have passed a unit in	valid unit code	N/A

The following table describes unit prerequisite rule variables.

Table 8–142 Unit Prerequisite Rule Variable

Variable	Description
%	used to select multiple units
Unit codes	unit codes
Number	number from zero to nine
Unit sets	unit set codes

The following table describes unit translation set rule operators.

Table 8–143 Unit Translation Set Rule Operators

Operator	Definition	Example
{ }	start and end of unit set definition	{MAA101, MAA102}
,	separator between unit codes	{MAA101, MAA102}
.	separator between unit code and version number	{MAA101.2, MAA102.3}
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}

Table 8–143 Unit Translation Set Rule Operators

Operator	Definition	Example
Unit was previously coded	valid unit code	N/A

The following table describes unit translation set rule variables.

Table 8–144 Unit Translation Set Rule Variables

Variable	Description
%	used to select multiple units
Unit codes	unit codes
Number	number from zero to nine
Unit sets	unit set codes

8.20.3.1 Setting Up Unit Version Rules IGSPS061

The unit version rules procedure is used to inquire about the unit version rules attached to a particular unit version and accesses the window used to create and edit rules. Rules that pertain to unit versions include the following:

- Unit Co-requisite
- Unit Incompatible
- Unit Prerequisite
- Unit Translation Set

Maintaining Unit Version Rules Procedure

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Version Rules window

Steps

1. Alternatively, navigate to the Unit Version Rules window as follows:

Program Structure and Planning > Basic Unit Details

The Basic Unit Details window appears.

2. Query the appropriate record.
3. Click Other Unit Details.

Other relevant buttons appear.

4. Click Unit Version Rules.

The Unit Version Rules window appears.

The Rule Text field displays the detail of the rule for the program version. If no rule text is entered for a program version, an Undefined label is displayed adjacent to the rule description.

5. To query a new unit version, return to the Basic Unit Details window.
6. To modify a rule, click Edit Rule.

The Rule window appears.

7. Enter data in appropriate fields.
8. Save or save and continue as follows:
File > Save or Save and Proceed

8.20.4 Unit Set Rules

Rules for unit sets are unique to the unit set code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The unit set rules determine conditions that must be satisfied prior to enrollment in a unit set, or whether the completion requirements of the unit set are satisfied. Unit set rules are viewed in the Unit Set Rules window.

The following table describes unit set prerequisite rule syntax and operators.

Table 8–145 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
{ }	start and end of unit set definition	{ACC-MAJ1, ACC-MIN2}	N/A
,	separator between unit set codes	{ACC-MAJ1, ACC-MIN2}	N/A

Table 8–145 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
.	separator between unit set code and version number	{ACC-MAJ1, ACC-MIN2}	N/A
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}	N/A
[]	start and end of unit set version	{MAA101.[1,3-10], MAA102.3}	N/A
Student must have or been granted advanced standing equal to or greater than <numeric value> credit points	before specifying unit set, student must have advance standing equal to or greater than specified number of credit points	Student must have or been granted advanced standing equal to or greater than 8 credit points	returns true if student has 8 or more credit points of advance standing
Student must have completed studies in Unit Set { }	before specifying unit set, student must complete studies in unit set	Student must have completed studies in Unit Set {ACC-MAJ1, ACC-MIN2}	returns true if student completes ACC-MAJ1 or ACC-MIN2 unit sets
(	N/A	N/A	N/A
)	N/A	N/A	N/A
OR	N/A	N/A	N/A

The following table describes unit set prerequisite rule variables.

Table 8–146 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
{ }	start and end of unit set definition	{ACC-MAJ1, ACC-MIN2}	N/A
,	separator between unit set codes	{ACC-MAJ1, ACC-MIN2}	N/A

Table 8–146 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example	Result
.	separator between unit set code and version number	{ACC-MAJ1, ACC-MIN2}	N/A
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}	N/A
[]	start and end of unit set version	{MAA101.[1,3-10], MAA102.3}	N/A
Student must have or been granted advanced standing equal to or greater than <numeric value> credit points	before specifying unit set, student must have advance standing equal to or greater than specified number of credit points	Student must have or been granted advanced standing equal to or greater than 8 credit points	returns true if student has 8 or more credit points of advance standing
Student must have completed studies in Unit Set { }	before specifying unit set, student must complete studies in unit set	Student must have completed studies in Unit Set {ACC-MAJ1, ACC-MIN2}	returns true if student completes ACC-MAJ1 or ACC-MIN2 unit sets
(	N/A	N/A	N/A
)	N/A	N/A	N/A
OR	N/A	N/A	N/A

The following table describes unit set prerequisite rule variables

Table 8–147 Unit Set Prerequisite Rule Variables

Variable	Description
%	used to select multiple units
Unit codes	unit codes
Number	number from zero to nine
Unit sets	unit set codes

The following table describes unit set completion rule syntax.

Table 8–148 Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must pass <numeric value> credit points	N/A	student achieves or exceeds specified number of credit points for program stage	Must pass 8 credit points	returns true if student has 8 or more credit points or advanced standing
N/A	at levels <numeric value> {Unit Levels} with no more than <numeric value> credit points of pass conceded	student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must pass 8 credit points at level 1 Must pass 8 credit points at level 1 with no more than 2 credit points of pass conceded	second example returns true if student has 8 or more credit points at level 1 and maximum of two of 8 credit points achieved through special Pass Conceded grade
N/A	in { } with grade of at least <Grading Schema.Grade >	student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C	second example returns true if student achieves 3 credit points from listed units, with at least a credit result

Table 8–148 Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
N/A	not in { }	student passes, or is granted advanced standing for, specified number of credit points from units other than those in entered braces; valid unit codes are entered in braces	Must pass 4 credit points not in {ADH601, ADH602, ADH603, ADH604}	returns true if student passes 4 units from units not listed
N/A	with no more than <numeric value> with credit points in {Unit Codes} with no more than <numeric value> credit points of pass conceded	student achieves or exceeds entered number of credit points for student program attempt; qualified by specified units or specified pass conceded limit	Must pass 8 credit points with no more than 2 credit points of pass conceded	returns true if student has 8 or more credit points, and maximum of 2 of 8 credit points achieved through special Pass Conceded grade
Must pass <numeric value> units in { } with grade of at least <Grading Schema Code.Grade>	N/A	student passes, or is granted advanced standing for, specified number of units, but with no more than the specified number of units coming from those in unit code list; valid unit codes are entered in braces	Must pass 5 units with no more than 2 units in {ADH601, ADH602, ADH603, ADH604}	returns true if student passes 5 units with no more than 2 from listed units, with at least a credit result

Table 8–148 Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must pass all units in { }	N/A	student passes, or is granted advanced standing for, all units inside braces	Must pass all units in {ADH601, ADH602, ADH501}	returns true if student passes all listed units
Must pass credit points for program with no more than <numeric value> credit points at levels { }	N/A	student must equal or exceed program version credit points required value, with no more than specified number of credit points from specified level, for a student program attempt	Must pass credit points for program with no more than 2 credit points at level {1}	returns true if student has no more than 2 credit points at level {1}
Must complete all units in { }	N/A	student completes, or is granted advanced standing for, all units in list of units; qualified with valid unit code or set of codes inside braces	Must complete all units in {ADH601, ADH602, ADH501}	returns true if student completes all listed units
Must complete special requirement of type <Special Requirement Code>	N/A	student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requirement of type First Aid	returns true if student has current First Aid certificate
Must complete stage of type <Program Stage Code>	N/A	student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03	N/A

Table 8–148 Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must have completed <numeric value>	N/A	student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	N/A	N/A
N/A	primary unit sets of category <Unit Set Category>	tests if specified number of primary unit sets from selected category are completed	Must have completed 1 primary unit sets of category Major	N/A
N/A	unit sets in { }	tests if specified number of unit sets are completed; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}	N/A
N/A	unit sets of category <Unit Set Category>	tests if specified number of unit sets from selected category are completed; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor	N/A

The following table describes unit set completion rule operators.

Table 8–149 Unit Set Completion Rule Operators

Operator	Definition	Example
()	parentheses, to force execution order	(1+3)/4 is not the same as 1+3/4
{ }	start and end of unit or unit set definition	{ACC-MAJ1, ACC-MIN2}
,	separator between unit or unit set codes	{ACC-MAJ1, ACC-MIN2}
.	separator between unit or unit set code and version number	{ACC-MAJ1.2, ACC-MIN2.3}
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
%	used to select multiple units or other codes	{A%} for all units that start with A
AND	logical and	(Must complete 3 credit points AND Must complete special requirement of type First Aid) OR Must complete 5 credit points
OR	logical or	(Must complete 3 credit points AND must complete special requirement of type First Aid) OR Must complete 5 credit points

The following table describes unit set completion rule variables.

Table 8–150 Unit Set Completion Rule Variables

Variable	Definition	Example
numeric value	number	Must complete 24 credit points
Unit Code	currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	currently defined grading schema code	with grade of at least Standard.C
Grade	currently defined grade within grading schema	with grade of at least Standard.C

Table 8–150 Unit Set Completion Rule Variables

Variable	Definition	Example
Special Requirement Code	currently defined special requirement code	Must complete special requirement of type First Aid
Program Stage Code	currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	currently defined unit set category	Must have completed 1 primary unit sets of category Major

See Setting Up Unit Set Rules IGSPS068 for information about setting up unit set rules.

8.20.5 Unit Section Version Rules

Users can inquire on the unit version rules attached to a particular unit version. Users can also modify the rule, if it is Required for a specific unit section. The unit section version rules procedure includes the following rules:

- Unit Co-requisite rule
- Unit Pre-requisite rule

The unit section version rules procedure enables users to query unit section version rules and access the Unit Section Version Rules window that is used to create and edit rules.

8.20.5.1 Setting Up Unit Section Version Rules

Users can inquire on the unit version rules attached to a particular unit version. Users can also modify the rule, if it is Required for a specific unit section. The unit section version rules procedure includes the following rules:

- Unit Co-requisite rule
- Unit Pre-requisite rule

The unit section version rules procedure enables users to query unit section version rules and access the Unit Section Version Rules window that is used to create and edit rules.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in the appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Unit Section Version Rules.
The Unit Section Version Rules window appears.
4. Enter data in each field of the Unit Section Version Rules window as described in the table.
5. Save your work.

Table 8–151 Unit Section Version Rules Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Unit section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number, or day and time indicator, depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			

Table 8–151 Unit Section Version Rules Window Description

Field Name	Type	Features	Description
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code
Effective Dates	Default, display only		Teaching period start and end dates
Unit Section Status	Default, display only		Institution-defined unit section status
Unit Section Effective Dates	Default, display only		Unit section start and end dates, if different from the teaching period start date
Unit Section Rules Region			
Rule Description	Default, display only		Rule description Note: Rules are displayed at unit section level only if they are defined at the unit level.
Defined	Default, display only		Indicates whether a rule has been defined or not; values are Defined, Undefined
Rule Text	Default, display only		Comments Note: The Rule Text field displays the program version rule detail.
Edit Rule		Button	Opens the Edit Rule window

The following information is described in this chapter:

- Oracle Student System Inquiries
- Setting Profile Options
- Setting Up Descriptive Flexfields
- Setting Up Inquiry Process Details

9.1 Oracle Student System Inquiries

Institutions of Higher Education communicate with prospective students to make the best possible fit between the interests and aptitudes of prospective students and the offerings and opportunities provided by the institution. That effort can range from simply responding to prospect queries through Oracle Student System inquiries to the implementation of a full recruiting program using Oracle's CRM solution.

Inquiry records are created when prospects use the online self-service OSS Inquiry pages or information is recorded in forms by back office staff. Recruiters can manage this information in a consistent manner, from a single log, whether it originates from OSS inquiries or from CRM.

OSS Inquiry instances and Package Item processing records are included in the CRM Interaction History log along with the records of other activities initiated from CRM modules. This allows the Recruiter to easily access a comprehensive record of all the interactions involving a prospect.

9.2 Setting Profile Options

See Chapter 3, "Other Oracle Applications and Tools" for information about setting profile options.

Profile Options for JTF

You must set the JTF profile options at both the site and application levels. For ease of use, you can set the same value at the site and the application levels. These seeded values enable you to save information in CRM tables.

- IGS: JTF Outcome
- IGS: JTF Reason
- IGS: JTF Resource
- IGS: JTF Result

See Appendix A, "Oracle Student System Profile Options" for detailed information about these profile options.

Profile Options for Oracle Marketing Online

You must set the following profile options at both the site and application levels.

- IGS: AMS CATEGORY TYPE
- IGS: AMS CATEOGRY SUB TYPE

Note: You must set the IGS: AMS CATEGORY TYPE profile option and close the window before setting the IGS: AMS CATEGORY SUB TYPE profile option.

See Appendix A, "Oracle Student System Profile Options" for detailed information about these profile options.

9.3 Setting Up Descriptive Flexfields

You must compile the following descriptive flexfield segments:

- Prospective Account Inquiry
- Inquiry Instance

See *Oracle Applications Flexfields Guide* for information about setting up descriptive flexfields.

The Prospective Account Inquiry and Inquiry Instance flexfields are required. See Chapter 3, "Other Oracle Applications and Tools" for information about optional descriptive flexfields in Oracle Student System.

9.4 Setting Up Inquiry Process Details

9.4.1 Setting Up Inquiry Package Items

The inquiry package items procedure enables users to indicate printed items that can be sent to a person making an inquiry. Inquiries for an organization unit, discipline, or program can be specific or general for the institution.

The Inquiry Package Items window generates a list of inquiry package items according to the details entered for an applicant in the Record Inquiries window. Package items are displayed by clicking Package Item in the Record Inquiries window. Some examples of inquiry package items are Handbook and Residence.

Inquiry Package Items are collateral items sent to prospective applicants, such as View books and Brochures. OMO provides a comprehensive solution to manage the lifecycle of collateral items from definition to fulfillment and distribution.

OMO supports two types of Deliverables: physical deliverables, such as a flyer or printed information, and electronic deliverables, such as an electronic brochure or email attachment.

The fulfillment of electronic deliverables is handled by Fulfillment Server Product in OMO.

For fulfillment of physical deliverables, you can either install Oracle Inventory (INV) and Order Management (OE) products to have a fully integrated and automated fulfillment solution, or choose to manually track the deliverables.

Note: Once used in Student System, inquiry package items cannot be deleted. A warning is displayed if user try to close an inquiry package item that is used in other packages. Inquiry package items are retrieved by querying the system.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Package Items window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–1 Inquiry Package Items Window Description

Field Name	Type	Features	Description
Inquiry Package Item	Required		Institution-defined inquiry package item; default is effective from date of entry
Description	Required		Inquiry package item description
Effective From	Required		Beginning date inquiry package item is effective
Effective To	Required		End date inquiry package item is effective
Publish in Self Service	Optional	Check box	If selected, publishes inquiry package item in the Self Service window

9.4.2 Setting Up Inquiry Information Type and Inquiry Type Package Items

Use these windows to establish a list of Information Types and their associated Package Items for back office functions.

9.4.2.1 Setting Up Inquiry Information Type

These codes describe a grouping of information that can be sent to a person making an inquiry. Codes include program, fees, and accommodation. Each Information Type can have one or many inquiry package items.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Information Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–2 Inquiry Information Types Window Description

Field Name	Type	Features	Description
Inquiry Information Type	Required		Inquiry information type
Description	Required		Inquiry information type description
From	Required		Effective date of inquiry information type
To	Required		Effective date of inquiry information type
Package Items		button	Opens Inquiry Information Type Package Items window

9.4.2.2 Setting Up Inquiry Information Type Package Items**Prerequisites**

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Information Types > Package Items button > Inquiry Information Type Package Items window

Steps

1. Query the appropriate record.
2. Click Package Items.

The Inquiry Information Type Package Items window appears.

3. Enter data in each field of the window as described in the table. Save your work.

Table 9–3 Inquiry Information Type Package Items Window Description

Field Name	Type	Features	Description
Inquiry Package Item	Required	List of values	Inquiry package item code
Description	Display only		Inquiry package item code description
Back		Button	Returns to the Inquiry Information Types window

9.4.3 Setting Up Inquiry Entry Statuses

The Inquiry Entry Statuses window enables users to set up entry information for a person. An example of an inquiry entry status would be Returning Sophomore. Entry statuses can be linked to organizational units and inquiry programs.

The administrative user can set the hierarchy in the following ways:

- all three levels: entry status, inquiry program, inquiry unit set
- two levels: entry status, inquiry program. No unit sets are defined.
- all three levels: entry status, inquiry program, inquiry unit set, but only defines one single inquiry program, for example, all

OSS entry status is synchronized with Oracle Sales Online’s (OSO) interest type, where the data is stored in OSO Interest Types table. However, OSO interest type does not support all Oracle Student System specific attributes such those recorded in the as Import Source Type, Package Item Reduction, and Institution Type fields. Customers just need to use this window to complete the set up for Entry Status, and the defined entry status will appear in OSO as Interest type with all the mandatory fields populated. However interest types defined in OSO do not appear in OSS Entry Status window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–4 Inquiry Entry Statuses Window Description

Field Name	Type	Features	Description
Inquiry Entry Status	Required		Inquiry entry status
Description	Required		Inquiry entry status description
Enabled	Optional	Check box	If selected, inquiry entry status is enabled for use
Organizational Units		Button	Opens the Inquiry Entry Organizational Units window
Inquiry Programs		Button	Opens the Inquiry Entry Status Programs window

Guidelines

Inquiry Program and Inquiry Unit Set cannot be setup independently and reused. Inquiry Program can only be defined within one Entry Status. Inquiry Unit Set can only be defined within one Inquiry Program.

Inquiry Unit Sets will no longer be able to link to Entry Status directly.

9.4.3.1 Setting Up Inquiry Entry Status Organizational Units

Use this window to define organizational units for a given inquiry entry status.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses >
Organizational Units button > Inquiry Entry Status Organizational Units window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–5 Inquiry Entry Status Organizational Units Window Description

Field Name	Type	Features	Description
Inquiry Entry Status	Default, display only		Inquiry entry status
Organizational Units Region			
Organizational Unit	Required	List of values	Organizational units
Description	Display only		Organizational unit description
Closed	Optional	Check box	If selected, prevents further use of inquiry entry status organization unit record
Back		Button	Returns to the Inquiry Entry Statuses window

9.4.3.2 Configuring Self-Service Inquiry

The self service inquiry configuration tab enables you to configure self-service web inquiry for entry status.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses >Self Service Configuration tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–6 Self Service Inquiry Configuration Window Description

Field Name	Type	Features	Description
Inquiry Entry Status	Display only		Inquiry entry status code and description
Import Source Type	Required	List of values	Import source type
Institution Type	Optional	List of values	Institution types
Package Item Reduction	Required	List of values	Package item reduction Valid values include No Reduction or Entry Status Level Reduction.
Email Link	Optional		Email link
Configuration Function Name	Optional	List of values	Configurability function name
Test Types		Button	Takes you to the Test Types window

9.4.3.3 Inquiry Entry Status Self Reported Test Types

The Inquiry Entry Status Self Reported Test Types window enables users to set up self-reported test types corresponding to an inquiry entry status. The test types selected will appear in the test type list of values for a specific self service inquiry configuration.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Test Types button > Inquiry Entry Status Self Reported Test Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–7 Inquiry Entry Status Self Reported Test Types Window Description

Field Name	Type	Features	Description
Inquiry Entry Status	Display only		Inquiry entry status and description
Self Reported Test Types Region			
Self Reported Test Types	Required	List of values	Self reported test types
Description	Display only		Self reported test type description
Closed	Optional	Check box	If selected, prevents further use of the self reported test types
Back		Button	Returns back to the Self Service Inquiry Configuration window

9.4.3.4 Setting Up Inquiry Programs

Use this window to establish a list of inquiry programs for an entry status.

Inquiry programs must be unique within an inquiry entry status. However, for different entry statuses, inquiry programs can have the same name. Inquiry programs sharing the same name are different inquiry programs. For example, if two inquiry programs with the same name are each connected to two different inquiry entry statuses, each inquiry program will have its own primary interest code.

The defined Inquiry Program will appear in OSO as Primary Interest Code. Primary interest codes defined in OSO will appear in OSS as Inquiry Program.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Inquiry Entry Program button > Inquiry Entry Program window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–8 Inquiry Entry Program Window Description

Field Name	Type	Features	Description
Inquiry Entry Status	Display		Inquiry entry status
Description	Display		Description of inquiry entry status
Inquiry Programs Region			
Inquiry Program	Required		Inquiry program Note: Users must ensure if any transaction records are present for an inquiry program code, before deleting. If present an error message is displayed informing the user that delete option is disabled
Description	Required		Inquiry program code description
Enabled	Optional	Check box	If selected, enables inquiry program for use
Inquiry Unit Sets		Button	Opens Inquiry Program Unit Set Details window

9.4.3.5 Setting Up Inquiry Unit Sets

Use this window to establish a list of inquiry units for an inquiry program.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Inquiry Programs window > Inquiry Unit Sets button > Inquiry Unit Sets window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–9 Inquiry Unit Sets Window Description

Field Name	Type	Features	Description
Inquiry Program	Display		Inquiry program
Description	Display		Description of inquiry program
Inquiry Unit Sets Region			
Inquiry Unit Set Code	Required		Inquiry unit set code
Description	Required		Inquiry unit set code description
Enabled	Optional	Check box	If selected, enables inquiry unit sets for use
Back		Button	Opens Inquiry Programs

9.4.4 Setting Up Inquiry Entry Levels

The Inquiry Entry Levels window enables users to set up inquiry entry level codes. It enables users to enter, query, update, and delete inquiry entry levels. While deleting, users must ensure that transaction records must be associated with a particular inquiry level code. If a transaction record is present, an error message is displayed informing the user that the delete option is disabled.

Inquiry entry levels differ from entry statuses. The entry levels are chronological; for example First Year and statuses are descriptive; for example Returning Sophomore.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Levels window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–10 Inquiry Entry Levels Window Description

Field Name	Type	Features	Description
Inquiry Entry Level	Required		Inquiry entry level
Description	Required		Inquiry entry level description
Closed	Optional	Check box	If selected, prevents further use of the inquiry entry level record

9.4.5 Setting Up Inquiry Package Item Reduction

Use this window to set up reduction associations between package item and entry status, inquiry program, and inquiry unit set. This association is used to reduce the package items list displayed when selecting package items for both self-service and back office.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Package Item Reduction window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–11 Inquiry Package Item Reduction Window Description

Field Name	Type	Features	Description
Entry Status Tab			
Entry Status	Required	List of values	Entry status
Inquiry Package Item	Required	List of values	Package item Valid values include all available package items defined in Oracle Student System
Enabled	Optional	Check box	If selected, enabled entry status package item for use

Table 9–11 Inquiry Package Item Reduction Window Description

Field Name	Type	Features	Description
Program Tab			
Entry Status	Required	List of values	Entry status
Program	Required	List of values	Oracle Student System program
Inquiry Package Item	Required	List of values	Package item Valid values include all available package items defined in Oracle Student System
Enabled	Optional	Check box	If selected, enabled entry status package item for use
Unit Set Tab			
Entry Status	Required	List of values	Entry status
Program	Required	List of values	Oracle Student System program
Unit Set	Required	List of values	Oracle Student System unit set
Inquiry Package Item	Required	List of values	Package item Valid values include all available package items defined in Oracle Student System
Enabled	Optional	Check box	If selected, enabled entry status package item for use

9.4.6 Setting Up Inquiry Detail Codes

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Detail Codes

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–12 Inquirer Information Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Valid values include How did you learn about us and Who influenced you to inquire
Code Name	Required		Name of code
Description	Required		Description of classes
System Method			Disabled; enabled only in the Application Fee Information window
System Default			Disabled; enabled only in the Application Fee Information window
Closed	Optional	Check box	If selected, prevents further use of the record

9.4.7 Setting Up Inquiry Characteristic Types

These codes describe the attributes of an applicant. Examples of these user-defined codes include Mature-Age and Postgraduate. To display inquiry characteristic types, users click **Characteristic** in the Record Inquiries window.

The inquiry characteristic types procedure maintains institution-defined codes for inquiry characteristic types.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Characteristic Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–13 Inquiry Characteristic Types Window Description

Field Name	Type	Features	Description
Inquiry Characteristic Type	Required	List of values	Inquiry characteristic type
Description	Display only		Inquiry characteristic type description
Closed	Optional	Check box	If selected, prevents further use of the inquiry characteristic type

9.4.8 Setting Up Inquiry Methods

The OMO Lead Module has a field named Response Channel. This field is used to capture how users created a lead, and has essentially the same meaning as inquiry method. The Response Channel field is defined via the extensible Lookup Type Vehicle Response Code and set up in the Sales Lookup Codes window using the Oracle Sales Setup responsibility.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Methods window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–14 Inquiry Methods Window Description

Field Name	Type	Features	Description
Inquiry Method	Required		Method of inquiry
Description	Required		Description of inquiry source code
Closed	Optional	Check box	If selected, prevents further use of the record

9.4.9 Setting Up Inquiry Statuses

Use this window to establish a list of institution defined Inquiry Statuses, which are mapped to the three system-defined Inquiry Statuses: Registered (inquiry is received), Acknowledge (inquiry receipt is acknowledged) and Complete (package completed and sent).

The inquiry status indicates inquiry status and the status of package item requests.

Oracle Student System specific lead statuses do not show up for existing Oracle Sales Online customers.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 9–15 Inquiry Status Window Description

Field Name	Type	Features	Description
System Inquiry Status	Required	List of values	System-defined inquiry status code
Inquiry Status	Required		Institution-defined inquiry status code
Description	Required		Inquiry status code description

10.1 Admissions Overview

The Admissions subsystem enables users to manage all aspects of the Admissions processes of an institution. Users can enter and receive inquiries and applications, process applications and make admission decisions, and administer admission fees.

10.2 Application and Government Codes

Admissions Government Setup enables users set up data for statistics to be used for reporting to governments or other agencies.

10.2.1 Setting Up Government Basis for Admission Types IGSST009

In this window users set up government-defined reasons for admission to which user-defined reasons for admission can be mapped. Each institution-defined basis for admission type code entered in the Basis for Admission Types window must be mapped to a government basis for admission type code.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Applications > Government Basis For Admission Type window

Steps

1. Enter the government-defined codes and descriptions of the reasons for admission.
2. Save your work.

Note: Select Closed to prevent further use of a government basis for admission type.

3. Click **Basis For Admission** to enter institution-defined reasons for admission and map these to the list of government-defined values for admission type created.
4. Save your work and return to the Government Basis for Admission Type window.

10.2.2 Setting Up Basis for Admission Types IGSAD002

The basis for admission type procedure enables users to define the grounds for an admission or entry category.

Note: Users can map more than one user-defined basis for admission type to a government-defined basis for admission type.

Note: Users can access bases for admission types created from the Indices tab in the Ratings window when entering application details in the Applications window.

Prerequisites

Government Basis for Admission Types IGSST009

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Basis for Admission Types > Basis for Admission Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–1 Basis for Admission Types Window Description

Field Name	Type	Features	Description
Basis for Admission Type	Required		Code of institution-defined basis used to group admissions Warning: Bases for admission once used in a student's international details record cannot be deleted.
Description	Required		Description of institution-defined basis used to group admissions
Government Basis for Admission Type	Optional	List of values	Government-defined bases used to group admissions
Closed	Optional	Check box	If selected, prevents further use of record

10.2.3 Setting Up Government Admission Codes IGSAD004

In this window users enter government-defined admission codes to which user-defined admission codes can be mapped through the Admission Codes button.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Government Admission Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–2 Government Admission Codes Window Description

Field Name	Type	Features	Description
Government Admission Code	Required		Government-defined admission code
Description	Required		Description of government admission code
Closed	Optional	Check box	If selected, prevents further use of the government admission code
Admission Codes		Button	Opens the Admission Codes window for users to create institution-defined admission code and map it to government-defined admission code

10.2.4 Setting Up Admission Codes IGSAD003

The Admission Codes window enables users to create user-defined admission codes for the various types of admissions that can occur and map these to government-defined codes and to user-defined reasons for admission. Examples of admission codes are conditional, standard, transfer, and returning.

Prerequisites

Basis for Admission Types IGSAD002

Government Admission Codes IGSAD004

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Codes > Admission Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–3 Admission Codes Window Description

Field Name	Type	Features	Description
Admission Code	Required		Institution-defined admission code
Description	Required		Description of admission code
Academic History Admission Center Admission Code	Required	List of values	Academic history admission center code such as transfer, readmit, normal, conditional admittance, honors student, test scores Note: More than one institution admission code can map to an Academic History Admission Center admission code.
Basis for Admission Type	Optional	List of values	Links admission code to a basis for admission type code; examples of admission types can be transfer, returning, readmit, special, degree Note: More than one institution admission code can be linked to a basis for admission type code.
Closed	Optional	Check box	If selected, prevents further use of the admission code

10.3 Admission Intake Targets

The following data for statistics to be used for reporting to governments or other agencies can be set up:

- student target types
- submission intake targets
- organizational unit student targets
- program student targets
- government snapshots

10.3.1 Setting Up Student Target Types IGSAD039

Student target type codes describe applicant characteristics, for example, sight-impaired, commencing, returning, and total.

The data entered for student target types is used in the in the Submission Intake Targets, Organizational Unit Student Targets, and Program Student Targets windows.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Student Target Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–4 Student Target Types Window Description

Field Name	Type	Features	Description
Intake Target Types	Required		Code of user-defined student target type to be offered admission
Description	Required		Description of user-defined student target type to be offered admission
System Intake Target Type	Required	List of values	System-defined student target type to be offered admission such as returning, new, handicapped
Amount Type	Optional	List of values	Amount type for a user-defined student target type, used to calculate student fees; for example, Effective Full Time Student Units (EFTSU), Person, Percentage, and Weighted Effective Full Time Student Units (WEFTSU)
Comments	Optional		Additional comments on user-defined intake target type
Closed	Optional	Check box	If selected, prevents further use of user-defined intake target type

10.3.2 Setting Up Submission Intake Targets IGSAD040

Typically, institutions aim to enroll students with certain characteristics, such as hearing impaired, commencing, or returning students. Submission student targets are entered to establish the minimum requirements the institution aims to achieve. This procedure enters and maintains planning targets for the number of enrolled students who meet the defined characteristics, so that the information can be reported on the census date.

The submission student targets procedure enters submission targets for an offering period.

Prerequisites

Student Target Types IGSAD039

Government Snapshot Control IGSST018

Responsibility

Oracle Student System User Guide

Navigation

Admission > Admission Setup > Setup Intake Targets > Submission Intake Targets > Submission Intake Target window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–5 Submission Intake Targets Window Description

Field Name	Type	Features	Description
Submission Year	Display only		Year of submission for which student intake targets set
Submission Number	Display only		The submission number is user defined and is set up at the same time as the submission year
Submission Intake Targets Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the submission intake targets region is automatically refreshed and coordinated with data in the header region
Intake Target Type	Required	List of values	Code of user-defined student target type to be offered admission in queried submission year
Target	Required		Number of students of selected target type targeted for admission in queried submission year

Table 10–5 Submission Intake Targets Window Description

Field Name	Type	Features	Description
Maximum	Optional		Maximum number of students of selected target type that can be given admission in queried submission year Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	Optional	List of values	Users can change default amount type for given intake target type for the queried submission year
Description	Display only		User-defined student intake target type description

10.3.3 Setting Up Organizational Unit Student Targets IGSAD041

The organizational unit student targets procedure maintains an offering period's organizational unit planning targets, for students enrolled at a census date within organizational units, and the funding source associated with the targets.

Within organizational unit and funding source combinations, targets can be further defined for program type, unit internal program level, and attendance mode.

If an institution does not require the maintenance of targets for an organizational unit, they do not need to be entered.

Prerequisites

Student Target Types IGSAD039

Organizational Units IGSOR030

Funding Sources IGSPS010

Government Snapshot Control IGSST018

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets
> Organizations Unit Student Targets window

Steps

1. Query to retrieve the submission period.
2. Query to retrieve the organizational unit and funding source.
3. Enter data in each field of the window as described in the window.
4. Save your work.

Table 10–6 Organizational Unit Student Targets Window Description

Field Name	Type	Features	Description
Submission Year	Display only		Submission year for which student intake targets set by organizational units
Submission Number	Display only		The submission number is defined by the user at the time they define the submission year.
Organizational Unit Funding Source Region			
Organizational Unit Code	Display only		Code and description of organizational unit
Start Date	Display only		Organizational unit start date
Funding Source	Display only		Code and description of funding source
Program Type Group(...)		Button	Opens Organizational Unit Funding Source Program Type Group window for users to enter intake target values for an organizational unit by target and program type
Attendance Mode(...)		Button	Opens Organizational Unit Funding Source Attendance Mode window for users to define student intake targets for an organization by mode of attendance
Unit Internal Program Level(...)		Button	Opens Organizational Unit Funding Source Unit Internal Program Level window for users to define student intake targets for an organization by program level
Organizational Unit Funding Source Target Region			

Table 10–6 Organizational Unit Student Targets Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the organizational unit funding source target region is automatically refreshed and coordinated with data in the organizational unit funding source region
Intake Target Type	Required	List of values	Code of user-defined student target type to be offered admission in queried submission year
Target	Required		Number of students of selected target type targeted for admission in queried submission year
Maximum	Optional		Maximum number of students of selected target type that can be given admission in queried submission year Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	Optional	List of values	Users can change default amount type for given intake target type for the queried submission year

10.3.3.1 Setting Up Organizational Unit Funding Source Program Type Group

In this window users define student intake target for admission per program type for an organizational unit and funding source.

In some educational systems, institutions are by law required to enroll a pre-defined number of student categories every year. This section deals with statistics on these admissions. For example, each year, intake targets are reported to government agencies for the submission period.

Student intake targets are enrollment targets used to enroll students with particular characteristics required by an institution. Institutions enter them and extract them for use in third party software.

If an institution does not require targets to be maintained for an organizational unit or program, the targets do not have to be entered.

The process for entering student intake targets includes the following steps:

1. Check that reference data is entered in the Student Target Types window.
2. Enter submission period targets in the Submission Intake Targets window.
3. If required, define intake targets in the Admission Period Date Overrides window. Break down intake targets for organizational unit and funding sources. Within these categories, targets can be defined for program type group, unit internal program level, and attendance mode.
4. Further define intake targets in the Program Student Targets window for each program and unit set, as required.

Prerequisites

Student Target Types IGSAD039

Program Type Groups IGSPS002

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets window

Steps

Enter data in each field of the window as described in the table. Save your work.

1. Query to retrieve the submission period.
2. Query to retrieve the organizational unit and funding source.
3. Click the Program Type Group button.
The Organizational Unit Funding Source Program Type Group window appears.
4. Enter data in each field of the window as described in the table. Save your work.

Table 10–7 Organizational Unit Funding Source Program Type Group Window Description

Field Name	Type	Features	Description
Program Type Group	Display only		Code and description of program type for which organizational unit's student intake targets to be set
Organizational Unit Funding Source Program Type Group Target Region			
Intake Target Type	Required	List of values	Code of user-defined student target type to be offered admission in queried submission year
Target	Required		Number of students of selected target type targeted for admission in queried submission year
Maximum	optional		Maximum number of students of selected target type that can be given admission in queried submission year Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	optional	List of values	Users can change default amount type for given intake target type for the queried submission year
Back		BButton	Returns users to Organizational Unit Student Targets window

10.3.3.2 Setting Up Organizational Unit Funding Source Attendance Mode

The Organizational Unit Funding Source Attendance Mode window enables users to define target and maximum values for student intake by mode of attendance, the organizational unit and funding source being constant.

Prerequisites

Student Target Types IGSAD039

Program Attendance Modes IGSPS005

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets window

Steps

1. Query to retrieve the submission period.
2. Query to retrieve the organizational unit and funding source.
3. Click Attendance Mode.

The Organizational Unit Funding Source Attendance Mode window appears.

4. Enter data in each field of the window as described in the table. Save your work.

Table 10–8 Organizational Unit Funding Source Attendance Mode Window Description

Field Name	Type	Features	Description
Attendance Mode	Display only		Code and description of attendance mode in queried submission year for which organization's student intake targets to be set
Organizational Unit Funding Source Attendance Mode Target Region			
Intake Target Type	Required	List of values	Code of user-defined student target type to be offered admission in queried submission year
Target	Required		Number of students of selected target type targeted for admission in queried submission year

Table 10–8 Organizational Unit Funding Source Attendance Mode Window Description

Field Name	Type	Features	Description
Maximum	optional		Maximum number of students of selected target type that can be given admission in queried submission year Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	optional	List of values	Users can change default amount type for given intake target type for the queried submission year
Back		BButton	Returns users to Organizational Unit Student Targets window

10.3.3.3 Setting Up Organizational Unit Funding Source Unit Internal Program Level

This procedure enables users to define student intake targets at the program level for an organization and funding source.

Prerequisites

Student Target Types IGSAD039

Unit Internal Program Levels IGSPS046

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets window

Steps

1. Query to retrieve the submission period.
2. Query to retrieve the organizational unit and funding source.

3. Click Unit Internal Program Level.

The Organizational Unit Funding Source Unit Internal Program Level window appears.

4. Enter data in each field of the window as described in the table. Save your work.

Table 10–9 Organizational Unit Funding Source Unit Internal Program Level Window Description

Field Name	Type	Features	Description
Unit Internal Program Level	Display only		Code and description of program level in organizational unit for which student intake targets to be set
Organizational Unit Funding Source Unit Internal Program Level Target Region			
Intake Target Type	Required	List of values	Code of user-defined student target type to be offered admission in queried submission year and program level
Target	Required		Number of students of selected target type targeted for admission in queried submission year, and program level
Maximum	optional		Maximum number of students of selected target type that can be given admission in queried submission year Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	optional	List of values	Users can change default amount type for given intake target type for the queried submission year
Back		BButton	Returns users to Organizational Unit Student Targets window

10.3.4 Setting Up Program Student Targets IGSAD042

The program student targets procedure enters planning targets for students enrolled at census date within programs, for all program offering options and unit set combinations, for a specific submission period.

Within program and funding source combinations, targets can be established for particular program offering patterns. They can be further defined to the unit set level within the program offering pattern.

The Program Student Targets window is similar in operation to the Organizational Unit Student Targets window.

If an institution does not require the maintenance of targets for a program, they do not need to be entered.

Prerequisites

Attendance Type IGSPS006

Funding Sources IGSPS010

Basic Program Details IGSPS013

Basic Unit Set Details IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Intake Targets > Program Student Targets window

Steps

1. Query the appropriate submission period, program and funding source.

2. Enter data in each field of the window as described in the table. Save your work.

Table 10–10 Program Student Targets Window Description

Field Name	Type	Features	Description
Submission Period Region			
Submission Year	Display only		Submission year for which student intake targets to be set
Submission Number	Display only		Submission number is user defined and is set up at the same time as Submission Year
Program Version Region			
Program Code	Display only		Code of program for which student intake targets to be set in queried submission year
Version Number	Display only		Program version number for queried submission year
Title	Display only		Program title
Funding Source Region			
Funding Source	Display only		Code of funding source for given program for which student targets mapped to given program code for the queried submission year
Description	Display only		Description of funding source
Submission Program Funding Source Target Definitions Region			
Location Code	Optional	List of values	Available location for given program
Attendance Mode	Optional	List of values	Available attendance mode code for given program; if classroom, distance education
Attendance Type	Optional	List of values	Available attendance type code for program; full time, part time
Unit Set Code	Optional	List of values	Available unit set for program in queried submission year
Unit Set Version Number	Display only		Version number of selected unit set in queried submission year

Table 10–10 Program Student Targets Window Description

Field Name	Type	Features	Description
Submission Program Funding Source Intake Targets Region			
Intake Target Type	Required	List if Values	Code of user-defined student target type to be offered admission in queried submission year, program, funding source, and offering option
Target	Required		Number of students of selected target type targeted for admission in queried submission year, program, funding source, and offering option
Maximum	Optional		Maximum number of students of selected target type that can be given admission in queried submission year, program, funding source, and offering option Note: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.
Amount Type	Display only		Displays amount type set up as default for intake target type in Student Target Types window; amount type used in Student Finance subsystem for student fee calculation
Override Amount Type	Optional	List of values	Users can change default amount type for given intake target type for queried submission year, program, funding source, and offering option

10.4 Secondary and Tertiary Education Details

Admissions Secondary and Tertiary Education Details enables users to map non-US institutions, terms, and concepts to government institutions, terms, and concepts of the United Kingdom.

10.4.1 Setting Up Secondary Education Schools Codes IGSAD014

Users can map each secondary education school codes to a system-defined school type. These codes are government secondary school codes as listed in the relevant government manual or handbook. The codes indicate the school at which the final year of secondary education occurred.

The secondary education schools procedure enables users to create government-defined secondary education school codes.

Note: Once secondary education school codes are used in Student System, the codes cannot be deleted. Only minor modifications can be made to the codes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Secondary Education Schools > Secondary Education Schools window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–11 Secondary Education Schools Window Description

Field Name	Type	Features	Description
School Code	Required		Institution-defined secondary school code
Secondary School Name	Required		Secondary school name
State	Required	drop-down list	Codes of Australian states: ACT, NSW, NT, QLD, SA, TAS, VIC, WA
School Type	Optional	List of values	Secondary school type per management if private or independent, state or other than these categories
Closed	Optional	Check box	If selected, prevents further use of the school code

10.4.2 Setting Up Government Levels of Qualification IGSAD019

The Government Levels of Qualification window is used to create and maintain the government codes that define the level of qualification an applicant has obtained.

Institution-defined level of qualification codes are mapped to these codes in the Government Levels of Qualification window. If a government offer file is loaded into Oracle Student System, the system enters the level of qualification of the applicant's prior tertiary education. It is the institution value, derived from the government-supplied code, that is entered for the student.

The Government Levels of Qualification Codes navigation button invokes the Government Levels of Qualification window. Selecting a government code before navigating to the Government Levels of Qualification window causes only the institution-defined codes mapped to this government code to be displayed in the Government Levels of Qualification window.

Prerequisites

Tertiary Level of Qualification IGSAD015

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Qualification window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–12 Government Levels of Qualification Window Description

Field Name	Type	Features	Description
Government Level of Qualification	Required		Code of Government level of qualification
Description	Required		Government level of qualification description
Closed	Optional	Check box	If selected, prevents further use of record
Academic History Education Level of Qualification Codes		Button	Opens Tertiary Education Level of Qualification window for users to enter user-defined values for tertiary education qualification and map these to Tertiary Admission Center (TAC) levels of qualification

10.4.3 Setting Up Tertiary Education Level of Qualification IGSAD015

The tertiary education qualification code indicates the level of qualification attributed to an applicant’s previous tertiary education.

The tertiary education level of qualification procedure enables users to create institution-defined codes to describe an applicant’s level of tertiary education qualification.

Optionally, map each code to a government level of qualification code, which is maintained in the Government Levels of Completion window. Mapping the tertiary education level of qualification code to a government level of qualification code enables data supplied by government to be converted into institution-defined values to enter against an applicant.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Qualification > Government Levels of Qualification window

Admission > Admission Setup > Setup Tertiary and Government Details > Tertiary Level Qualification > Tertiary Level Qualification window

Steps

1. Query the appropriate record in the Government Levels of Qualification.
2. Click **Academic History Education Level of Qualification Codes**.
The Tertiary Education Level of Qualification window appears.
3. Enter data in each field of the window as described in the table.
4. Save your work.

Table 10–13 Tertiary Education Level of Qualification Window Description

Field Name	Type	Features	Description
Tertiary Education Level of Qualification	Required		User-defined tertiary education level of qualification code
Description	Required		Tertiary education level of qualification code description
Tertiary Admission Center Level of Qualification	Optional	List of values	Government-defined tertiary education level of qualification code
Closed	Optional	Check box	If selected, prevents further use of the tertiary education level of qualification code

10.4.4 Setting Up Government Levels of Completion IGSAD020

The Government Levels of Completion window is used to create and maintain the government codes for the level of completion of tertiary studies.

Institution-defined level of completion codes are mapped to these codes in the Tertiary Education Level of Completion window. If a government offer file is loaded into Oracle Student System, the system enters the level of completion of the applicant's prior tertiary education. It is the institution value, derived from the government-supplied code, which is entered for the student.

The Tertiary Education Level of Completion Codes navigation button invokes the Tertiary Education Level of Completion window. Selecting a government code before navigating to the Tertiary Education Level of Completion window causes only the institution-defined codes mapped to this government code to be displayed in the Tertiary Education Level of Completion window.

Prerequisites

Tertiary Education Level of Completion IGSAD016

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Completion window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–14 Government Levels of Completion Window Description

Field Name	Type	Features	Description
Government Level of Completion	Required		Government level of completion code

Table 10–14 Government Levels of Completion Window Description

Field Name	Type	Features	Description
Description	Required		Government level of completion description
Closed	Optional	Check box	If selected, prevents further use of record
Academic History Education Level of Completion Codes		Button	Opens Tertiary Education Level of Completion window for users to enter user-defined levels of completion for tertiary education and map these to government-defined levels of completion

10.4.5 Setting Up Tertiary Education Level of Completion IGSAD016

The tertiary education level of completion procedure creates institution-defined codes to describe an applicant's tertiary education level of completion.

These codes are institution-defined tertiary education level of completion codes. The codes indicate the previous tertiary education level of completion identified by the applicant.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Completion > Government Levels of Completion window

Admission > Admission Setup > Setup Tertiary and Government Details > Tertiary Level Completion

Steps

1. Query the appropriate record in the Government Levels of Completion window.
2. Click **Academic History Education Level of Completion Codes**.
The Tertiary Education Level of Completion window appears.
3. Enter data in each field of the window as described in the table.

4. Save your work.

Table 10–15 Tertiary Education Level of Completion Window Description

Field Name	Type	Features	Description
Academic History Education Level of Completion	Required		User-defined tertiary education level of completion code
Description	Required		Tertiary education level of completion description
Government Level of Completion	Optional	List of values	Government-defined tertiary education level of completion code
Closed	Optional	Check box	If selected, prevents further use of record

10.4.6 Setting Up Government Secondary Assessment Types IGSAD023

The government secondary assessment types procedure enables entry of government secondary education assessment type codes.

Institution-defined secondary education assessment type codes can optionally be mapped to these codes in the Secondary Education Assessment Types window. When an offer file is loaded into Oracle Student System, the system enters the secondary education assessment type of the applicant. It is the institution value, derived from the government-supplied code, which is entered against the student.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission - Admission Setup- Setup Tertiary and Government Details - Government Secondary Assessment Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–16 Government Secondary Assessment Types Window Description

Field Name	Type	Features	Description
Government Secondary Assessment Type	Required		Code of government-defined secondary assessment type
Description	Required		Description of government-defined secondary assessment type
Closed	Optional	Check box	If selected, prevents further use of record
Secondary Education Assessment Types		Button	Opens Secondary Education Assessment Types window for users to enter user-defined secondary assessment types by state and map these to government-defined secondary assessment types

10.4.7 Setting Up Secondary Education Assessment Types IGSAD021

The secondary education assessment types procedure enters institution-defined local secondary education assessment type codes.

Each code can optionally be mapped to a government secondary education assessment type. This permits data supplied by government to be converted into institution-defined values for entering against an applicant.

It is recommended that if the government supplies this information the mapping of institution codes to government codes be a one-to-one relationship. It is also recommended that wherever practicable government codes should also be used for the institution-defined codes.

Select the Government Reported check box for the assessment type if its scores are reportable. This indicates that related scores should be included in government statistical reporting. It also activates the Government Score Mapping button, which displays the Assessment Type Government Score Mapping window.

Prerequisites

Government Secondary Assessment Types IGSAD023

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup- Setup Tertiary and Government Details > Government Secondary Assessment Types > Government Secondary Assessment Types window

Steps

Enter data in each field of the window as described in table. Save your work

Table 10–17 Secondary Education Assessment Types Window Description

Field Name	Type	Features	Description
Assessment Type	Required		Secondary education assessment type code
Description	Required		Secondary education assessment type description
State	Required	drop-down list	Codes of Australian states such as ACT, NSW, NT, QLD, SA, TAS, VIC, WA
Government Secondary Education Assessment Type	Optional	List of values	Secondary school type per management if private or independent, state or other
Government Reported	Optional	Check box	If selected, users must report institution's assessment type scores to government
Closed	Optional	Check box	If selected, prevents further use of secondary education assessment type
Government Score Mapping		Button	Opens Government Score Mapping window for users to enter institution and map institution scores to government scores in a given year and state for an assessment type Note: This is enabled if Government Reported checkbox for an assessment type checked.

10.4.8 Setting Up Assessment Type Government Score Mapping IGSAD022

If the government agency of a country requires institutions to report the tertiary entrance scores of new students who have completed year 12 within the country in the prior year, institutions are able to enter details of prior secondary education qualifications of students. These details include the tertiary entrance score and assessment type of the qualification. To enable the reporting of a tertiary entrance score to a government agency, the assessment type must be flagged as government reported in the Secondary Education Assessment Types window. The score reported must be from the government agency's common tertiary index entrance scores.

Institutions using other types of tertiary entrance scores must map these to the common index scores.

The assessment type government score mapping procedure maps local tertiary entrance scores to common index tertiary entrance scores.

The process that extracts the tertiary entrance scores of students for government reporting purposes checks that the score belongs to a government-reported assessment type. If so, it checks if the assessment type score is mapped to an assessment type government score or common index score. If a mapping exists, the common index score is reported. If no mapping exists, the secondary education score entered for the student is reported.

The Assessment Type Government Score Mapping window is used to map secondary education scores for secondary education assessment types that do not correlate with the government agency's common index schema to scores from that schema.

This mapping should be performed for all scores within a secondary education assessment type and must be repeated for each year the scoring schema is used.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Secondary Education Assessment Types > Secondary Education Assessment Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–18 Assessment Type Government Score Mapping Window Description

Field Name	Type	Features	Description
Secondary Education Assessment Type	Default display only		Secondary education assessment type code and description
State	Default display only		Code of state where given secondary education assessment type applicable
Assessment Type Government Score Mapping Region			
Obtained Year	Required		Year for which given institution score obtained
Institution Score	Required		Score of institution in given year and state for given secondary education assessment type
Government Score	Required		Equivalent government score to which given institution score is mapped

10.4.9 Setting Up Overseas Secondary Education Qualification IGSAD024

The international secondary education qualification procedure maintains institution-defined international secondary education qualification codes.

The Overseas Secondary Education Qualification window is used to enter the institution-defined international secondary education qualification codes.

These codes indicate the level of qualification attributed to an applicant’s international secondary education.

Each code can be mapped to a country code.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Overseas Qualification > Overseas Secondary Education Qualification window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–19 Overseas Secondary Education Qualification Window Description

Field Name	Type	Features	Description
Overseas Secondary Education Qualification	Required		Code of secondary education qualification used overseas
Description	Required		Description of secondary education qualification used overseas such as certificate, diploma
Country Code	Optional	List of values	Code of country where given secondary education qualification used
Closed	Optional	Check box	If selected, prevents further use of record

10.5 Admission Application Processing

This chapter provides an overview of the admission application processing functionality in the Admissions subsystem.

The admission application processing functionality enables users to set up data and enter data for admission application processing and application evaluation.

User Responsibilities

Administrative users enter applications either one at a time or in bulk. Applications are also entered by student self service users. Administrative users evaluate the applications for completion and admission acceptance using the admission application processing functionality.

Administrative users can also enter applications in self service.

To enter and evaluate applications, users must first capture applications. Applications are entered either by administrative users or student self service users. Administrative users then determine if the application is complete before processing the application. Lastly, administrative users evaluate the application

Admission Application Processing Process

The admission application processing process includes functionality to perform the following:

- establish admission process categories manually
- track documents

- collect test scores
- convert standardized test scores from one test type to another
- expand details of test scores
- identify missing documents or other items required to successfully process the admission application
- calculate various types of admission indices from data in Student System

Process Category is assigned at the time the application is entered into the Student System, not after the application is entered. The administrative user can assign requirements manually, or if the requirements are set in the admission process category, they can be assigned via the concurrent process. Next, if test score conversion and index calculation are not required, administrative users make an admission decision.

If test score conversion and index calculation are required, Student System converts test scores. Optionally, third party calculators can perform these steps. After test scores and indices are recorded, administrative users make an admission decision.

Admission Process Categories

Similar applications are organized into processing groups called admission process categories. Administrative users define admission categories and map process steps to those categories, resulting in admission process categories.

Admission process categories describe broad categories such as undergraduate, graduate, and professional. Once these categories are defined, users determine the admission process category steps that are required for the admission process category.

Admission process categories are then assigned to application instances.

The following topics are described in this section:

- Assigning Admission Process Categories
- Tracking Missing Items in Applications

Assigning Admission Process Categories

In the Direct Admission window, users select New Application, and the Session Details window appears. In this window, users enter the following for each application instance:

- academic calendar
- admission period

- admission process category

After entering this information, users then click **Continue** to enter the Applications window and enter information. In order to update the session details for a student, users must return to the Session Details window by clicking **Session Details**. Once the application instance is saved, users are unable to alter session details for that application instance.

Admission process categories are assigned as follows:

- Admission process categories are automatically assigned to the application instance when users select an application type in self service.
- Admission process categories are assigned via the import process from third party vendors.
- Admission process categories are also assigned to an application instance in the Session Details window when creating a new application instance.

Tracking Missing Items in Applications

Users associate admission process categories with tracking types and application instances in the Admission Process Category Detail window. This enables users to track missing items in applications.

In order to assign requirements to applications in addition to tracking type requirements, users click Rules on the Admission Process Category Detail window to set up application completion rule sets. Users specify rules that assign additional tracking types to a group of students and create new tracking items for those students.

The items will not be assigned to the application instance until the administrative user has run the concurrent process to assign these requirements.

Credentials

Credentials are materials other than applications needed for admission into institutions. Examples of credentials include the following:

- recommendations
- personal essays
- portfolios

Credentials are often received for an applicant before the actual application arrives. Credentials information is stored against the person. So if the information arrives

before the application is entered, the user would enter the information in the Credentials window which then saves the information against the person.

Required Documents

Each student who applies for admission has a set of requirements that he or she must complete. These requirements may be minimal or extensive.

Application completion rules governing which information or documents are required for each student can vary from one department to another in the same institution.

Once requirements are assigned, schools track the completion of each requirement by recording the date of receipt. Student System enables users to:

- manually add or delete requirements from an applicant's requirement set
- update requirement when test scores or transcript is imported or manually entered
- automatically establish an individualized communication track that is driven by missing items
- track status of missing documents and requests for documents
- define admission credential or specific required document sets based on applicant characteristics
- associate requirement sets to admission process categories
- itemize required credentials or documents based on students' characteristics and currently available documents
- set requirement to include academic history record at post-secondary level for an applicant who has the entry status of Transfer
- track transcript data as unofficial, official, or other user-defined statuses
- automatically determine when an application is complete

10.5.1 Setting Up Admission Categories IGSAD036

The admission category procedure enables users to enter user-defined, admission categories. Award, non-award, professional, undergraduate, doctorate are examples of admission categories. Admission categories are used to group applications. Applications are assigned Admission Process Categories which determine which fields or windows are available for the application.

Users can simultaneously map these to the institution's enrollment, fee and payment categories. Users can also place restrictions on program types for an admission category.

Prerequisites

Student Finance Fee Types IGSFI019

Enrollment Categories IGSEN009

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–20 Admission Categories Window Description

Field Name	Type	Features	Description
Admission Category	Required		admission category Note: Where an enrollment, fee, or correspondence category is mapped to a single admission category, one and only one of each must be set as the default. Note: Once admission categories have been used in Oracle Student System, only minor description modifications can be carried out and cannot be deleted.
Description	Required		description of admission category
Citizenship Type	Required	drop-down list	type of citizenship: All, Domestic, International; defaults to All
Closed	Optional	Check box	if selected, prevents further use of admission category
Contribution Option Mapping		Button	opens Contribution Option Mapping window for users to map admission category to one or more payment options Note: This setup cannot be completed until fee types have been setup in Student Finance.

Table 10–20 Admission Categories Window Description

Field Name	Type	Features	Description
Fee Category Mapping		Button	opens Fee Category Mapping window for users to map admission category to one or more fee categories
Program Type Restrictions		Button	opens Program Type Restrictions window for users to restrict admission category to one or more program types
Enrollment Category Mapping		Button	opens Enrollment Category Mapping window for users to map admission category to one or more enrollment categories

10.5.1.1 Mapping Payment Options to Admission Category

Institutions may require applicants to state the payment options to be used at the time of applying. Applicants for instance may need to work through college to support themselves, or they may have a mentor or be sponsored by their company. For an international student if funds have to be transferred between accounts across countries, fee deadlines may be difficult to meet and payment options may include, for example, Deferred Payment.

Users can map an admission category to more than one contribution payment option. After mapped and if users assign the process category step of Fee Assessment to the admission process category (APC), users can enter contribution payment options in the Applications window.

Prerequisites

Contribution Payment Options IGSEN007

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

10.5.1.2 Mapping Fee Categories to Admission Categories

Ideally users should map admission categories to fee categories assigning each a default fee category before assigning these to admission applications. Users can associate more than one fee category to an admission category but can only have one of them as default.

Prerequisites

Fee Categories IGSFI019

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–21 Fee Category Mapping Window Description

Field Name	Type	Features	Description
Fee Category	Required	List of values	fee category code to which admission category is mapped; tuition fees, late fees, examination fees, award fees
Description	Required		description of fee category
Default	Optional	Check box	if selected, sets fee category as default for admission category Note: For each admission category users can specify only one of the fee categories mapped as default.
Back		Button	returns users to Admission Categories window

10.5.1.3 Setting up Admission Category Program Type Restrictions

Users can restrict an admission category to selected program types. For example, for the admission category of Graduate, the program type can be undergraduate or non-award.

Users can further restrict an admission category to selected program offering options. For information on restricting program offering options, see Program Offering Option Admission Categories Procedure.

Prerequisites

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–22 Program Type Restrictions Window Description

Field Name	Type	Features	Description
Program Type	Required	List of values	program type code to which admission category is restricted; graduate degree, undergraduate degree, certificate, non-award, doctorate
Description	Required		description of program type
Back		Button	returns users to Admission Categories window

10.5.1.4 Mapping Enrollment Categories to Admission Categories

In the same way that users map admission categories to fee categories users must also map admission categories to enrollment categories before attaching these to admission applications. Users can associate more than one enrollment category to an admission category but can set only one as default.

Prerequisites

Enrollment Categories IGSEN009

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–23 Enrollment Category Mapping Window Description

Field Name	Type	Features	Description
Enrollment Category	Required	List of values	enrollment category code to which admission category is mapped; standard, research, conditional, international
Description	Required		description of enrollment category
Default	Optional	Check box	if selected, sets enrollment category as default for admission category Note: For each admission category users can specify only one of the enrollment categories mapped as default.
Back		Button	returns users to Admission Categories window

10.5.2 Setting Up Admission Process Category Detail IGSAD037

This window enables users to map an admission category to system-defined admission processes thereby creating different admission process categories.

The table describes system admission process types and their functions.

Table 10–24 Admission Process Types

Admission Process Type	Functions
Program	Used for typical direct admissions applications
Non-award	Used for admission to nonaward programs or a single subject; for this process type, users can only enter units for which the Award Only indicator is set to No
Re-admit	Used for applications for readmission to a previously discontinued program, where program code is identical to discontinued program code, but program offering option may be different; for such applications, offer response status can only be Accepted
Short Admission	Short Admission can only happen in the period that comes after the Apps Due date alias and before the Final Due date alias. Short refers to the time period for submitting the application, not the length of the program.

Table 10–24 Admission Process Types

Admission Process Type	Functions
Transfer	Used when applicant is enrolled and is applying for transfer from one program to another

For each admission process category, users can specify steps for processing. Users assign steps to a step group. Step groups are system-defined.

The table shows possible category step types for a system step group.

Table 10–25 Process Category Step Group

Process Category Step Group	Process Category Step Types
Person Data	Collects person information such as academic history, extra-curricular activities, credentials, secondary education, employment, recruitment details including mandatory person details such as aliases, addresses and holds
Person Validation	Allows the entry of the application to occur even without a title or date of birth being entered
Application Validation	Validates application against person holds, late applications, program preferences
Program Data	Collects program information such as admission test results, advanced standing, fee contract, application rating, key academic indicators, application outcome, offer response, research candidacy details
Program Validation	Validates program against program offering options and against holds on program and unit sets
Unit Validation	Validates units against holds, pre-set restrictions
Application Outcome	Deals with application outcomes such as automatic offer, conditional offers, multiple offers, admission outcome overrides, automatic pre-enrollment on offer, and automatic fee contract on pre-enrollment
Application Offer Response	Deals with offer response statuses such as automatic offer acceptance, deferred admission
Application Details	Collects application-related information such as educational goals, intent, desired unit sets, interests and talents, financial aid, reconsideration

Table 10–25 Process Category Step Group

Process Category Step Group	Process Category Step Types
Mandatory Application Details	Deals with basic application details such as admission code, basis for admission type, mapped enrollment and fee categories, rank set, completion period, advanced standing
Tracking	Tracks general pre and post admission requirements as defined by the user in tracking
Rating Details	Program approval
Mandatory Person Details	Collects basic person details such as addresses, aliases, holds, special needs, holds, international details

Users can further assign Mandatory status to these steps. Assigning steps to an admission process category determines fields that are available to users for entry during application entry. Assigning Mandatory status to processing steps determines fields that users must enter for application processing to occur.

For the Tracking step group, users can click Tracking Type to open the Tracking Types window and set individual tracking items for the step type and step group.

Admission Process Categories and Steps

Admission process categories represent the various admission processes of the institution and are established to group applicants or program types with similar admission requirements together. Oracle Student System can be configured to accommodate these admission processes.

At the beginning of an Oracle Student System admission session, an admission process category is specified.

Note: If an existing application is modified within the same session, the admission process category already associated with the application is retained.

Admission process categories define a particular admission procedure by specifying the steps involved in that procedure.

The set of steps associated with each admission process in an institution is entered in the system. These steps are grouped according to the type of admission information involved. When an admission process category is created, the system assigns to it the appropriate subset of steps from the set of all system-defined steps. The procedure can be further refined by adjusting the order in which the steps are displayed.

Each step equates to a window or a database process, such as validation, to be performed within the Admissions subsystem. For each step, the corresponding screen or database process is displayed and can be used. For example, when the step Person Detail is specified for an admission process category, the Person Detail Button is displayed in the Direct Admission window and the Person Details window can be accessed when that admission process category is used for a session.

When a particular admission process category is used in an admission session, users can only access those navigation buttons and related windows Required to perform the steps associated with that admission process category. The admission process category definition also determines whether certain activities, such as accepting late applications or permitting deferment, are permitted.

Prerequisites

Admission Categories IGSAD036

Tracking Types IGSTR011

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details window

Steps

1. Select the admission category for which the process is being defined.
2. Assign a system-defined admission process type to the category to create an admission process category.
3. Assign the steps for the process to the admission process category.

Table 10–26 Admission Process Category Detail Window Description

Field Name	Type	Features	Description
Admission Category	Display only		Admission category code: Undergraduate, Graduate, Research, Special, International, Non-award
Description	Display only		Name of admission category
Citizenship Type	Display only	Drop-down list	Citizenship type: All, Domestic, International; defaults to All

Table 10–26 Admission Process Category Detail Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Admission Process Category and Admission Process Category Step regions are automatically refreshed and coordinated with data in the header region
Admission Process Category Region			
System Admission Process Type	Required	List of values	System-defined admission process type: Program, Non-Award, Re-Admit, Short Admission, Program Transfer Note: For admission process type of Program, the Pref-Limit step can be set to enable users to enter preferences.
Offer Date Response Offset	Optional		Defines the grace period in days, starting the day after the offer response deadline
Admission Processing Rules		Button	Opens Admission Process Category Tracking Rules window for users to add and edit rules attached to an Admission Process Category (APC)
Post Admission Rules		Button	Opens Admission Process Category Tracking Rules window for users to add and edit post-admission rules attached to an Admission Process Category (APC)
Admission Process Category Step Region			
Step Group Type		Drop-down list	Defaults to Person Data, first in the list of step group types; possible step group types relate to person, program, unit, application, rating, tracking, outcome, and offer response data capture or validations
Default Steps		Button	For a new APC (process type and admission category), attaches all the step types for the step group in one go
Process Category Step Type	Required	List of values	Step type for step group of APC; for example, for the GRAD APC and Person Data step group, step types could be person details, academic history, credentials, extra-curricular activities, holds

Table 10–26 Admission Process Category Detail Window Description

Field Name	Type	Features	Description
System Tracking Type	Display only		Displays system tracking type associated with step type used to differentiate between admission processing and post admission requirements; examples of system tracking types are admission processing, post admission, thesis examination, thesis panel member, assignment
Number Restriction	Optional		Sets limit on step type; enabled only if number restriction is Y for step type; for example, for Person Data step group, user can set maximum number of obsolete person aliases allowed to be entered
Step Order	Optional		Defaults to sequential order for step types selected; users can change the order of step types
Mandatory	Optional	Check box	If selected, step type must be completed for the step group and APC Note: For step types other than Person Details, Unit Placement, Key Academic Indicators and Ratings, users can change or update mandatory status.
Tracking Types		Button	Opens the Tracking Types window for users to create tracking types or step types for the Tracking step group Note: This Button is enabled only for the Tracking step group.

10.5.3 Setting Up Admission Process Category Tracking Rules IGSAD037

The admission process category tracking rules procedure enables users to set up rules for admission processing and post admission tracking for an admission process category.

Each rule returns one or more tracking types depending on if the applicant satisfies the conditions defined in the rule. Rules defined for an Admission Process Category (APC) are validated and the tracking requirements or the tracking types attached to the student during admission by running the concurrent process to assign the requirements, or by clicking the assign requirements button to assign for the specific application instance.

For example, if the Tracking region on this window had Process Category step type is Undergraduate Freshman, and there is a rule that includes another Tracking step type in the Then clause, any Rule Tracking Types would be assigned in addition to the APC base Tracking Types. Whenever requirements are assigned, base APC

Tracking Types and any applicable Tracking Types defined using Rules are assigned together.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Steps

1. Query for the APC for which you plan to define a Rule. Once the APC is in context, click on either the Admission Processing Rules or the Post Admission Rules button. Each button ensures that the Rules defined on the following windows will be marked in the system as Admission Processing or Post Admission.
2. On the Admission Process Category Tracking Rules window, click the Add Rule button to create a new Rule. Click the Edit Rule button to edit an existing Rule.
3. On the Rule window, enter a Rule Description. In this example, the description for the Rule will be 'Application Date Rule'.
4. Rules can be entered manually in the Rule Text tab in the window, or Rules elements can be selected from a list of valid values displayed in the Rules Options region at the bottom of the window. Rules can also be entered using a combination of these methods.

Table 10–27 Admission Process Category Tracking Rules Window Description

Field Name	Type	Features	Description
Admission Category	Default display only		Description of admission category
System Admission Process Type	Default display only		Description of system admission process type
Admission Processing or Post Admission Rules Region			
Data Coordination Check Box	Optional	Check box	If selected, data in the Admission Processing or Post Admission Rules region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Admission Processing or Post Admission Rules region is refreshed only when the user navigates to the Rule Description field in the Admission Process Category Tracking Rules region. Leave deselected to speed up performance when querying records
Rule Description	Default display only		Rule description or name
Rule Text	Default display only		Actual rule text
Comment	Default display only		Additional explanation of given rule
Add Rule		Button	Opens Rule window for users to enter rule description or name and explanation or text for admission process category
Edit Rule		Button	Opens Rule window for users to edit rule entered for admission process category; see above

10.6 Admission Application Types

10.6.1 Setting Up Admission Application Types IGSAD085

The Application Types window enables users to set up different admission application types and map them to existing Admission Process Categories (APCs). If an application fee is required, then for each application type created, users must

define the amount charged as application fee and attach it to account codes used to record fee receipt.

Note: You must save General Ledger revenue and cash account codes if the Oracle Financials profile option is set to Yes and an application fee amount is entered. If the Oracle Financials profile option is set to No, the revenue and cash account codes must be set up in Student Finance and entered.

Prerequisites

Admission Process Categories IGSAD037

Personal Statement Types IGSAD086

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Types > Application Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–28 Application Types Window Description

Field Name	Type	Features	Description
Admission Application Type	Required		Admission application type code
Description	Required		Admission application type description
Admission Process Category	Required	List of values	Admission process category
Configurability Function Name	Optional	List of values	OSS form functions Users can map application type to OSS form functions for use in self service.
Closed		Check box	If selected, prevents further use of record
Personal Statements		Button	Opens Personal Statement Self Service Requirements window
Admission Test Types		Button	Opens Admission Application Test Type Configuration window
Self Service Pages		Button	Opens Self Service Pages window
Enrollment Deposit Amount	Optional		Enrollment Deposit Amount
Enrollment Deposit Level	Display only		Enrollment Deposit Level
Admission Enrollment Deposit Levels Details	Optional	Button	Opens the Enrollment Deposit Levels Details window

10.6.2 Setting Up Application Fees for Application Types

For each application type created, users must define the amount charged as application fee and attach it to account codes used to record fee receipt.

Prerequisites

Admission Process Categories IGSAD037

Personal Statement Types IGSAD086

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Types > Application Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–29 Application Fee Tab

Field Name	Type	Features	Description
Application Fee Tab			
System Default	Optional	Check box	If selected, indicates that fee is system default
Closed	Optional	Check box	If selected, prevents further use of an application fee
Application Fee Amount	Optional		Application fee amount
General Ledger Revenue Account Code	Optional		General Ledger Revenue Account Code
Revenue Account Code	Display only		Revenue Account Code
General Ledger Cash Account Code	Optional		General Ledger Cash Account Code
Cash Account Code	Display only		Cash Account Code

10.6.3 Setting Up Self-Service Pages

Clicking the Self Service Pages button navigates to the Self Service Pages window. It lists pages to be displayed in self service for an admission application type. Users can deselect pages to be excluded from display in self service, however, pages with required fields checkbox marked cannot be excluded from self service.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Application Types window

Steps

- 1. Query the appropriate record.
- 2. Click **Self Service Pages**. The Self Service Pages window appears.
- 3. Enter data in each field of the window as described in the table. Save your work.

Table 10–30 Self Service Pages Window Description

Field Name	Type	Features	Description
Admission Application Type	Default, display only		Admission application type code
Self Service Pages Region			
Page Name	Display only		Name of page to be displayed
Include		check box	Checked by default to display page named to self service applicant Note: uncheck to remove page named from display
Required Fields	Optional	Check box	If selected, you must save information on the page before the Section Status for the page can be updated to Complete. In Applicant Self Service, an application cannot be submitted unless all of the application sections are Complete.
Back		Button	Returns to Application Types window

10.6.4 Setting Up Self Service Requirements for Personal Statements

Clicking the Personal Statements button navigates users to the Personal Statement Self Service Requirements window. It enables users to assign personal statement requirements to admission application types for self service. Institutions may need applicants to submit multiple personal statements to satisfy admission requirements.

The Personal Statement Self Service Requirements window includes the following buttons:

- **Group Requirements**

Clicking the Group Requirements button opens the Group Requirements window. It enables users to set minimum requirements for personal statement groups attached to an admission application type.

- **Personal Statement Types**

Clicking the Personal Statement Types button opens the Personal Statement Types window.

- **Tracking Types**

Clicking the Tracking Types button opens the Tracking Types window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Types window

Steps

1. Click **Personal Statements**.

The Personal Statement Self Service Requirements window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 10–31 Personal Statement Self Service Requirements Window Description

Field Name	Type	Features	Description
Admission Application Type	Default, display only		Admission application type code
Personal Statement Requirements Region			
Statement	Required	List of values	Personal statement type code
Description	Display only		Personal statement type description
Group Number	optional		Group number of personal statement

Table 10–31 *Personal Statement Self Service Requirements Window Description*

Field Name	Type	Features	Description
Mandatory		check box	If selected, makes personal statement a mandatory requirement for admission
Group Requirements		Button	Opens Group Requirements window
Personal Statement Types		Button	Opens Personal Statement Self Service Requirements window for users to set up personal statement types for a self service admission application type
Tracking Types		Button	Opens Tracking Types window for users to set up tracking types for personal statements of a self service admission application type

10.6.5 Setting Up Group Requirements

The Group Requirements window enables users to set minimum requirements for personal statement groups attached to an admission application type.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Types window

Steps

1. Query the appropriate record.
2. Click **Personal Statements**.
The Personal Statement Self Service Requirements window appears.
3. Click **Group Requirements**.
The Group Requirements window appears

4. Enter data in each field of the window as described in the table. Save your work.

Table 10–32 Group Requirements Window Description

Field Name	Type	Features	Description
Admission Application Type	Default, display only		Admission application type code
Group Requirements Region			
Group Number	Default, display only		Group number of personal statements attached to application type
Minimum	Required		Minimum number of personal statements required for group
Self Service Message	optional		Message to be displayed to self service applicant for group
Back		Button	Returns to Personal Statement Self Service Requirements window

10.7 Calendar Date Aliases for Admission System Processes

10.7.1 Setting Up Admission Period Calendars IGSAD043

The admission period calendars procedure restricts program offering options within an admission period and defines admission category and process type combinations valid for particular admission periods.

Note: For system admission process types Program Admission Process, Non-Award Studies Admission Process, and Program Transfer Process, program offering patterns can be specified only if their program version has no expiry date entered against it.

Before using the Admission Period Calendars window, course offering options must be linked to admission categories using the Program Offering Option Admission Categories window.

The establishment of admission periods is carried out in the Calendar subsystem.

Details associated with admission calendars, like those entered in the Admission Period Calendars window, are not rolled over when the calendar rollover process is

performed. A process is executed from this window to roll these details into new admission periods created by the Calendar Rollover process.

Modifying Admission Calendars

The types of admissions that are valid in particular admission periods are restricted by the configurations entered in the Admission Period Calendars window.

The Admission Period Calendars window allows users to enter categories of admission applications that are allowed in an admission period. Valid process types for the selected admission categories are also displayed.

For each admission period and Admission Process Category, the program offering patterns being offered can be restricted to offerings at particular locations, particular attendance modes, and attendance types, or any combination of these. For example, a midyear intake of students can be restricted to offerings of a program at a particular campus.

Note: The program offering options potentially available to an admission period, admission category, and process type combination are linked to the admission category in the Program Offering Option Admission Categories window.

Prerequisites

Admission Categories IGSAD036

Admission Process Category Details IGSAD037

Calendar Types IGSCA002

Basic Program Details IGSPS013

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Calendar window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–33 Admission Period Calendars Window Description

Field Name	Type	Features	Description
Admission Period Region			
Calendar Type	Display only		Calendar type and description
Effective Dates	Display only		Effective date and description
Commencement Period	Display only		Admission commencement period
Calendar Status	Display only		Admission calendar status
Admission Period Rollover		Button	Runs the Admission Period Rollover concurrent process
Admission Period Admission Category Region			
Admission Category	Required		Admission category
Description	Display only		Admission category description
Admission Process Type Region			
Admission Process Type	Required	List of values	Valid admission process type for each admission category Note: When the user enters the region, the admission process types available to the displayed admission category are shown. These are maintained in the Admission Process Category Detail window. If it is Required that a subset of process types be available in that particular admission period, process types can be deleted here.
Program Offering Patterns		Button	Opens Admission Period Admission Processing Category and Admission Period Program Offering Patterns regions
Admission Period Admission Process Category Region			
Calendar Type	Default display only		Calendar type code and description

Table 10–33 Admission Period Calendars Window Description

Field Name	Type	Features	Description
Effective Dates	Default display only		Effective date and description
Calendar Status	Default display only		Admission calendar status
Commencement Period	Default display only		Admission commencement period
Admission Category	Default display only		Admission category code
Admission Process Type	Default display only		Description of admission process type
Admission Period Program Offering Patterns Region			
Apply Program Offering Option Restrictions	Optional	Check box	If selected, only the restricted program offering patterns are displayed Note: Deselecting the check box displays all program offering patterns.
Program Code	Display only		Program code and description
Title	Display only		Program title
Location Code	Display only		Program location code
Attendance Mode	Display only		Admission attendance mode
Attendance Type	Display only		Admission attendance type
Admission Period Program Offering Option Restriction Region			
Program Code	Required	List of values	Program code and description
Short Title	Display only		Program title
Location Code	Optional	List of values	Program location code
Attendance Mode	Optional	List of values	Admission attendance mode

Table 10–33 Admission Period Calendars Window Description

Field Name	Type	Features	Description
Attendance Type	Optional	List of values	Admission attendance type
Include in Rollover	Optional	Check box	If selected, causes the restriction to be included in the Admission Period Rollover process Note: When a restriction is entered, the check box is automatically selected and must be deselected if not Required.
Default		Button	Selected when no restrictions are currently entered causes all available program offerings to be defaulted into this region. Those which will not be made available are then deleted by the user.

Rolling Over Admission Calendars

Admission calendars can be rolled over and used in future academic periods with the Admission Period Calendars window.

If all admission periods for an academic period are to be rolled over, use the Admission Period Rollover Process batch job. This process rolls over all admission periods for an academic period.

Note: The admission process category and program offering option restriction details attached to admission periods are rolled over in this process.

Note: If all admission periods for an academic period are to be rolled over, use the Admission Period Rollover Process batch job. This process rolls over all admission periods for an academic period.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Calendars

Steps

1. Perform the rollover calendar process so that the new admission period instances exist and the system can identify the source instances when

performing the admission calendar rollover process. Typically, the academic year calendar and all its associated calendars and date alias instances, including admission calendars, are rolled over. The dates defining each calendar instance and related date alias instances are checked in the Rollover Calendar report and adjusted where necessary.

2. Perform the program structure rollover process so that rolled over admission period program offering option restrictions can be created for the new program offering options.
3. Execute a query in the Admission Period Calendars window to locate each new admission period.
4. When a relevant admission period is displayed, select the **Admission Period Rollover** button. The system recognizes which admission period the displayed period was rolled over from and rolls over admission category, process type, and program offering option restriction information from the source period to the new period.
5. Check the Admission Calendar Rollover report to determine if any warnings were encountered during the admissions rollover process.
6. Make any required amendments to the rolled over data in the Admission Period Calendars window.

Calendars can be rolled over as far into the future as required. The 1999 calendar structure, for example, must be rolled over into 2000 to allow the 1999 admission period details to be rolled over, but it can also be rolled over into 2001, 2002, and beyond if necessary. To operate effectively, the admission deferment process requires that calendars be rolled over far enough into the future to enable the admission period, and admission process category apply to the deferred program application, to be entered when the deferment period ends. Otherwise, the user cannot defer the applicant to an admission period since none exists. Another solution is to limit deferment to renewable periods of 12 months.

10.7.2 Setting Up Admission Period Date Overrides IGSAD044

The Admission Period Date Overrides window is used to alter admission-related date alias instances. For example, the window can be used for the easy extension of admission application closing dates while still retaining a record of the original closing date. The new date is termed the override date.

An override date can be created for all program offerings in an admission period-admission category or for a subset of the program offerings. This window acts as a restriction window.

Specifying any of admission process type, program code, location code, attendance mode, or attendance type restricts the use of the altered date alias instance to program offerings matching the specified parameters. Program offerings that do not match continue to be subject to the original date.

For example, the Calendar Rollover process has created a new admission period with a program application closing date of 01-OCT-2000. The institution determines that while this date is correct for most programs, off-campus program applications for a particular admission category should close later than other programs, on 20 October. This information is entered in this window.

The Direct Admission process checks the options entered for each program application. When Oracle Student System encounters an application for on-campus study, it checks for any on-campus override matches for the application's program offering option. None exist, so the application closing date is 01-OCT-2000. When Oracle Student System encounters an application for off-campus study and checks for off-campus override matches for the application's program offering option, it finds the override date, 20-OCT-2000. 20-OCT-2000 is then used as the closing date for that application and is used to determine whether or not the application is late.

Prerequisites

Admission Categories IGSAD036

Admission Period Calendars IGSAD043

Calendar Types IGSCA002

Basic Program Details IGSPS013

Locations IGSOR031

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Date Overrides window

Steps

1. Query the appropriate data to locate the admission period admission category for which a date is to be changed.

Note: The associated date aliases are displayed.

Selecting a date alias, for example, application closing date, displays its original instance for the particular admission period admission category and displays any override instances previously created, for example, at this point the only instance is 01-OCT-2000.

2. Enter data in each field of the window as described in the table.
3. Save your work.

Table 10–34 Admission Period Date Overrides Window Description

Field Name	Type	Features	Description
Admission Period Admission Category Region			
Calendar Type	Display only		Admission calendar type and description
Effective Dates	Display only		Effective start and end dates
Calendar Status	Display only		Admission calendar status
Admission Category	Display only		Admission category and description
Admission Period Admission Category Date Alias Instance Region			
Data Coordination Check box	Optional	Check box	If selected, data in the Admission Period Admission Category Date Alias Instance region is automatically refreshed and coordinated with data in the Admission Period Admission Category region. If deselected, data in the Admission Period Admission Category Date Alias Instance region is refreshed only when the user navigates to the Admission Type field in the Admission Period Program Offering Option Date Overrides region. Leave deselected to speed up performance when querying records.
Date Alias	Display only		Date alias associated with calendar type
Description	Display only		Date alias description
Date Value	Display only		Date selected for date alias
Program Offering Pattern		Button	Opens the Program Offering Pattern Date region
Date Alias Instance		Button	Opens the Calendar Date Alias Instances window

Table 10–34 Admission Period Date Overrides Window Description

Field Name	Type	Features	Description
Admission Period Program Offering Option Date Overrides Region			
Admission Process Type		List of values	Admission process type
Program Code		List of values	Admission program code
Location Code		List of values	Program location
Attendance Mode		List of values	Admission attendance mode
Attendance Type		List of values	Admission attendance type
Override Date Value		Calendar	Override date value for a specified admission period
Include in Rollover	Optional	Check box	If selected, includes override information when the calendar is rolled over

10.7.3 Setting Up Admission Calendar Configuration IGSAD018

The admission calendar configuration procedure enables users to map system-defined admission date aliases to institution-defined admission date aliases.

For the Admission subsystem to operate, certain critical dates must be specified. Institutions can choose the names for these dates and enter them in the Admissions Calendar Configuration window. The date alias instances, or the actual values, of these admission calendar dates are entered in the Calendar subsystem.

For example, Oracle Student System requires a due date alias, a date when admission applications for an admission period must be received by an institution. The institution assigns a code Appl-Due to this date alias. For Oracle Student System to recognize the system-defined admission date alias Appl-Due, Appl-Due must be entered in the Admissions Calendar Configuration window as the due date alias.

Note: Date aliases must not be closed.

The Due Date Alias, Final Date Alias, Change of Preference Date Alias, Offer Response Date Alias, Initialize Adm Period Date Alias, Hold Check Date Alias,

Program Start Date Alias, Short Admission Start Date Alias fields relate to admission periods. Each of these date aliases must have a system calendar category of admission and instances created in each admission period.

The Summer Comp Period Date Alias, Mid Completion Period Date Alias, End Completion Period Date Alias fields relate to academic periods. Each of these date aliases must have a system calendar category of ACADEMIC and have instances created in each academic period. These are used to determine whether students complete their program midyear, at the end of the year, or at the end of a summer teaching period.

Note: Calculating an anticipated completion year and period results in a date related to one of the academic period date aliases, whichever one follows the calculated date.

Note: Academic period date aliases are not related to admission periods.

The admission processing tracking item date alias and post admission tracking item date aliases relate to admission tracking items created for an applicant. Institutions can select existing Date Alias codes defined by the institution and enter them in the Admissions Calendar Configuration window. The inquiry calendar type sets the default Admission period for inquiry instances created without an admission period specified. Date Aliases for admission tracking items must have a category of admission.

See Chapter 5, "Systemwide Services: Calendar" for more information.

Varying Dates for Admission Period Admission Categories

Dates set up for an admission period admission category can be adjusted without losing the original dates, for example, if an admission application closing date extension applies only to particular locations, attendance modes, or attendance types, with the Admission Period Date Overrides window.

The following system date aliases can be varied:

- due date aliases
- final date aliases
- offer response date aliases

The following sample scenarios show situations in which dates are varied for admission period categories:

- The calendar rollover process creates a new admission period with a program application closing date of 01-OCT-1998. The institution determines that although this date is correct for most programs, off-campus applications for a

particular admission category should close later than other programs, on 20-OCT-1998. The new closing date is entered for off-campus mode only in the Admission Period Date Overrides window.

- When entering an application for admission in the Direct Admissions Program window, the Direct Admissions process checks the options entered for each program application. When the system encounters an application for on-campus study, it checks for any on-campus override matches. If none exists, the application closing date is 01-OCT. When the system encounters an application for off-campus study and checks for off-campus override matches, it finds a match if no other attributes that exclude this application are defined for the override record. The closing date for that application is 20-OCT.

Note: The user can include these override dates in the admission calendar rollover process, although excluding the override dates is recommended.

10.7.4 Mapping Admission Calendar Configuration IGSA018

Use the Admissions Calendar Configuration window to map system-defined admission date aliases to institution-defined admission date aliases.

Prerequisites

Calendar Types IGSCA002

Date Alias Instances IGSCA009

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Calendars > Configure Admission Calendars window

Steps

Enter data in each field of the Admissions Calendar Configuration window. Save your work.

Table 10–35 Admissions Calendar Configuration Window Description

Field Name	Type	Features	Description
Due Date Alias		List of values	Admission application due date Note: Late fees can be charged for applications received after this date.
Final Date Alias		List of values	Admission applications final date
Change of Preference Date Alias		List of values	Final date when admission applicants can change their program preferences
Offer Response Date Alias		List of values	Final date when applicants must respond Note: A default offer response date offset can be specified in the Admission Process Category Detail window, or entered as an admission program application's offer response date when an offer is made. Note: If the offer response date comes after the date of the offer response date alias, the latter takes precedence.
Initialize Admission Period Date Alias		List of values	Date when background processing for an admission period runs Note: Background processing includes preenrolling applications granted deferment in a previous admission period and reactivating applications rejected in a previous admission period where the applicants have requested reconsideration.
Hold Check Date Alias		List of values	Date when applications are checked for encumbrances
Program Start Date Alias		List of values	Date when teaching of programs starts Note: The expected completion date of program attempts is calculated from this date.
Short Admission Start Date Alias		List of values	Date when short admission process applications can start to be processed Note: A short admission process can occur only between this and the final date alias.

Table 10–35 Admissions Calendar Configuration Window Description

Field Name	Type	Features	Description
Summer Comp Period Date Alias		List of values	Date against which a calculated program completion date is compared
Mid Completion Period Date Alias		List of values	Date against which a calculated program completion date
End Completion Period Date Alias		List of values	Date against which a calculated program completion date is compared
Admission Processing Tracking Item Date Alias		List of values	Date when admission process tracking items are due to be completed for an applicant Note: The tracking item completion due date for admission processing tracking items defaults to the date specified for the date alias.
Post Admission Tracking Item Date Alias		List of values	Date when post admission process tracking items are due to be completed for an applicant Note: The tracking item completion due date for post admission processing tracking items defaults to the date specified for the date alias.
Inquiry Calendar Type		List of values	Inquiry calendar type; used to derive the term of entrance for an inquiry instance if the same is not specified when an inquiry is entered

10.8 Admission Application Codes

10.8.1 Setting Up Application Detail Codes IGSAD058

Use this procedure to define sources of applications, entry levels and statuses, levels of qualification, reasons for decision and pending decision, rating types and special groups.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Details Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–36 Application Details Codes Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Application detail class: application source, entry level and status, level of qualification, decision or pending reason, rating type, special admission category, special groups
Code Name	Required		Code of user-defined application detail subclass within given class
Description	Required		Description of application detail subclass
System Method	Required	List of values	System-defined application detail subclasses
System Default	Optional	Check box	If selected, the user-defined subclass is taken as system default for the given application detail class
Closed	Optional	Check box	If selected, prevents further use of application detail code

10.8.2 Setting Up Rating Scales IGSAD059

Use this procedure to define rating scales and their values. Once set, evaluators can use these scales and values to record their assessment of applications.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Rating Scales

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–37 Rating Scales Window Description

Field Name	Type	Features	Description
Rating Scale Name	Required		Name or Code of rating scale
Description	Required		Description of rating scale: numerical, alphabetical, alphanumeric, qualitative
Closed	Optional	Check box	If selected, prevents further use of rating scale
Rating Scale Values Region			
Rating Scale Value	Required		Rating scale value
Description	Required		Description of the rating scale value
Closed	Optional	Check box	If selected, prevents further use of rating scale value

10.8.3 Setting Up Personal Statement Types IGSAD086

The Personal Statement Types window enables users to set up, query, and update multiple personal statements to be used for different application types. Each personal statement represents a single essay question. Mapping a personal statement type to a tracking step code enables users to track the personal statement produced by the applicant.

Users can create a tracking step code for a new personal statement type, by saving it and clicking Create/Update Tracking Step. Clicking Create/Update Tracking Step copies the personal statement description in the Tracking Step Catalog window and assigns the personal statement type as the tracking step code. Saving the new tracking step created and closing the Tracking Step Catalog window populates the tracking step code in the Personal Statement Types window. Users must save the record after the tracking step code is populated to attach the tracking step to the personal statement.

A new personal statement type can also be mapped to existing tracking step codes from the List of values in the Personal Statement Types window.

For existing personal statement types, clicking Create/Update Tracking Step enables users to change the tracking step code from the List of values in the Tracking Step Catalog window.

Users can also set up tracking step codes before setting up personal statement types in the Tracking Step Catalog window in the Tracking subsystem.

Prerequisites

Tracking Step Catalog IGSTR011

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Personal Statement Types > Personal Statement Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–38 *Personal Statement Types Window Description*

Field Name	Type	Features	Description
Personal Statement Type	Required		Personal statement type
Description	Required		Personal statement type description
Tracking Step Code	Optional	List of values	Personal statement type tracking step code
Closed	Optional	Check box	If selected, prevents record from further use
Create/Update Tracking Step		Button	Opens Tracking Step Catalog window

10.8.4 Setting Up Applicant Goals IGSA058

In this window users can set up institution-defined educational goals and intent types. Once set, users can enter information that can be of use in recruitment and even in admission decisions.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Applicant Goals window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–39 *Applicant Goals Window Description*

Field Name	Type	Features	Description
Class	Required	List of values	Educational goals or applicant intent
Code Name	Required		Educational goal, applicant intent code
Description	Required		Educational goal, applicant intent name or description
System Method			Not functional
System Default		Check box	Not functional
Closed	Optional	Check box	If selected, prevents further use of record

10.8.5 Setting Up Credential Ratings IGSAD058

The Credential Ratings window enables users to set up rating values for applicant credentials. Reviewers assigned to review applications can also review the credentials of the applicant.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Credential Ratings > Credential Ratings window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–40 *Credential Ratings Window Description*

Field Name	Type	Features	Description
Class	Required	List of values	class or type of credential rating
Code Name	Required		code of user-defined credential rating subclass
Description	Required		description of credential rating subclass: excellent, fair, good, poor
System Method			disabled as no system-defined subclasses for credential ratings
System Default		Check box	functionality not available
Closed	Optional	Check box	if selected, prevents further use of Credential Rating code

10.8.6 Setting Up Admission Credential Types IGSAD066

Many institutions require applicants to submit their credentials, including portfolios, and letters of recommendation, before considering them for acceptance in a program.

The admission credential types procedure enables users to define admission credential types, and map these to system-defined credential types. Users can simultaneously attach tracking steps to user-defined credential types or change attached steps.

Prerequisites

Tracking Step Catalog IGSTR011

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Credential Types > Admission Credential Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–41 Admission Credential Types Window Description

Field Name	Type	Features	Description
Credential Type	Required		User-defined credential type code
Description	Required		User-defined credential type description; for example, work samples, work experience certificate, feedback forms
System Type	Required	List of values	Preseeded system credential types such as Audition, Essay, Interview, Portfolio, Recommendation Letter, and User-Defined
Tracking Step Code	Optional	List of values	Tracking step code used to track credential type
Closed	Optional	Check box	If selected, prevents further use of Credential Type
Create/Update Tracking Step		Button	Opens Tracking Step Catalog window for users to create new tracking step or modify tracking step details

10.8.7 Setting Up Interests IGSAD058

Use this procedure to set up institution-defined special talents and special interests of applicants. Information entered under these heads later can be used to determine classes or activities that may be conducted and influence admission or recruitment decisions.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Interests window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–42 Interests Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Special interest or special talent
Code Name	Required		Sspecial interest or special talent code
Description	Required		Special interest or special talent name or description
System Method			Not functional
System Default		Check box	Not functional
Closed	Optional	Check box	If selected, prevents further use of the record

10.8.8 Setting Up Probability Details IGSAD058

Probability types indicate an applicant’s probability of applying for a program, the probability of being granted admissions, and the probability of the applicant enrolling. Probability sources are user-defined, and can include the firms that are hired to calculate the probability of an inquiry turning to an application, an applicant receiving an admission offer and an applicant enrolling. The institution may itself calculate probability values or may outsource this job.

The Import Probability Values concurrent process can be used to import multiple probability values for a person.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Probability Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–43 Probability Details Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Probability detail class: probability type, probability source
Code Name	Required		Code of user-defined probability subclass in probability class
Description	Required		Description of user-defined probability subclass in probability class
System Method			Not functional
System Default		Check box	Not functional
Closed	Optional	Check box	If selected, prevents further use of record

10.8.9 Setting Up School Applying To IGSAD082

The School Applying To window enables users to retrieve information about the applicant school selections within institution. User can create different school applying to with detail description and attach it to an institution, selected from the list of values. Users can enter additional record or modify existing records.

The school applying to procedure enables institutions with multiple schools to designate the school within the institution to which the applicant is applying.

Prerequisites

Organizational Units IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > School Applying To window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–44 School Applying To Window Description

Field Name	Type	Features	Description
School Applying To	Required		Code of school applying to; these could be departments schools or colleges within the user institution
Description	Required		Name of school applying to
Organization Unit	Required	List of values	Organizational unit identifier per level of education and discipline such as business school, science college, law school
Closed	Optional	Check box	If selected, prevents further use of the record

10.8.10 Setting Up Admission Application Note Types IGSAD067

Notes related to program application instances can be entered in the system. Assigning types to notes allows notes of the same type to be produced in a report and queried.

The note types procedure sets up note types in the system.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Note Types > Admission Application Note Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–45 Admission Application Note Types Window Description

Field Name	Type	Features	Description
Note Category	Optional	List of values	Note category: application, decision
Note Type	Required		Note type code; for example, for the note category of application, note types can be evaluation, person
Description	Required		Description of note type
Closed	Optional	Check box	If selected, prevents further use of application note type

10.9 Transcripts and Grade Conversion

10.9.1 Setting Up Transcript Information IGSAD058

Use this procedure to to set up sources, grading scales, unit grades, and descriptions of unit performance. Possible difficulty descriptions for a unit could be an advanced or honors level of study or remedial.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Transcript Information window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–46 Transcript Information Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Transcript information class: grading scale types, transcript source, unit difficulty, unit grades
Code Name	Required		For transcript class, code of user-defined transcript subclass; for example for the transcript information class of Unit Difficulty, values can be Advanced, Honors, Remedial
Description	Required		Transcript subclass description
System Method			Disabled as no system-defined transcript subclasses
System Default		Check box	Not functional
Closed	Optional	Check box	If selected, prevents further use of transcript value

10.9.2 Setting Up Grade Conversion Details IGSAD068

Other institutions may use a grading scale other than one used by the user institution. In such cases, when capturing academic history details, unit grades given to applicant by the previous institution need to be recalculated before this information can be of use.

In the Grade Conversion window users set converted values for grades for various grading scales other than the one used by the user institution. This is then applied for recalculation of previous unit grades.

Prerequisites

Transcript Information IGSAD058

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Grade Conversion Details > Grade Conversion window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–47 Grade Conversion Window Description

Field Name	Type	Features	Description
From Grading Scale	Required	List of values	code and description of original grading scale
To Grading Scale	Required	List of values	code and description of new grading scale
[Data Coordination Check Box]	Optional	Check box	if selected, refreshes data in the Grade Point Average region and coordinates it with the header region
Grade Point Average Region			
From	Required		original grade using original grading scale
To	Required		equivalent grade after conversion using the new grading scale

10.10 Application Types and Fee Information

10.10.1 Setting Up Application Types IGSAD085

The Admission Fees process deals primarily with application fees charged for the submission and review of each application. To track application fee payment, administrators must create user-defined admission application fee codes and admission fee statuses. For self service applicants, administrators must set up application fees for admission application types and map them to available admission process categories.

In the case of applicants applying through self service and making credit card payments online, this fee information is updated automatically in the Application Fees window.

The Admission Fees process also enables users to establish fee contracts, run predictive fee assessments, and record post-admission enrollment fee details. Ideally Student Finance Administrators should record this information in the Student Finance subsystem to ensure that the amount is credited to the applicant's account.

To enable the fee contract functionality of the Admission Fees process, users must set up required fee structure in the Student Finance subsystem.

Student self service users can pay application fees in self service using credit cards. To create reference data for application fee payment via self service, administrators must set up fee payment methods, fee statuses, and fee types in the Application Fee Information window and set up application fee amounts for self service application types in the Admission Application Types window. The information set up in the Application Fee Information window is displayed in the Application Fee window.

Note: Institutions must define account codes to be used to record the receipt of the application fee.

Administrative users can also manually enter fee payment information in the Application Fee window.

10.10.1.1 Setting Up Admission Enrollment Deposit Level Details IGSAD058

Use this window to set up details for admission enrollment deposits.

This is required if you define program and program type deposit levels.

Prerequisites

Basic Program Details IGSPS013

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Types window

Select the Admission Enrollment Deposit Level Details tab

Click **Admission Enrollment Deposit Level Details**

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–48 Admission Enrollment Deposit Level Details

Field Name	Type	Features	Description
Admission Application Type	Display only		Admission application type code
Description	Display only		Admission application type description
Program Tab			
Program	Required	List of values	Oracle Student System program
Version Number	Display only		Version number populates when you enter program
Description	Display only		Description populates when you enter program
Inactive	Optional	Check box	If selected, indicates that the program is inactive for use with the Enrollment Deposit Level
Program Type Tab			
Program Type			Oracle Student System program type
Description	Display only		Description populates when you enter program type
Inactive	Optional	Check box	If selected, indicates that program type is inactive

10.10.2 Setting Up Application Fee Information IGSAD058

Use this procedure to set up institution-defined fee payment methods, fee status, and fee types.

At least one of the user-defined statuses of a particular system status must be selected as the system default. If application fee is not selected for the application, at least one defined fee can be associated with it. For example, if you define two statuses and map them to the same system status, at least one of them must be indicated as the system default.

For a particular system status, you cannot define more than one status as the system default .

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Setup Application > Application Fee Information window

Steps

- 1. In the Class field, select the appropriate condition
Depending on the criteria selected, the records displays either the fee payment methods, fee status, or fee types.
- 2. Enter data in each field of the Application Fee Information window as described in the table. Save your work.

Table 10–49 Application Fee Information Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Fee payment methods; for example fee status or fee types
Code Name	Required		Name of fee payment methods; for example fee status or fee types
Description	Required		Description of the fee payment methods; for example fee status or fee types
System Method	Required	List of values	System-defined system value
System Default	Optional	Check box	If selected, defaults fee payment methods; for example fee status or fee types
Closed	Optional	Check box	If selected, prevents further use of the record

10.10.3 Setting Up Admission Fee Statuses IGSAD006

Institution-defined codes for the status of an admission fee indicate the current state of the admission application fee for an applicant. Status codes might include Assessed, Exempt, Received, Pending, or Non-Applic.

The admission fee status procedure enables users to create institution-defined admission application fee codes.

Users can map institution-defined codes to system codes in a one-to-one relationship and use system codes for institution-defined codes wherever feasible.

Note: At least one institution-defined value must be mapped to each system-defined value. If more than one institution-defined status maps to a single system status, users must define one status as the system default.

When Student System automatically applies a particular institution-defined status to an admission application, the default is the one Student System applies.

Note: Default statuses cannot be deleted. There must be one institution-defined admission fee category, with the default indicator set mapped to each different system admission fee status.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Fee Statuses > Admission Fee Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–50 Admission Fee Status Window Description

Field Name	Type	Features	Description
Admission Fee Status	Required		Admission fee status code
Description	Required		Admission fee status description
System Admission Fee Status	Required		System-defined system admission fee status code
System Default	Optional	Check box	If selected, maps one institution-defined status to a single system status
Closed	Optional	Check box	If selected, prevents further use of the admission fee status code

10.11 Test Results

Test score records are maintained in the Admissions subsystem. Test scores are entered in the Admission Test Results window and multiple test score reports are stored in the Admission Test Summary window. The Admission Test Results window captures the import of each new test result, and the Admission Test Summary window stores the records of multiple test types, test dates, and test sources.

Student System enables users to manually enter test scores and import electronic test scores. User-defined test types collect converted scores or calculated scores and depend on user-defined procedures and user-supplied concordance tables.

10.11.1 Setting Up Admission Test Types IGSAD025

The admission test types procedure enables users to create user-defined admission test types that an applicant may be required to clear as one of the prerequisites for admission. Possible test types can be Scholastic Aptitude Tests, Test of English as a Foreign Language, Graduate Management Admission Test, and Graduate Record Examination.

These test types are used in recording test results.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Test Types > Admission Test Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–51 Admission Test Types Window Description

Field Name	Type	Features	Description
Admission Test Type	Required	List of values	Code of user-defined admission test type: GMAT, GRE, SAT
Description	Required		Description of user-defined admission test type
Tracking Step Code	Optional	List of values	Code of tracking step
Score Type	Required	List of values	Score type for defined admission test type: official, unofficial, self reported, other

Table 10–51 Admission Test Types Window Description

Field Name	Type	Features	Description
Closed	Optional	Check box	If selected, prevents further use of the test type
Create/Update Tracking Step		Button	Opens Tracking Step Catalog window for users to map new step code to system tracking step type and set validity period or modify existing details
Test Segments		Button	Opens Test Segments window

10.11.2 Setting Up Admission Test Segments

Applicants may be required to take admission tests, the results of which are considered while making an admission decision.

The Admission Test Segments window enables users to create various test segments for a test type and set a score range for each. For example, the test type Test of English as a Foreign Language may have the segments, Listening and Reading Comprehension, Vocabulary, Grammar, and Writing. In this window, users can also set various other details as mandatory. These details can include the capturing of irregularities, rank, and national scores.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Test Types > Admission Test Types window

Steps

1. Query the appropriate record.
2. Click **Test Segments**.

The Test Segments window appears.

3. Enter data in each field of the Test Segments window as described in the table.
Save your work.

Table 10–52 Test Segments Window Description

Field Name	Type	Features	Description
Admission Test Type	Default display only		code and description of user-defined admission test type for which user is to create segments
Segments Tab			
Segment Name	Required		code of segment for given test type
Description	Required		description of segment
Closed	Optional	Check box	if selected, prevents further use of record
Scores Tab			
Segment Name	Default display only		code for the segment of the test type in context
Score Min	Required		minimum value in the score range for a particular test segment; used to validate scores entered in Admission Test Results window
Score Max	Required		maximum value in the score range for a particular test segment; used to validate scores entered in Admission Test Results window
Composite Score	Optional	Check box	if selected, enables field in Admission Test Results window
Score	Optional	Check box	as for composite score
Percentile	Optional	Check box	as for composite score
Irregularity Code	Optional	Check box	as for composite score
Percentile Rank	Optional	Check box	as for composite score
Percentile National	Optional	Check box	as for composite score
Percentile State	Optional	Check box	as for composite score
Score Band Upper	Optional	Check box	as for composite score
Score Band Lower	Optional	Check box	as for composite score

10.11.3 Setting Up Admission Test Result Information IGSAD058

Use this procedure to set up levels of education, irregularities, grades, and score sources. Irregularities, for example, can be applicant arriving late for the test, late scores, applicant taking extra time to finish, or postponement of test date.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Test Result Information

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–53 Test Result Information Window Description

Field Name	Type	Features	Description
Class	Required	List of values	Class of test result information: educational level, irregularity code, test result grade and source
Code Name	Required		Code of user-defined test result detail in test result information class
Description	Required		Description of user-defined test result detail in test result information class
System Method			Not functional
System Default		Check box	Not functional
Closed	Optional	Check box	If selected, prevents further use of test result information detail

10.12 Application for Review

The admissions decision process consists of the following:

- creating application review profiles and review groups used to sort applications for evaluation
- assigning evaluators to review groups
- rating or evaluating applications against baseline criteria

- making decision based on application rating

User responsibilities for the admissions decision process include the following:

- creating and entering application outcome statuses
- creating and sending letters to applicants
- creating evaluator groups and entering evaluation information

For information on creating letters, see *Oracle CRM Foundation Implementation Guide*.

Users must set up evaluators, rating scales, application review profiles, and review groups as preliminary steps of making an admission decision. Then, applications are sorted into application review profiles and assigned review group codes. Users then assign evaluators to perform evaluation. Last, users determine an admission decision based on the evaluation.

10.12.1 Setting up Application Review Profiles IGSAD089

Users must set up evaluator person types and rating scales. To sort applications for evaluation, users must set up application review profiles and for each review profile, review groups. Users can then run the Assign Evaluators to Application Instances concurrent process to assign evaluators to applications.

Note: For easier maintenance of application review profiles, users should only establish application review profiles that are necessary to conduct reviews and evaluations.

To assign application instances for review, users first establish the method they wish to use to classify application instances into review groups as well as what methods will be used for conducting review and evaluation.

Each application instance can be assigned only one review group code which relates to only one application review profile.

Users can specify the following additional parameters or groupings for sorting of application instances in an application review profile before assigning review groups:

- Alphabetical by Surname
- Geographical by Applicant Address
- Geographical by Current Institution Address
- Geographical by Market Code
- Organizational Unit

- Program of Study

Note: Market Codes are defined for Institutions.

Prerequisites

Application Detail Codes > Rating Type Code Class IGSAD058

Rating Scales IGSAD059

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–54 Application Review Profile Window Description

Field Name	Type	Features	Description
Review Profile Name	Required		application review profile name used to sort applications for processing and review
Grouping	Required	List of values	application grouping for the profile: by surname, institution address, applicant address, market code, organization, program
Usage	Optional		address usage; enabled and required for applicant address and institution groupings
Evaluation Type	Required	drop-down list	defaults to Sequential; select Concurrent for random and simultaneous evaluation
Program Approval Required	Required	drop-down list	defaults to Yes; select No if approval not required
Effective Dates	Required	calendar	review profile validity period
Closed		Check box	if selected, prevents record from further use
Min Evaluator	Required		defaults to 1; user can set more than one evaluator for a profile and grouping
Max Evaluators	Optional		maximum number of evaluators

Table 10–54 Application Review Profile Window Description

Field Name	Type	Features	Description
Review Group		Button	opens the Review Group window for users to define groups for review, under the named application review profile
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Rating Scale region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Rating Type field in the Rating Scale region. Select to speed up performance when querying records.
Rating Scale Region			
Rating Type	Required	List of values	code of rating type or parameter against which applicant is rated
Description	Display only		rating type description: leadership, academics
Rating Scale	Required	List of values	code of rating scale used in reviewing applications
Description	Display only		rating scale description: numeric, alphabetical, qualitative

10.12.1.1 Setting Up Review Groups for a Review Profile

Once users have set up the way in which they want to sort applications for review, they must have a method of sorting the applications and routing the applications to the appropriate evaluators.

Review groups are assigned to application instances through the Assign Review Groups to Application Instances concurrent process.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile window

Steps

1. Query the appropriate review profile.
2. Click **Review Group**. The Review Group window appears.
3. Enter data in each field of the window as described in the table. Save your work.

Table 10–55 Review Group Window Description

Field Name	Type	Features	Description
Review Profile Name	Default display only		application review profile name
Grouping	Default display only		application review profile grouping type; surname, institution address, applicant address, market code, organization, program
Usage	Default display only		displays address usage for applicant address or institution grouping type
Group Definitions Region			
Group Code	Required		code of review group for profile and grouping
Group Name	Required		review group description
Surname Tab			
Include/Exclude	Required	drop-down list	select Include to include surnames in the range specified by start and end values; select Exclude to exclude surname range from the include range Note: Users can only exclude values from a set of included values.
Starting Value	Required		full or part surname to start range
Ending Value	Required		full or part surname to end range
Applicant Address Tab			
Country	Required	List of values	name of applicant's country
State Region			

Table 10–55 Review Group Window Description

Field Name	Type	Features	Description
Value	Optional	drop-down list	select Include to include states of the country in the range specified by start and end values; select Exclude to exclude state range from the include range Note: Users can only exclude values from a set of included values.
Starting Value			full or part name of state to start range; required if Include or Exclude selected
Ending Value			full or part state name to end range; required if starting value given
Postal Code Region			
Value	optional	drop-down list	select Include to include country postal codes in the range specified by start and end values; select Exclude to exclude postal code range from the include range Note: Users can only exclude values from a set of included values.
Starting Value			full or part postal code to start range; required if Include or Exclude selected
Ending Value			full or part postal code to end range; required if Starting Value given
Institution Address Tab			
Country	Required	List of values	institution's country name
State Region			
Value	optional	drop-down list	select Include to include states of the country in the range specified by start and end values; select Exclude to exclude state range from the include range Note: Users can only exclude values from a set of included values.
Starting Value			full or part name of state to start range; required if Include or Exclude selected
Ending Value			full or part state name to end range; required if Starting Value given
Postal Code Region			

Table 10–55 Review Group Window Description

Field Name	Type	Features	Description
Value	optional	drop-down list	select Include to include country postal codes in the range specified by start and end values; select Exclude to exclude postal code range from the include range Note: Users can only exclude values from a set of included values.
Starting Value			full or part postal code to start range; required if Include or Exclude selected
Ending Value			full or part postal code to end range; required if Starting Value given
Market Code Tab			
Value	Required	drop-down list	select Include to include market codes in the range specified by start and end values; select Exclude to exclude market code range from the include range Note: Users can only exclude values from a set of included values.
Starting Value	Required		full or part market code to start range
Ending Value	Required		full or part market code to end range
Organization Unit Tab			
Organization Code	Required	List of values	organization code
Organization Name	Display only		organization name
Program of Study Tab			
Program Code	Required	List of values	program code
Version Number	Required		program version number
Program Title	Required		program name

10.12.1.2 Assigning Evaluators to a Review Group

Evaluators and decision makers are defined by assigning a person type of evaluator to the person. Users can assign evaluators to application instances by running the

Assign Evaluators to Application Instances concurrent process or manually in the Ratings window accessed from the Applications window.

Assigning evaluators does not create restrictions as to which evaluator can retrieve a record or update a record with an admissions evaluation or decision.

Note: Assigning evaluators does not set up security roles or restrictions.

Users can assign evaluators using any of these methods:

- Assign Evaluators to Application Instances Concurrent Process
- Manually Enter Evaluators in the Evaluator Window

Assign Evaluators to Application Instances Concurrent Process

For application instances pending an outcome that have been assigned a review group but have not been assigned evaluators users can run the Assign Evaluators to Application Instances concurrent process to assign evaluators.

Manually Enter Evaluators in the Evaluator Window

Evaluators may also be manually assigned to a specific application instance in the Evaluation tab of the Ratings window.

Prerequisites

Person Types IGSPE004

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile window

Steps

1. Query the appropriate review profile.
2. Click **Review Group**. The Review Group window appears.
3. Query the appropriate review group. Click **Evaluator**. The Evaluator window appears.

4. Enter data in each field of the window as described in the table. Save your work.

Table 10–56 Evaluator Window Description

Field Name	Type	Features	Description
Review Profile Name	Default display only		review profile name
Grouping	Default display only		application grouping type
Usage	Default display only		address usage for applicant or institution address grouping
Review Group Code	Default display only		review group code and description
Evaluation Type	Default display only		sequential or concurrent evaluation If Sequential evaluation type selected, places evaluators in sequence entered.
Min Evaluator	Default display only		minimum number of evaluators
Max Evaluators	Default display only		maximum number of evaluators
Evaluators Region			
Sequence	default		default sequential numbering for Sequential Evaluation Type; default number 1 for Concurrent Evaluation Type
Person Number	Required	List of values	evaluator person number Note: Number of evaluators must equal stated minimum number and must not exceed stated maximum number. Evaluators must have email address.
Full Name	Display only		evaluator name
Program Approver		Check box	enabled if Program Approval Required was Yes; select to assign approving authority to any one evaluator

10.13 Import

Users can import the following data into Student System:

- person information for prospective students and applicants

- institutions
- applications
- test scores
- transcript information

Institutions may choose to import person and application information instead of manually entering these details. Person information can also be a useful tool for recruitment.

Institution information is often available in electronic form, and by importing this information, users do not have to manually enter it.

Users can gather much information about prospective students through the admission import process. Examples of the types of information collected includes:

- address information
- social security number
- sports activities
- high school graduation
- country of citizenship
- state of residence

Users can also gather information about institutions.

For more information about Admissions APIs, see *The OSS Interface User's Guide*.

10.13.1 Setting Up Source Categories IGSAD055

Source categories are logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. They are also used to build application types and to declare elements as mandatory.

Institutions may want to control how admission data for existing applicants is imported into Oracle Student System. For example, some sources of data may be very accurate and the institution can decide to always overwrite any existing values in the system.

The Source Categories window enables users to declare these type of rules for groups of attributes called source categories. The source types are created in the Source Type window.

The source categories procedure enables users to define attribute level discrepancy rule. Using this procedure, the categories and the elements within those categories to be included in the application type are marked. In addition, if certain categories or attributes are mandatory for an application type to be complete, this window is used.

Prerequisites

Source Types IGSPE026

Responsibility

Oracle Student System Super User

Navigation

Person Reference > Duplicate Management > Source Types window

Admission > Admission Setup > Setup Import Processes > Source Categories window

Steps

1. Query for an existing source.
2. In the US and elsewhere, users should set up the Include and Mandatory indicators for source categories in whatever configuration they need.

3. **UK Note:** For each of the application sources listed in the table include the categories listed selecting the Include and Mandatory check boxes and discrepancy rule as required.

Table 10–57 Application Sources

Source Type	System Source Type	Included Categories	Include	Mandatory
UCAS PER	PROSPECT_LIST	Person Details	Y	Y
		Address Details	Y	Y
		Statistics Details	Y	Y
		Person ID Types	Y	Y
		Person Contacts	Y	N
		International Details	Y	N
		Special Needs	Y	N
		Person Residency Details	Y	Y
UCAS APPL	APPLICATION	Application Details	Y	Y
		Person Details	Y	Y
		Address Details	Y	Y
		Statistics Details	Y	Y
		Person ID Types	Y	Y
		Person Contacts	Y	N

4. Save your work.
5. To set up source categories for data import, enter data in each field of the window as described in the table.
6. Save your work.

Table 10–58 Source Categories Window Description

Field Name	Type	Features	Description
Source Type	Required		User-defined source type
System Source Type		List of values	System-defined source types
Description	Required		Description of the source type

Table 10–58 Source Categories Window Description

Field Name	Type	Features	Description
Admission Category			Admission category Note: Admission category is a set of applicants whose applications will be processed through a common set of admission procedure steps.
Fee Type			Fee type Examples such as HECS, GSF, MEDIBANK. A fee type can be assigned as a fee liability of many fee categories.
Fee Calendar			Fee calendar
Person Region			
Inquiry Person Type	Display only		Inquiry person type
Inquiry Funnel Status	Display only		Person's inquiry funnel status
Inquiry Method	Display only		Person's inquiry method
Inquiry Entry Status	Display only		Person's required entry qualifications
Source Categories Region			
Category Name			Source category name
Detail Level		Check box	If selected, enables Detail Discrepancy Rules
Include	Optional	Check box	If selected, includes category name in the group
Mandatory		Check box	If selected,
Discrepancy Rule	Display only		Discrepancy rules attached to the source categories Note: If the Include check box is selected, a discrepancy rule must be selected.
Detail Discrepancy Rules		Button	Opens the Detail Discrepancy Rules window
Self Service Attributes		Button	Opens the Self Service Attributes window

10.14 Application Statuses

10.14.1 Setting Up Application Processing Statuses IGSAD005

Users define application processing statuses in this window to indicate the progress of admission application processing. Users can then map user-defined statuses to system-defined statuses and set the status at the beginning of application processing as system default.

Statuses can be Received, Completed, Incomplete, and Withdrawn. Based on application outcome, offer response, and request for reconsideration, values for application processing statuses are derived and displayed in the Applications window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Processing Statuses > Application Processing Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–59 Application Processing Statuses Window Description

Field Name	Type	Features	Description
Application Processing Status	Required		Code of user-defined application processing status: Complete, Received, Withdrawn
Description	Required		Description of user-defined application processing status
System Application Processing Status	Required	List of values	System-defined application processing status
System Default	Optional	Check box	If selected, sets the user-defined application processing status as default for an application
Closed	Optional	Check box	If selected, prevents further use of the application processing status

10.14.2 Setting Up Admission Entry Qualification Statuses IGSAD007

In this window users define admission entry qualification statuses. This determines if an application instance can be considered for admission. Possible statuses can be pending, qualified or not qualified.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Admission Entry Qualification Status > Admission Entry Qualification Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–60 Admission Entry Qualification Status Window Description

Field Name	Type	Features	Description
Admission Entry Qualification Status	Required		Admission entry qualification status
Description	Required		Admission entry qualification status description
System Admission Entry Qualification Status	Required		System admission entry qualification status code Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
System Default	Optional	Check box	If selected, indicates default code Note: One institution-defined admission entry qualification status with the default indicator set must be mapped to each different system admission entry qualification status.
Closed	Optional	Check box	If selected, prevents further use of the admission entry qualification status code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

10.14.3 Setting Up Admission Unit Outcome Statuses IGSAD008

The admission unit outcome status describes the progress of an applicant’s request for admission to a unit. Admission unit outcome status codes include Pending, Offer, and Rejected.

The admission unit outcome status procedure enables users to create an institution-defined code for each status.

Note: Once used in Student System, admission unit outcome status codes cannot be deleted. Minor modifications should be made to the codes. Selecting the Closed Check box prevents further use.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Unit Outcome Statuses > Admission Unit Outcome Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–61 Admission Unit Outcome Status Window Description

Field Name	Type	Features	Description
Admission Unit Outcome Status	Required		Admission unit outcome status
Description	Required		Admission unit outcome status description

Table 10–61 Admission Unit Outcome Status Window Description

Field Name	Type	Features	Description
System Admission Outcome Status	Required		System admission unit outcome status code Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
System Default	Optional	Check box	If selected, indicates default code Note: One institution-defined admission unit outcome status with the default indicator set must be mapped to each different system admission unit outcome status.
Closed	Optional	Check box	If selected, prevents further use of the admission unit outcome status code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

10.14.4 Setting Up Application Completion Statuses IGSAD009

Application completion statuses indicate if applicants have provided Required documentary evidence for the application.

In this window users define application completion statuses such as incomplete, satisfactory, unsatisfactory, rejected, and not applicable. Users must map these to system-defined completion statuses and define system default values.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Application Completion Statuses > Application Completion Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–62 Application Completion Statuses Window Description

Field Name	Type	Features	Description
Application Completion Status	Required		Code of user-defined application completion status: Denied, Incomplete, Non-applicable, Pending, Satisfied, Unsatisfied
Description	Required		Description of user-defined application completion status
System Application Completion Status	Required	List of values	System-defined application completion status
System Default	Optional	Check box	If selected, sets the user-defined application completion status as default for an application
Closed	Optional	Check box	If selected, prevents further use of the application completion status

10.14.5 Setting Up Admissions Outcome Statuses IGSAD010

Admission outcome status codes indicate the outcome of an application for admission. Status codes include Offer, Rejected, Application Suspended, and No-Quota.

The admission outcome status procedure enables users to create institution-defined admission outcome status codes.

Note: Once used in Student System, admission outcome status codes cannot be deleted. Minor modifications can be made to the codes. Selecting the Closed Check box prevents further use.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Outcome Statuses > Admission Outcome Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–63 Admission Outcome Status Window Description

Field Name	Type	Features	Description
Admission Outcome Status	Required		Admission outcome status
Description	Required		Admission outcome status description
System Admission Outcome Status	Required		System admission outcome status code Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
System Default	Optional	Check box	If selected, indicates default code Note: One institution-defined admission outcome status with the default indicator set must be mapped to each different system admission outcome status.
Closed	Optional	Check box	If selected, prevents further use of the admission outcome status code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

10.14.6 Setting Up Admissions Conditional Offer Statuses IGSAD011

Institution-defined codes indicate the status of an admission for which the admission offer is conditional on satisfying certain requirements. Codes include Satisfied, Unsatisfac, and Waived.

The admission conditional offer status procedure enables users to create institution-defined admission conditional offer status codes.

Note: Once used in Student System, admission conditional offer status codes cannot be deleted. Minor modifications can be made to the codes. Selecting the Closed Check box prevents further use of the admission conditional offer status code.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Conditional Offer Statuses > Admission Conditional Offer Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–64 Admission Conditional Offer Statuses Window Description

Field Name	Type	Features	Description
Admission Conditional Offer Status	Required		Admission conditional offer status Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
Description	Required		Admission conditional offer status description
System Admission Conditional Offer Status	Required		Institution-defined status to an admission application Note: Each institution-defined admission conditional offer status with the default indicator set must be mapped to a system admission conditional offer status.
System Default	Optional	Check box	If selected, indicates default code
Closed	Optional	Check box	If selected, prevents further use of the code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

Guidelines

The following are the system-defined conditional offer statuses, each of which should have at least one user-defined conditional offer status, which is selected as system default:

- No Conditions Attached To Offer
- Conditional Offer Outstanding
- Conditions Pertaining To Offer Satisfied
- Conditions Pertaining To Offer Not Satisfied

- Conditions Pertaining To Offer Waived

10.14.7 Setting Up Admission Offer Response Statuses IGSAD012

Admission offer response status code indicates the applicant's response to an offer. Status codes include Accepted, Deferral, and Rejected. Map each code to a system admission offer response status code. If more than one institution-defined status maps to a single system status, users must define one of them as the system default.

The admission offer response status procedure enables users to create institution-defined admission offer response status codes.

Note: The admission offer response status codes once used in Student System, cannot be deleted. Only minor modifications should be made to the codes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Offer Response Statuses > Admission Offer Response Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–65 Admission Offer Response Status Window Description

Field Name	Type	Features	Description
Admission Offer Response Status	Required		Admission offer response status
Description	Required		Admission offer response status description

Table 10–65 Admission Offer Response Status Window Description

Field Name	Type	Features	Description
System Admission Offer Response Status	Required		System admission offer response status code Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
System Default	Optional	Check box	If selected, indicates default code Note: One institution-defined admission offer response status with the default indicator set must be mapped to each different system admission offer response status.
Closed	Optional	Check box	If selected, prevents further use of the admission offer response status code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

10.14.8 Setting Up Admission Offer Deferment Statuses IGSAD013

Admission offer deferment status codes indicate the status of a request for a deferral. Codes include Approved, Rejected, or Withdrawn.

The admission offer deferment status procedure enables users to create institution-defined admission offer deferment status codes.

Note: Once used in Student System, admission offer deferment status codes cannot be deleted. Only minor description modifications can be made to the codes.

Map each code to a system admission offer deferment status. At least one institution-defined value must be mapped to each system-defined value. If more than one institution-defined status maps to a single system status, define one as the system default.

Note: When Student System automatically applies a particular institution-defined status to an admission deferment application, the default is the one Student System applies.

Prerequisites
None

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Offer Deferment Statuses > Admission Offer Deferment Status window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–66 Admission Offer Deferment Status Window Description

Field Name	Type	Features	Description
Admission Offer Deferment Status	Required		Admission offer deferment status
Description	Required		Admission offer deferment status description
System Admission Offer Deferment Status	Required		System admission offer deferment status code Note: Institution-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for institution-defined codes wherever feasible.
System Default	Optional	Check box	If selected, indicates default code Note: One institution-defined admission offer deferment status with the default indicator set must be mapped to each different system admission offer deferment status.
Closed	Optional	Check box	If selected, prevents further use of the admission offer deferment status code In order to create a new default value, create the new value before deleting the previous value. Note: A status cannot be closed, if it is the default.

10.15 Unit Placement

Institutions can recommend unit placement based on applicants' admission test results on standardized tests such as the Scholastic Aptitude Test (SAT) or Advanced Placement tests for specific subjects. Unit placement recommendations can be based on test types or test segments.

10.15.1 Setting Up Unit Placements IGSAD060

The Unit Placement window enables users to define units and for their placement, define a range of test scores at the test type and test segment level. Applicant test scores must be within the range to be considered eligible for placement of specified unit.

Prerequisites

Admission Test Types IGSAD025

Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Admission > Admission Setup > Setup Application > Unit Placement Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 10–67 Unit Placement Window Description

Field Name	Type	Features	Description
Unit Placement Level Region			
Test Types	Optional	Radio button	If selected, enables users to place units and enter a range of eligibility values for applicant scores at the test type level
Test Segments	Optional	Radio button	If selected, enables users to place units and enter a range of eligibility values for applicant scores at the test segment level
Test Types/Segments Region			
Test Type	Required	List of values	Test type code
Test Segment	Required	List of values	Test segment code for given test type; for example, for test type TOEFL, test segments can be Comprehension, Writing, Grammar

Table 10–67 Unit Placement Window Description

Field Name	Type	Features	Description
Test Segment Description	Display only		Description of test segment
Score	Required		Minimum and Maximum values to denote the range that determines placement in given units
Test Type Description	Display only		Description of test type
Unit Placements Region			
Unit Code	Required	List of values	Code of unit to be offered if applicant's scores in admission test is within given range
Version	Display only		Unit version
Unit Name	Display only		Unit name or description
Closed	Optional	Check box	If selected, prevents further use of unit

10.16 Admissions Profile Options

Set up the following Admissions profile options:

- IGS: Institution Grading Scale
- IGS: Pre-enrollment Year

Refer to Appendix A, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

10.17 HESA Reference Data

All institutions are required to set up the reference codes described in the following table:

Reference Codes for Admissions

Code	Description
OSS_OCC	OSS Occupation Code
OSS_SOC	OSS Social Class Indicator

Reference Codes for Admissions

Code	Description
OSS_DOM	OSS domicile
OSS_SPEC_STUD	OSS special student marker

See Define HESA Reference Codes in Chapter 22, "HESA" for information about using the Maintain Codes window.

10.18 Admissions Correspondence

Institutions must notify applicants of the results of their application instances. Users run concurrent processes to generate letters to be sent to applicants.

10.19 Admissions Rules

For Admissions Rules setup connected to an Admission Process Category (APC), navigate to:

Admission > Admission Setup > Setup Admission Process > Process Category Details

Query for the APC for which you plan to define a Rule. Once the APC is in context, click on either the Admission Processing Rules or the Post Admission Rules button. Each button ensures that the Rules defined on the following windows will be marked in the system as Admission Processing or Post Admission.

On the Admission Process Category Tracking Rules window, click the Add Rule button to create a new Rule. Click the Edit Rule button to edit an existing Rule.

On the Rule window, enter a Rule Description. In this example, the description for the Rule will be 'Application Date Rule'.

Rules can be entered manually in the Rule Text tab in the window, or Rules elements can be selected from a list of valid values displayed in the Rules Options region at the bottom of the window. Rules can also be entered using a combination of these methods.

As an example of Rules entry, the steps for creating an Admission Processing Rule that assigns requirements based on application date is below:

1. Select the Admission Processing Rules button on the Admission Process Category Details window. The Admission Process Category Tracking Rules window is returned.
2. Click the Add Rule button to create a new Rule. The Rule window is returned.
3. Enter a Rule Description in the top region of the window ('Application Date Rule').
4. Type 'IF' in the Rule Text tab. Click the Options/Validate button. The word 'IF' is validated as an operand, and the valid elements that can follow it in the rule are presented in the Rules Options region.
5. Click on the first record in the Rules Options region, and query for 'Application%'. The element 'Application - Date' is returned.
6. Click the Add Rule Text icon (a finger with a ribbon tied around it) to add the 'Application - Date' element to the statement in the Rule Text tab.
7. Click the Options/Validate button. Click the Add Rule Text icon next to the '=' element in the Rules Options region.
8. Click at the end of the statement in the Rule Text region. Enter a space and double quotes ("), then click the Options/Validate button. The double quotes appear in the Unprocessed field at the bottom of the Rule Text tab, because the syntax for the statement requires a single quote (').
9. Click at the end of the statement in the Rule Text region. Enter a space and a single quote ('), then click the Options/Validate button. The single quote is validated and the text Add a Valid Date is displayed in the Rules Options region.
10. Enter a date in the format DD/MM/YY format, e.g. 20/12/02, and another single quote. Click the Options/Validate button to ensure that the date is formatted correctly.
11. Click the Add Rule Text icon (a finger with a ribbon tied around it) next to the 'THEN' element to add THEN to the statement. Click at the end of the statement in the Rule Text region.
12. Enter a curled parenthesis (}) and click the Options/Validate button. The Rule Options region will display the Tracking Types that have been defined as Admission Processing or Post Admission Tracking Types. If necessary, click the Tracking Type button on the window to create a new Tracking Type.
13. Find or query for the Tracking Type to be used in the Rule. Click the Add Rule Text icon next to the Tracking Type to add it to the Rule statement. Click at the end of the statement and add a curled parenthesis. Click the Options/Validate button.

14. The Parse Successful message appears. Save the record and close the form.

The Rule statement outlined above would look like this when finished:

IF Application - Date = '20/12/02' THEN {SCLAWRD}

Another example of a Rule, this one based on the Admission Calendar, would look like this:

IF Admission Calendar Alternate Code = ADM SP 04 THEN {FINTRAN}

Other Rules can be based on the program indicated in the application, the value in the Special Group 1 or Special Group 2 field, and other application data. As long as the element is included in the Rules Options list, it can be used in a Rule.

Enrollments

11.1 Enrollments Overview

The Enrollments subsystem enters and maintains all details required for the management of student enrollment, pre-enrollment, and enrollment changes including the following items:

- configuring key date aliases for enrollment functionality
- creating and maintaining institution-defined and government-defined enrollment related reference data
- establishing an enrollment session, controlling access to enrollment functions, and setting up enrollment procedures
- identifying commencing and continuing students eligible to enroll
- entering and confirming enrollment information related to student program attempts, unit attempts, and unit set attempts
- managing existing program enrollments affected by changing student program offering options, intermission, program transfer, and holds
- managing unit discontinuation
- managing student load structure
- checking a student's program of study against program and unit rules
- producing reports

The Enrollments subsystem is closely integrated with the following subsystems:

- Admissions, in which offers of enrollment are entered and students are assigned enrollment, fee, and correspondence categories

- Student Finance, in which fees are calculated based on program, unit, and fee category data entered in the Enrollments subsystem
- Assessments, in which assessment items are maintained for student program and unit attempts
- Progression, in which failure to satisfy progression requirements, based on student unit attempts, can cause discontinuation of program attempts

The Enrollments subsystem enables users to manage all aspects of the Enrollments processes of an institution. Users can process preenrollment, enroll students, reenroll students, and enter enrollment changes.

After new students receive offers of admission to programs, the Preenrollment process transfers data created in the Admissions subsystem to the Enrollments subsystem.

Users enroll students in units and unit sections that are set up in the Program Structure and Planning subsystem. Users have the ability to override enrollments, enter program transfers, and enter and query enrollment information.

Enrollment categories enable users to define ways in which students can be enrolled in an institution. Enrollment categories are used both in the back office for the program attempt and the bulk jobs and in self service.

Self-service functionality is set up using forms in the back office. Users must make calendars available for self service enrollment, define self service user roles and configure other pieces of functionality, such as waitlists and timeslots.

Waitlist functionality enables students to be waitlisted in a unit section that has no available enrollment space. Waitlisting enables students who are on the waitlist to be moved to enrollment if one of the enrolled students drops the class or if the administrator increases enrollment limits in the back office.

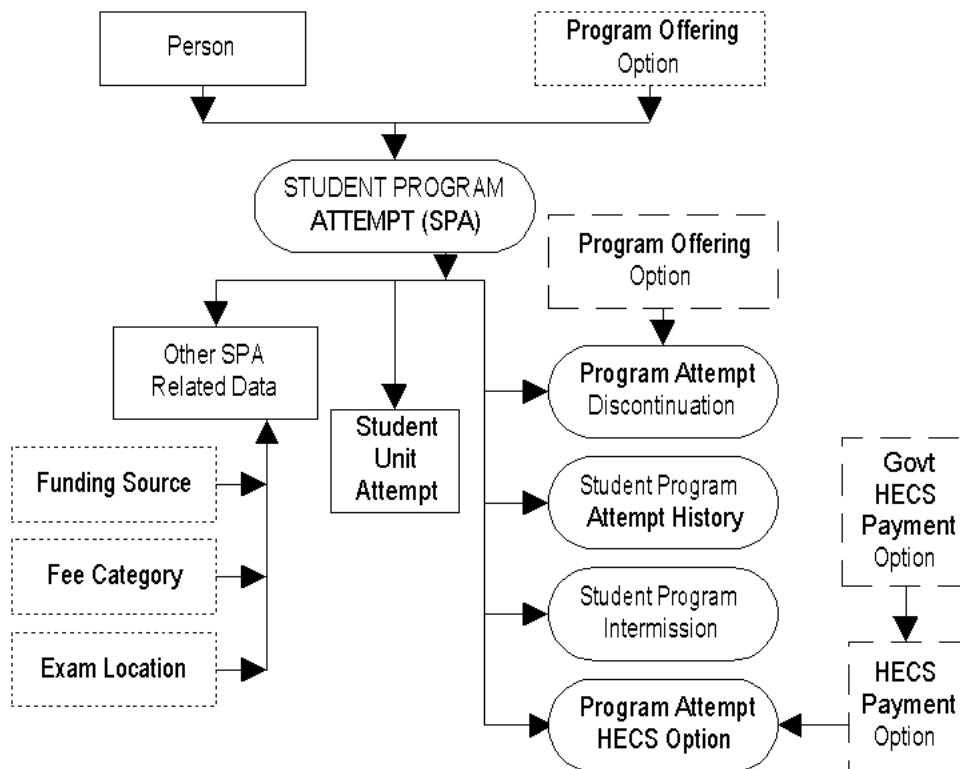
Enrollment timeslots are assigned to students in order for the institution to control the time periods during which enrollment is allowed. Timeslots allow higher priority students to enroll before lower priority students.

Student self service users can enroll themselves in unit sections for academic terms, and administrative self service users can enroll students in units and unit sections for academic terms.

Research candidates typically require special setup including calendar, milestones, theses supervisors, and scholarship details. Research candidates apply for admission into a research program and generally write a thesis.

Student Program Attempts

Figure 11-1 shows the main data relationships related to student program attempts. A student program attempt refers to the process of entering a program offering option for a student. Student program attempts are generally created through the admission process.

Figure 11–1 Student Program Attempt Data Relationships

Note: The direction of the arrow indicates that a value for the first item must be defined first in order to be used in the definition of the second item.

- Enrollment data
- Enrollment data detailed in other diagrams
- Data maintained in other subsystems
- Enrollment reference data

A student program attempt can store additional information about the program attempt in the Student Program Attempt window, or in other windows, accessed through the Student Enrollments window. Before entering additional information, predefined values must be entered in the system as reference data.

11.2 Enrollment Profile Options

Set up the following Enrollment profile options:

- IGS: Include Waitlist
- IGS: Waitlist Alotted with Time Conflict
- IGS: Unit Section Enrollment Method
- IGS: Validate Timeslots
- IGS: Display Dropped Unit Sections in the Schedule - Student
- IGS: Special Permissions Required to Update Credit Points and Grades
- IGS: Path of File where export data will be stored
- IGS: Display Dropped Unit Sections in the Schedule - Admin
- IGS: Audit Attempt Enrollment Credit Point

Refer to Appendix A, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

11.3 Government Contributions

11.3.1 Setting Up Government Contribution Payments IGSEN006

For enrollments in programs, government contribution payment option codes identify the exemption status for contribution-exempt students and the payment options for contribution-liable students. These codes are used in reporting to the government. Government contribution payment options are mapped to system or institution-defined contribution payment types that are used to determine the method of calculating contribution liabilities. The institution-defined values are entered for students at enrollment.

Some government contribution payment options can benefit from a discount under certain conditions. These conditions are indicated in the Government Contribution Payments window.

The following table shows some examples of government contribution payment options and the system contribution payment options wo which they are mapped.

Table 11-1 Mapping of Government Contribution Payment Options to System Contribution Payment Options Example

Government Contribution Payment Option	Description	System Contribution Payment Type	Allow Discount
10	Deferred Payment	DEFERRED	Yes
11	Up Front Payment > Discount	UPFRONT_D	Yes
12	Up Front Payment > No Discount or Safety Net	UPFRONT	
27	Fully Employer Funded	EXEMPT	

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Government Contribution Payments window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11-2 Government Contribution Payment Window Description

Field Name	Type	Features	Description
Government Contribution Payment Option	Required		Contribution payment option code Users are advised to modify a government contribution payment option only to correct an error in the data or to enter changes Required by the government. This is possible only if the record has not been used to define an institution-defined contribution payment option. If a government contribution payment option has been used to define an institution-defined contribution payment option, it cannot be deleted. To close a government contribution payment option and prevent further use, select the Closed check box.
Description	Required		Government contribution payment option description
System Contribution Payment Type	Required	List of values	System contribution payment type to which the government contribution payment option maps from the list of values
Closed	Optional	Check box	If selected, close government contribution payment option and prevents further use
Allow Discount	Optional	Check box	If selected, discounts can be taken into account in calculating expected payments in the Student Finance subsystem Discount details are set up in the Payment Schedules window.
Contribution Payment Options		Button	Opens contribution window

11.3.2 Setting Up Contribution Payment Options IGSEN007

The Contribution Payment window is used to enter and maintain the institution-defined set of contribution payment options. These are comparable to government contribution payment options, but they provide greater flexibility, with the ability to subdivide government codes and to use more meaningful codes. Institution-defined contribution payment options can be mapped to a government contribution payment option. Students in government reportable programs typically select a program attempt contribution payment option from the institution-defined set at enrollment. In some cases, such as reportable nonaward

programs, the appropriate contribution code is reported on the student’s behalf, without the need for students to indicate the appropriate payment option.

For example, meaningful values for contribution payment options, such as Deferred and Os-Fee, can be used and mapped to the government contribution payment options 10 - Deferred and 22 - Fee Paying Overseas Student, respectively.

Prerequisites

Government Contribution Payment IGSEN006

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Contribution Payments window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–3 Contribution Payment Window Description

Field Name	Type	Features	Description
Contribution Payment Option	Required		contribution payment option code Users are advised to modify a contribution payment option only to correct an error in the description. If a contribution payment option has been assigned to any student program attempt, it cannot be deleted.
Description	Required		contribution payment option description

Table 11-3 Contribution Payment Window Description

Field Name	Type	Features	Description
Government Contribution Payment Option	Optional	List of values	government contribution payment option to which the new payment option is mapped from the list of values
Closed	Optional	Check box	if selected, close a contribution payment option and prevents further use
Expire After Academic Period	Optional	Check box	<p>if selected, the contribution payment option automatically expires at the end of an academic period</p> <p>The Expire After Academic Period option is designed for cases where the student's continuing eligibility to receive the exemption is assessed periodically.</p>

11.4 Completion Dates

11.4.1 Setting Up Nominated Completion Periods IGSEN073

The nominated completion periods procedure enables users to nominate the anticipated year and period of program completion. Nominated completion period values are used by National Clearing House to derive completion dates for all the programs, to determine the anticipated graduation date. The nominate completion periods are also required for graduation process within Oracle Student System.

Nominated completion periods cannot be deleted. You must close the nominated completion period if you do not want to use it.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Nominated Completion Period > Nominated Completion Period window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–4 Nominated Completion Period Window Description

Field Name	Type	Features	Description
Completion Period	Required		Nominated completion period
Description	Required		Nominated completion period description
Closed	Optional	Check box	If selected, nominated completion period becomes invalid

11.5 Notes

11.5.1 Setting Up Enrollment Note Types IGSEN021

Details on student program attempts can be supplemented with notes in a variety of formats. The note types specified in the Enrollment Note Types window can be used to group these notes according to their purpose, characteristics, or other classification relevant to the institution.

For example, note types created specifically for the purpose of academic transcript notes must be mapped to the Acad-Rec system enrollment note type. The note types created in the Enrollment Note Types window are used in the Maintain Student Program Attempt Notes window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Enrollment Note Types > Enrollment Note Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–5 Enrollment Note Types Window Description

Field Name	Type	Features	Description
Enrollment Note Type	Required		Enrollment note type
Description	Required		Enrollment note type description
System Enrollment Note Type	Optional		System enrollment note type

11.6 Enrollment Categories

Enrollment categories enable users to define ways in which students can be enrolled in an institution.

Enrollment categories can be defined by subsystem specialists.

Several enrollment processes operate concurrently. Enrollment processes are created by selecting and sequencing a set of steps related to the student, the individual program attempt, and the units selected to study.

All possible steps in the process of entering a student's enrollment are available in the system for any type of enrollment. Since most enrollments do not require all steps, steps can be grouped together to form any number of enrollment category procedure details.

A student's enrollment information is primarily entered in the Student Enrollments window and through self service. The Student Enrollments window consists of windows that change appearance according to the enrollment category procedure detail being used.

Specifying a particular procedure detail defines the enrollment steps available to the user. If an enrollment step is available, the function is available for use. If the enrollment step is not specified, the function is not available.

Including a step in a procedure detail does not automatically give users the ability to invoke that step.

The ability to update data is controlled by roles assigned to users.

11.6.1 Setting Up Enrollment Method Types IGSEN015

Use this procedure to enter and maintain the institution-defined enrollment method types. The enrollment method types describe the different ways a student can enroll, for example through self service or through a face-to-face enrollment. Users can modify an enrollment method type to rectify a description error. Enrollment methods used to define an enrollment category procedure cannot be deleted.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Enrollment Method Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–6 Enrollment Method Types Window Description

Field Name	Type	Features	Description
Enrollment Method Type	Required		Enrollment method type; various ways of enrolling a student
Description	Required		Enrollment method type description
Self Service	Optional	Check box	The selected enrollment method is used as default method for self-service enrollment
Voice Response	Optional	Check box	If selected, indicates default method for voice response enrollment
Closed	Optional	Check box	If selected, prevents further use of the enrollment method type

11.6.2 Setting Up Enrollment Category Procedure Details IGSEN010

The Enrollment Category Procedure Details window is used primarily to govern the behavior of the Student Enrollment window including the buttons and functionality

available and associated with the program attempt. The window also allows users to associate Enrollment Categories, Methods, and Student Commencement Types.

The validations performed in self service for unit attempt enrollment are based on the validations assigned to these combinations of Enrollment Categories, Methods, and Student Commencement Types in the Enrollment Category Validation Setup window.

The Enrollment Category Procedure Details window can be used by institutions to query a set of existing enrollment categories and display the query results. Enrollment categories classify different methods and procedures involved in enrolling students. Enrollment categories are entered and maintained in the Enrollment Categories window.

The enrollment procedures associated with the displayed enrollment category are displayed or entered in the Enrollment Category Procedure Detail and Enrollment Category Procedure Step regions of the Enrollment Category Procedure Details window.

Users are advised to modify an enrollment category only to select or deselect the Person Add Allowed, Program Add Allowed, or Product Enrollment Package check box. An enrollment category procedure detail cannot be deleted if any enrollment category procedure steps are associated with it.

Enrollment Category Procedure Details

The Enrollment Category Procedure Detail region can be used by institutions to display and enter enrollment procedure details for the enrollment category displayed in the Enrollment Category field. A procedure detail is the combination of an enrollment method type with a student commencement type. Defining a procedure detail permits the steps involved in that procedure to be defined.

Enrollment method types are defined and maintained in the Enrollment Method Types window. They contribute to the content and layout of enrollment windows and the specification of enrollment packages.

Student commencement types are system-defined with the following values:

- New; enrolling for the first time in a program
- Continuing; reenrolling, or reconfirming, and indicating the intention to continue studying a program
- All; both new and continuing students

For example, an enrollment method type of Face2face can have more than one enrollment procedure associated with it, depending on the type of student

commencement. For example, the procedure to enroll a new student can be different than the procedure required to re-enroll a returning student. The two combinations Face2face/New and Face2face/Return constitute procedure details. For each procedure detail, the steps involved can be specified in the Enrollment Category Procedure Step region.

Enrollment Category Procedure Step

The Enrollment Category Procedure Step region can be used by institutions to enter and display the enrollment steps for the enrollment category and enrollment procedure displayed in the Enrollment Category field and the Enrollment Category Procedure Detail region.

An enrollment procedure step is a database task carried out during the process of entering a student’s enrollment. Entering an enrollment procedure involves allocating system-defined step types to a selected procedure detail and placing the steps in order of execution. Steps are grouped according to the type of enrollment information being dealt with, person, program, or unit steps. The steps are displayed in the Enrollment Category Procedure Details window in these groupings. These groups also determine the steps that appear as navigation buttons or as list items in the Student Enrollments window. For example, steps that belong to the Program group allow users to configure whether or not the Program Change button appears. If the Enrollment Category is not configured to allow the button to appear, the functionality is not available.

For example, international students that enroll in person might have the following enrollment category and step types:

- enrollment category Interntl
- enrollment method type Face2face
- student commencement type New

In this example, the Enrollment Category Procedure Step region contains the steps to be carried out on the system for new international students enrolling in person.

The table below lists the available enrollment procedure steps.

Table 11–7 Available Enrollment Procedure Steps

Person Steps	Program Steps
Addresses	Advanced Standing
Person Aliases	Program Discontinuation

Table 11–7 Available Enrollment Procedure Steps

Person Steps	Program Steps
Alternative Person Ids	Program Examination Location
Confirm/Alter Basic Person Details	Change to Program Offering Option of a Student Program Attempt
Check Holds on Person/Program	Expected Completion Period
Check Cross-Element Restrictions	Correspondence Category
Check Forced Program Offering Option Elements	Program Attempt Holds
Check Person-Level Timeslots	Program Attempt Notes
Program Attempt Screen	Drop All Unit Attempts
Special Needs Detail	Fee Exemptions
Financial Details	Fee Category
International Details	Funding Source
Person Holds	Intermission of Student Program Attempts
Student Notes	View/Alter Lapsed Dates
Override Variation Cut-Off Date	Pre-Enrollment Details
N/A	Publish Outcomes Indicator
N/A	Research Candidacy Details
N/A	Self Help Indicator
N/A	Special Requirements Details
N/A	Program Transfer
N/A	Program Unit Sets

Note: The unit steps currently do not have to be set up as the unit attempt enrollment is moved to self service and the unit steps on this window were used to configure the back office Unit Attempt window.

The procedure for setting up enrollment procedure details and steps is as follows:

1. Enter institution-defined enrollment categories in the Enrollment Categories window. Enrollment categories are used to define groups of students who pass through the same enrollment process.
2. Maintain enrollment category procedure details and steps using the Enrollment Category Procedure Details window.
3. Create an enrollment category procedure detail by assigning an enrollment method type and a student commencement type to an enrollment category. An enrollment method type is the method by which a student enrolls. Student commencement types include new, continuing, or all.
4. Select the required steps for the procedure detail from the set of all system-defined enrollment steps. The steps are assigned an order that determines the order of the corresponding buttons and T-list items as they appear in the windows accessed from the Student Enrollments window. Required steps can be flagged in the Student Enrollments window and will show up as bold button labels.

Prerequisites

Enrollment Categories IGSEN009

Enrollment Method Types IGSEN015

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Categories > Enrollment Category Procedure Details window

Steps

1. Query the appropriate record.
2. Enter data in each field of the window as described in the table.

3. Save your work.

Table 11–8 Enrollment Category Procedure Details Window Description

Field Name	Type	Features	Description
Enrollment Category	Display only		Enrollment category; a way for the institution to group students for enrollment purposes; students in the same category will be treated in the same way by the enrollment process. For example, users could define an Undergraduate and Graduate enrollment category
Description	Display only		Enrollment category description
Closed	Optional	Check box	If selected, prevents further use of the enrollment category
[Data Coordination Check Box]	Optional	Check box	If selected, data in Category Procedure Detail region is automatically refreshed and coordinated with data in the; if deselected, data in Category Procedure Detail is refreshed only when the user clicks in Enrollment Category Procedure Detail Region . Leave deselected to speed up performance when querying records.
Enrollment Category Procedure Details Region			
Enrollment Method Type	Required	List of values	Enrollment method; various ways of enrolling a student
Student Commencement Type	Required	List of values	Student commencement type Valid values include New, Continuing, and All. Use New for students enrolling for the first time in a program. Use Continuing for students reenrolling or continuing in a program. Use All for both new and continuing students.
Person Add Allowed	Optional	Check box	If selected, a person can be added using the enrollment forms rather than Admissions
Program Add Allowed	Optional	Check box	If selected, a program attempt can be added for a student even if the student does not have an offer of admission in the specific program
Produce Enrollment Package	Optional	Check box	If selected, produces an enrollment package during an enrollment session

Table 11–8 Enrollment Category Procedure Details Window Description

Field Name	Type	Features	Description
Enrollment Category Procedure Steps Region			
Show	Required	drop-down list	Shows drop-down list: Person Steps, Program Steps, and Unit Steps step group
Default Steps	Optional	Button	assigns Default steps to the procedure detail
Step Type	Required	List of values	Step type
Mandatory	Optional	Check box	If selected, indicates data entry is mandatory during the enrollment process
Step Order	Display only		order of the step

11.7 Enrollment in Program Attempts

11.7.1 Setting Up Intermission Types IGSEN068

The intermission types procedure enables users to define the intermission types. For example, intermission can be granted for study at another institution, for work-related reasons, and for study abroad.

Note: The census date is considered for validation for intermission periods.

Intermission types cannot be deleted. You must close the intermission type if you do not want to use it.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Intermission Types > Intermission Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–9 *Intermission Types Window Description*

Field Name	Type	Features	Description
Intermission Type	Required		Type of intermission
Description	Required		Description of intermission type
Approval Required		Check box	If selected, intermission details cannot be saved without an approver
Study at Another Institution		Check box	If selected, the other institution's details can be captured in the Intermission window
Closed		Check box	If selected, intermission is type is no longer available for selection

11.8 Enrollment Timeframes

11.8.1 Setting Up Enrollment Calendar Configuration IGSEN016

The Enrollment Calendar Configuration procedure enables users to define date aliases, which are used during Enrollments.

Enrollment calendars provide a framework for the preenrollment process. When a student program attempt is preenrolled, a student program attempt enrollment record is created, as viewed in the Program Attempt Administration window.

Enrollment calendars represent the institution's enrollment periods. Each enrollment period must be related to a superior academic period. It is recommended that each admission period have a subordinate enrollment period.

It is recommended that each admission period correspond to an enrollment period. For example, Admission Period 1, Beginning of Year Intake, and Admission Period 2, Mid-Year Intake, could have corresponding enrollment periods.

Various dates must be defined for enrollment and other processes to function.

Prerequisites

Census Date Alias IGSCA006

Start Date Alias IGSCA006

Start Cutoff Date Alias IGSCA006

Effective Enrollment Start Date Alias IGACA006

Load Effective Date Alias IGSCA006

Form Due Date Alias IGSCA006

Enrollment Cleanup Date Alias IGSCA006

Lapsed Date Alias IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Configure Enrollment Calendar > Enrollment Calendar Configuration window

Steps

1. Enter enrollment periods using the Calendar Types window. Enrollment periods should represent the institution's enrollment periods.
2. Relate each enrollment calendar to its superior academic calendar using the Calendar Instance Relationships window, accessed from the Calendar Types window.
3. Relate each enrollment calendar to its superior admission period using the Calendar Instance Relationships window.

This step can be performed during admission calendar setup.

4. Define the date aliases to be used for critical enrollment dates using the Enrollment Calendar Configuration window.
5. Using the Calendar Date Alias Instances window, accessed from the Calendar Types window, enter instances of the enrollment date aliases applicable to the calendar instance or alternatively, using the Date Alias Instances window, accessed from the Date Aliases window, enter instances of the enrollment date alias for the relevant calendars.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–10 Enrollment Calendar Configuration Window Description

Field Name	Type	Features	Description
Census	Required	List of values	Date alias representing the teaching period census
Program Completion Cutoff	Optional	List of values	Date alias used to determine when a program completion is considered as past program completion
Enrollment Calendar Configuration Date Alias Region			
Start	Required	List of values	<p>The date alias representing the default start date in an academic period calendar instance</p> <p>If a student confirms intention to commence a program before the start date alias instance, the program commencement is defaulted to the date alias instance. If the student confirms intention to commence a program after the commencement date alias, the program commencement defaults to the current date.</p> <p>Note: Only one start date alias can exist in each academic period calendar instance. The default date can be overridden.</p>
Start Cutoff	Required	List of values	Date alias within a teaching period, a student would no longer be considered starting their program; this alias is looked for in the student's first enrolled teaching period; the census date is used as this date alias
Record Open	Optional	List of values	Date the recording of unit enrollments opens in a teaching period calendar instance if combined with the Record Cutoff Date Alias, logical enrollment windows can be constructed.
Record Cutoff	Optional	List of values	Date recording of unit enrollments closes in a teaching period calendar instance

Table 11–10 Enrollment Calendar Configuration Window Description

Field Name	Type	Features	Description
Variation Cutoff	Optional	List of values	<p>Date alias used to prevent further enrollment variations in a teaching period</p> <p>Variations include drops and changes to grading schema or credit points</p> <p>Note: For the variation cutoff to be effective, date alias instances must be specified for each teaching period. If an instance is not specified for a particular teaching period, no restriction applies.</p>
Grading Schema	Optional	List of values	<p>Grading schema date alias</p> <p>When defining a date alias for the Grading Schema column, the date alias should be associated with a Teaching Calendar in the Calendar Category column.</p>
Sub unit	Optional	List of values	<p>Subunit date alias; this date is required to establish relationships between teaching calendar instances</p> <p>Note: The subunits must be enrolled in teaching calendar instances and the teaching calendar instance must enroll the superior unit. To be linked, all sub-units must be enrolled in teaching periods that contain the nominated date alias. Teaching periods must fall within the start and end dates of the teaching period that enrolls the superior unit. If a sub-unit date alias is not specified, the superior unit and its sub-unit must be enrolled in the same teaching period.</p>
Effective Enrollment Start	Required	List of values	<p>Enrollment effective start date for an academic period</p> <p>Note: This date represents the time the processes must consider the related academic period as the current period.</p> <p>For example, for enrollment purposes sometime in October/November would be the beginning of the following year's cycle making that instance the effective current instance.</p>

Table 11–10 Enrollment Calendar Configuration Window Description

Field Name	Type	Features	Description
Load Effective	Required	List of values	<p>The date alias that is used to determine which is the current load calendar for purposes of point-in-time load and attendance type calculations.</p> <p>These processes look for the most recently occurred instance of this date alias and use the load calendar in which it exists as the basis for the derivation of attendance type and load. Instances in calendars other than load have no effect.</p> <p>Only load calendars subordinate to enrollment periods linked to the academic period in which a program attempt is enrolled are considered by these processes. These should not have been linked to the enrollment period</p>
Package Production	Optional	List of values	Date alias that describes a default enrollment package production date
Form Due	Required	List of values	<p>Default enrollment due date</p> <p>Note: The default is only used by a process that produces enrollment forms if a specific due date is not specified.</p>
Enrolled Rule Cutoff	Optional	List of values	<p>Enrolled rule date cutoff alias</p> <p>Note: This date alias represents the last date when unit attempts can be changed from INVALID to ENROLLED as a result of passing a previously failed rule.</p>

Table 11–10 Enrollment Calendar Configuration Window Description

Field Name	Type	Features	Description
Invalid Rule Cutoff	Optional	List of values	Represents the last date on which unit attempts can be switched from ENROLLED to INVALID as a result of failing a unit rule check
Enrollment Cleanup	Required	List of values	The date alias when the unconfirmed student program attempts is cleaned up within an enrollment period Note: The Clean-up Unconfirmed Student Course Attempt concurrent process deletes unconfirmed student program attempts that were created through pre enrollment of an admission application in admission periods that are superiors of the specified enrollment period.
Lapsed	Required	List of values	The date alias representing the last date in an academic period that an INACTIVE student program attempt is automatically set to LAPSED Note: The Student Program Attempt Lapse concurrent process lapses the INACTIVE student program attempts.

Guidelines

When an institution places a hold with the system hold effect type of Deny All Enrollment Activity against a student, the student is prevented from enrolling in unit attempts.

To ensure that the hold takes effect, users must ensure that a date alias for the CENSUS date in the Enrollment Calendar Configuration window is set up. The Census date can be associated with either teaching or load calendars. To ensure that the hold takes effect, a census date must be associated with the load calendar.

If the hold is placed against the student and the sysdate is less than the value of the Census date alias for the load calendar, then the hold will be enforced against the student.

11.8.2 Setting Up Non-Standard Unit Section Enrollment Deadlines IGSEN053

The non-standard unit section enrollment deadline setup procedure enables users to define the formula to be used to calculate enrollment deadline setup date. Based on the offset date the enrollment deadline setup date is calculated.

A non-standard unit section is one that is of shorter duration than the teaching period in which it occurs. For these unit sections, the standard enrollment deadline may not apply, and a different enrollment deadline can be calculated.

Enrollment Deadline Offset Constraints

The enrollment date offset deadline constraints procedure enables users to create deadline date offset constraints, modify, or delete the existing deadline date offset constraints. Based on the offset date the enrollment deadline setup date is calculated.

To create discontinuation date offset deadline constraints, users must define system date offset constraint type, must condition or must not condition, and resolution days. Users can query the deadline date offset constraints for a function and an offset date. For example, if the system date offset constraint type is defined as Monday, indicates that the offset date falls on Monday. If the condition is Must, the number given as the resolution days number decides the offset date.

Prerequisites

Organization Structure Data Setup IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Non-Standard Unit Section Enrollment Deadline Setup > Non-Standard Unit Section Enrollment Deadline Setup window

Steps

1. Enter data in each field of the as described in the table.
2. Save your work
3. Query the appropriate record.
4. Click **Offset Constraints**.

The Enrollment Deadline Date Offset Constraints window appears.

5. Enter data in each field of the window as described in the table.
6. Save your work.

7. Click **Back** to close the window..

Table 11–11 Non-Standard Unit Section Enrollment Deadline Setup Window Description

Field Name	Type	Features	Description
Function	Required	List of values	Function to create a modified deadline
Definition Level	Required	List of values	Institution or organizational unit
Organizational Unit	Optional	List of values	Users must select Organizational Unit, if organizational unit is selected in Definition Level field. Note: value is displayed only if Definition Level is equal to Organizational Unit
Formula Method Region			
[Formula Method]	Default	Radio button	Formula method: duration days or meeting days. The formula method determines the type of calculation performed on the Unit Section Details window for non-standard unit sections.
Round Method Region			
[Round Method]	Default	Radio button	Rounding method: Standard Round or Always Round Up Select Standard Round to round to the nearest number. For example, 35.43 = 35. Select Always Round Up to round to the next round number. For example, 35.4 = 36.
Offset Date	Required	List of values	Offset date
Offset Duration	Required		Offset duration; percentage
Offset Constraints	Optional	Button	Opens enrollment deadline date offset constraints Enrollment Deadline Date Offset Constraint window

Table 11–12 Enrollment Deadline Date Offset Constraints Window Description

Field Name	Type	Features	Description
Function	Default display only		Function
Offset Date	Default display only		Offset date
Deadline Date Offset Constraints Region			
System Date Offset Constraint Type	Required	List of values	System date offset constraint type
Condition	Required	List of values	Condition: Must, Must Not
Resolution days	Required	List of values	Resolution days
Back		Button	Returns to Non-Standard Unit Section Enrollment Deadline Setup window

11.8.3 Setting Up Administrative Unit Statuses IGSEN001

Administrative unit statuses are used to associate unit attempt statuses such as dropped and discontinued. The administrative unit statuses can also have a grade associated with them.

Administrative unit statuses (AUS) map to unit attempt statuses. A unit attempt status defines the state of activity of a student's unit attempt and is system-defined. Administrative unit statuses provide a means to describe, for discontinued unit attempt statuses, the possible outcomes relating to a state of activity.

The Administrative Unit Statuses window is used to enter and maintain the set of institution-defined administrative unit statuses that can be assigned when a unit attempt has the status Discontin. The process of associating an administrative unit status with a discontinued student unit attempt is automated through date triggers or unit discontinuation date criteria that determine the appropriate administrative unit status to assign. The relationship between these date triggers and administrative unit statuses are maintained using the Unit Discontinuation Dates window.

Administrative unit statuses are also used by load calendars to determine the load incurred by discontinued student unit attempts. See the Load Calendar Structure window.

For example, a unit attempt status of Discontin describes the state of activity of a student's unit attempt but does not describe the consequences of the discontinuation.

Administrative unit statuses are used to add this detail to the event by subdividing the status for Discontin as shown in the table.

Table 11–13 Administrative Unit Status Example

Administrative Unit Status	Description	Unit Attempt Status
WD-EARLY	Withdrawn Early	DISCONTIN
WD-LATE	Withdrawn Late > No Penalty	DISCONTIN
WD-FAIL	Withdrawn Late With Penalty	DISCONTIN

Administrative Unit Status Grade

A grade must be associated with an administrative unit status whose corresponding unit attempt status is Discontin. This enables the automatic application of an appropriate grade to a discontinued student unit attempt.

For example, an administrative unit status of Wd-Fail > Withdrawn Late With Penalty can result in a Fail grade. When this grade is entered against the administrative unit status, the Fail grade is reported for student unit attempts from which a student has withdrawn after the specified cutoff date is reported in official notifications.

The table below describes administrative unit status grade examples.

Table 11–14 Administrative Unit Status Grade Example

Administrative Unit Status	Unit Attempt Status	Grade
WD-LATE	DISCONTIN	WL
WD-FAIL	DISCONTIN	Fail

Administrative unit statuses cannot be deleted. You must close the administrative unit status if you do not want to use it.

Prerequisites

Grading Schema Code IGSAS025

Responsibility

Oracle Student System

Navigation

Enrollments > Setup > Administrative Unit Statuses > Administrative Unit Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–15 Administrative Unit Statuses Window Description

Field Name	Type	Features	Description
Administrative Unit Status	Required		Institution-defined administrative statuses applicable to a discontinued student unit attempt such as Withdrawn Early and Withdrawn Late > Fail, used to determine
Description	Required		Administrative unit status description
Unit Attempt Status	Required	List of values	System-defined status of a unit attempt; select the Discontin unit attempt status from the List of values, or enter Discontin
Closed	Optional	Check box	If selected, closes an administrative unit status and make it unavailable for further use
Show on Official Notification	Optional	Check box	If selected, the status will be included on official notifications
Effectively Enrolled For Progression	Optional	Check box	If selected, discontinued units with this administrative unit status are included in program progression checks and grade point average calculations Note: If the check box is deselected, the unit is treated as not being enrolled. By Default, the Effectively Enrolled for Progression check box is selected.
Effective Lapsed Time for Progression	Optional	Check box	If selected, the discontinued units with this administrative unit status are counted as an effective enrollment period for progression time elapsed calculations Note: If the check box is deselected, the unit is not counted for elapsed time calculations. By Default, the Effective Lapsed Time for Progression check box is selected.
Administrative Unit Status Grade Region			

Table 11–15 Administrative Unit Statuses Window Description

Field Name	Type	Features	Description
Data Coordination Check Box	Optional	Check box	If selected, data in the Administrative Unit Status Grade region is automatically refreshed and coordinated with data in the header region; if deselected, data in the Administrative Unit Status Grade region is refreshed only when the user navigates to the Grading Schema Code field in the Administrative Unit Status Grade region; leave deselected to speed up performance when querying records.
Grading Schema Code	Required	List of values	grading schema code Note: Only one grade from the current grading schema can be added A grade cannot be modified once it has been saved. It is necessary to delete the grade and enter a new grade. This is only recommended when it is necessary to correct errors in the data. Users are advised to delete a grade only if the grade was incorrectly assigned and has not been used elsewhere in the system.
Version	Display only		system-generated number that identifies a version of grading schema
Grade	Display only		Indicates student's level of achievement in a unit attempt; assessment outcome; assessment result; code representing a student; s level of achievement that must be mapped to a system result type
Full Grade Name	Display only		Full grade name
Result	Display only		Result

11.8.4 Setting Up Unit Discontinuation Date Criteria IGSEN008

In the calendar subsystem, a set of date aliases that relate to discontinuation of a student unit attempt are established within each teaching period.

The unit discontinuation date criteria procedure links critical dates or date aliases to administrative unit statuses to facilitate unit discontinuation management.

In the Unit Discontinuation Dates window, these date aliases are linked to a Drop check box or to an administrative unit status.

Users typically modify a unit discontinuation date criteria record only if needed to correct an error in the data. Once a unit discontinuation date criteria record is used, changes to these records or deleting the records alters the interpretation of information that exists in student records.

Process

Within a relevant teaching period, the system finds the most recent instance of a discontinuation date alias prior to the effective date of discontinuation.

- If the Drop check box is selected for this date alias, the student's unit attempt is saved with the status of Dropped in the database.
- If the DISCONTINUE check box is deselected for this date alias, the administrative unit status linked with this date alias is automatically entered against the unit attempt and triggers particular processing, for example, whether load is incurred, or whether the attempt appears on official notifications. This processing is specified in the Load Calendar Structure window and the Administrative Unit Statuses window.
- There is one exception. The automatic entry of administrative unit statuses depends on linkages marked as defaults. Different date aliases can be assigned instances with the same date. It is therefore possible that more than one administrative unit status is linked to a particular date. In this situation, and if no default is set, the user must select between possible statuses when discontinuing the unit attempt in the Student Enrollments window. If one of the linkages is specified as the default, it is applied automatically, but can be overridden.

Example

Date aliases early in the teaching period usually have the Drop check box selected. Later date aliases might be linked to an administrative unit status such as Wd-Late or Wd-Fail.

The following table provides an example of some possible linkages using the Unit Discontinuation Dates window.

Table 11–16 Date Alias Link to Administrative Unit Status Examples

Date Alias	Description	Administrative Unit Status	Drop
UNIT-DROP	Withdrawn unit dropped	N/A	Yes
WDN-EARLY	Early unit withdrawal	WD-EARLY	N/A

Table 11–16 Date Alias Link to Administrative Unit Status Examples

Date Alias	Description	Administrative Unit Status	Drop
WDN-LATE	Late unit withdrawal without fail grade	WD-LATE	N/A
WDN-FAIL	Late unit withdrawal > fail	WD-FAIL	N/A

The following table demonstrates potential effects of these linkages when a student's unit attempt is discontinued in a particular teaching period.

Table 11–17 Effect of Date Alias Link to Administrative Unit Status Example

Discontinuation Date of Unit Attempt	Instance of Date Alias in Semester 1, 2002	Effect	Explanation
28/FEB/2002	UNIT-DROP 1/JAN/2002	Unit attempt dropped	1/JAN/2002 is the most recent instance of a date alias before 28/FEB/2002. The Drop check box has been set for UNIT-DROP, so any unit attempts that are discontinued between 1/JAN/2002 and 1/MAR/2002 inclusive are saved with status Dropped in the database.
6/MAR/2002 16/MAR/2002 30/MAR/2002	WDN-EARLY 2/MAR/2002	WD-EARLY entered against these three unit attempts	The administrative unit status WD-EARLY is in effect for all dates from the date alias instance of WDN-EARLY until WDN-LATE becomes effective on 31/MAR/2002. Therefore, actions associated with WD-EARLY apply to unit attempts discontinued in this period.
31/MAR/2002	WDN-LATE 31/MAR/2002	WD-LATE entered against unit attempt	The unit has been discontinued as of the day on which WDN-LATE falls and receives the administrative unit status WD-LATE.

Table 11–17 Effect of Date Alias Link to Administrative Unit Status Example

Discontinuation Date of Unit Attempt	Instance of Date Alias in Semester 1, 2002	Effect	Explanation
9/JUN/2002	WDN-FAIL 8/JUN/2002	WD-FAIL status entered against the unit attempt with an associated fail grade	Grades must be associated with all discontinuation administrative unit statuses.

Prerequisites

Date Aliases IGSCA006

Administrative Unit Statuses IGSEN001

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Unit Discontinuation Dates > Unit Discontinuation Dates window

Steps

Enter data in each field of the Unit Discontinuation Dates window as described in the table. Save your work.

Table 11–18 Unit Discontinuation Dates Window Description

Field Name	Type	Features	Description
Date Alias	Required	List of values	Discontinuation date alias Note: Processes linked to a particular date alias apply from the date that the date alias occurs in the teaching period, up to and including the day before the next instance becomes effective.
Description	Display only		Discontinuation date alias description

Table 11–18 Unit Discontinuation Dates Window Description

Field Name	Type	Features	Description
Administrative Unit Status	Optional	List of values	Institution-defined administrative statuses applicable to a discontinued student unit attempt, as Withdrawn Early and Withdrawn Late; used to determine load, progression, and grades
Drop	Optional	Check box	If selected, student unit attempts that are discontinued during the effective period of the associated date alias are saved with the status Dropped in the database
Default	Optional	Check box	If selected, a link between a date alias and an administrative unit status causes the appropriate status to be entered automatically when a unit attempt is discontinued

11.8.5 Setting Up Non-Standard Unit Section Discontinuation Deadlines IGSEN054

The non-standard unit section discontinuation deadline setup procedure enables users to define the formula to be used to calculate discontinuation deadline setup date. Because a non-standard unit section does not have the same duration as the teaching period, users may wish to calculate a different discontinuation date. Based on the offset date the enrollment deadline setup date is calculated.

Prerequisites

Unit Statuses IGSEN001

Organizational Unit IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Non-Standard Unit Discontinuation Setup > Non-Standard Unit Section Discontinuation Setup window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–19 Non-Standard Unit Section Discontinuation Setup Window Description

Field Name	Type	Features	Description
Administrative Unit Status	Required	List of values	Institution-defined administrative statuses applicable to a discontinued student unit attempt, as Withdrawn Early and Withdrawn Late; used to determine load, progression, and grades description
Description	Display only		Administrative unit status description
Definition Level	Required	List of values	Institution or organizational unit
Organizational Unit	Optional	List of values	Users must select Organizational Unit; if organizational unit is selected in Definition Level field Note: Value is displayed only if the Definition Level Organizational Unit
Formula Method Region			
[Formula Method]	Default	Radio button	Formula method: duration days or meeting days. The formula method determines the type of calculation performed on the Unit Section Details window for non-standard unit sections.
Round Method Region			
[Round Method]	Default	Radio button	Rounding method: Standard Round or Always Round Up Select Standard Round to round to the nearest number. For example, 35.43 = 35. Select Always Round Up to round to the next round number. For example, 35.4 = 36.
Offset Date	Required	List of values	Offset date
Offset Duration	Required		Offset duration; percentage
Offset Constraints	Optional	Button	Opens Discontinuation Deadline Date Offset Constraints window

11.8.6 Setting Up Discontinuation Deadline Date Offset Constraints IGSEN056

The discontinuation date offset deadline constraints procedure enables users to create new deadline date offset constraints and modify and delete the existing deadline date offset constraints. Based on the offset date the discontinuation deadline setup date is calculated.

To create discontinuation date offset deadline constraints, users must define system date offset constraint type, must condition or must not condition, and resolution days. Users can query the deadline date offset constraints for an administrative unit status and an offset date. For example, if the system date offset constraint type is defined as Monday, indicates that the offset date falls on Monday. If the condition is Must, the number given as the resolution days number decides the offset date.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Non-Standard Unit Section Discontinuation Deadline Setup
> Non-Standard Unit Section Discontinuation Deadline Setup window

Steps

1. Query the appropriate record.
2. Click **Offset Constraints**.

The Discontinuation Deadline Date Offset Constraints window appears.

3. Enter data in each field of the window as described in the table.
4. Save your work.

5. Click **Back** to close the window.

Table 11–20 Discontinuation Deadline Date Offset Constraints Window Description

Field Name	Type	Features	Description
Administrative Unit Status	Default display only		Institution-defined administrative statuses applicable to a discontinued student unit attempt, as Withdrawn Early and Withdrawn Late; used to determine load, progression, and grades description
Description	Default display only		Administrative unit status description
Offset Date	Default display only		Offset date
Deadline Date Offset Constraints Region			
System Date Offset Constraint Type	Required	List of values	System date offset constraint type
Condition	Required	List of values	Condition: Must, Must Not
Resolution days	Required	List of values	Resolution days
Back	Required	Button	Returns to Non-Standard Unit Section Discontinuation Deadline Setup window

11.8.7 Setting Up Discontinuation Reason Codes IGSEN017

Institutions use the Discontinuation Reasons window to enter and maintain code reasons for discontinuation, applicable to units, programs, or both. These codes and reasons are determined by the institution and appear in the Student Enrollments window and in Self Service Discontinuation reason codes are applied when a student's enrollment is terminated at the program or unit level before completion. Discontinuation reasons may be voluntary or system-initiated.

- voluntary discontinuation; why a student has voluntarily discontinued a particular program attempt or unit attempt
- system-initiated discontinuation; why a student program attempt has been discontinued as part of a system process

For voluntary discontinuation, users must specify required reasons and select one of them as the default.

For system-initiated program discontinuation, the reasons must be assigned either of the following system discontinuation reason types.

- Terminated: no system functionality
- Transfer: the reasons assigned to the type relate to the program transfer process

At least one institution-defined transfer reason must be entered in the Discontinuation Reasons window, and more can be specified. Only one reason must be indicated as the system default. This default is automatically inserted whenever a program is discontinued as part of the transfer process, but the value can be amended in the Student Enrollments window if another transfer reason is more appropriate.

The following table describes examples of discontinuation reason codes.

Table 11–21 Discontinuation Reason Codes Example

Code	Description	Default	System Discontinuation Reason Type	System Default
0	Unspecified discontinuation reason	X	N/A	N/A
25	Relocation	N/A	N/A	N/A
MEDICAL	Withdrew for medical reasons	N/A	N/A	N/A
98	Discontinued through program transfer	N/A	TRANSFER	X
99	Transfer discontinuation reversal	N/A	TRANSFER	N/A

Discontinuation reasons cannot be deleted. You must close the discontinuation reason if you do not want to use it.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Discontinuation Reasons > Discontinuation Reasons window

Steps

Enter data in each field of the window as described in the table. Save your work.

UK: Define discontinuation reasons that are mapped to the HESA reason for leaving codes.

Table 11–22 Discontinuation Reasons Window Description

Field Name	Type	Features	Description
Discontinuation Reasons Code	Required		New discontinuation reason code Note: If a particular discontinuation reason code is used in a student enrollment, it cannot be deleted.
Description	Display only		Discontinuation reason code description
Unit	Optional	Check box	Unit
Program	Optional	Check box	Program
Default	Optional	Check box	If selected, means discontinuation reason code is the default for a voluntary discontinuation reason
Closed	Optional	Check box	If selected, prevents further used of the discontinuation reason code Note: As a particular discontinuation reason code used in enrollment cannot be deleted, this Check box can be selected to prevent the further use of the reason code
System Discontinuation Reason Type	Optional	List of values	Discontinuation reason code for a reason related to a system-initiated program discontinuation
System Default		Check box	If selected, system discontinuation reason type is assigned Note: One record must be selected as the default for each set of system discontinuation reason types.
Comments	Optional		Description of system discontinuation reason type

11.8.8 Setting Up Enrollment Deadline Calculations IGSPS101

The Enrollment Deadline Calculations procedure enables users to setup, calculate, and modify the variation cutoff, record cutoff, grading schema, and discontinuation deadline dates for a unit section.

It also calculates discontinuation deadline dates for the administrative unit status with unit status DISCONTIN. The cutoff dates specified in the Enrollment Category Configuration window apply unless an override date is specified at the unit section level.

The override value can either be calculated using the method described here or can be manually entered. Users can override these existing deadline dates and these dates takes priority over the date aliases entered in the Enrollment Calendar Configuration window.

Using the offset constraints enables users to take advantage of functionality that will calculate the new deadline while taking into account different factors. For example, users can specify that the date determined does not fall on a Sunday. Using the offset constraints is optional.

Prerequisites

Basic Unit Details IGSPS047

Unit Offerings IGSPS066

Unit Sections IGSPS058

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning- Unit Section > Unit Section Details window

Steps

1. Query the appropriate record.

The Unit Section Details window appears.

2. Click Enrollment Deadlines.

The Enrollment Deadline Calculations window appears.

3. Enter data in each field of the window as described in the table. Save your work.

Table 11–23 Enrollment Deadline Calculations Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Display only		Code that identifies a unit
Version	Display only		System generated number that identifies a version of the unit
Title	Display only		Unit title
Location	Display only		Campus, study center, or a place the institution conducts business or holds classes
Class	Display only		Unit class
Mode	Display only		Method of attending the classes. For example, on-campus or off-campus.
Teaching Period Region			
Call Number	Display only		Unique identified that an institution might use to represent a unit section in a term
Calendar Type	Display only		Institution-defined name given to all calendars of a similar classification
Alternate Code	Display only		Code identifying the calendar type in order to simplify data entry
Effective Dates	Display only		Actual start and end date of the teaching period
Unit Section Dates	Display only		Start and end date of the unit
Enrollment Deadline Dates Region			
Variation Cutoff Tab			
Definition Level	Display only		Institution or an organizational unit
Organizational Unit	Display only		Business unit of an institution or an organization, including faculty
Formula Method	Display only		Determines the type of calculation performed on the Unit Section Details window for non-standard unit sections; the formula methods are duration days and meeting days

Table 11–23 Enrollment Deadline Calculations Window Description

Field Name	Type	Features	Description
Round Method	Display only		Standard round and always round up
Offset Date	Display only		Deadline date + offset constraints
Offset Duration	Display only		Deadline date > offset constraints
Meeting Days/Duration Days	Display only		Number of meeting or duration days
Offset Days	Display only		Offset days in percentage
Deadline Date	Conditionally Required	Calendar	Deadline date for variation cutoff, record cutoff, and grading schema
Calculate		Button	Calculates the deadline date Note: Users must click this button, if offset constraint is set
Offset Constraints		Button	Opens Enrollment Deadline Date offset constraints window
Record Cutoff Tab			
Definition Level	Display only		Institution or organizational unit
Organizational Unit	Display only		Business unit of an institution or an organization, including faculty
Formula Method	Display only		Determines the type of calculation performed on the Unit Section Details window for non-standard unit sections; the formula methods are duration days and meeting days
Round Method	Display only		Standard round and always round up
Offset Date	Display only		Deadline date + offset constraints
Offset Duration	Display only		Offset days in percentage
Meeting Days/Duration Days	Display only		Number of meeting or duration days
Offset Days	Display only		Deadline date > offset constraints
Deadline Date	Conditionally required	Calendar	Deadline date for variation cutoff, record cutoff, and grading schema
Calculate		Button	Calculates the deadline date
Offset Constraints	optional	Button	Opens Enrollment Deadline Date Offset Constraints window

Table 11–23 Enrollment Deadline Calculations Window Description

Field Name	Type	Features	Description
Grading Schema Tab			
Definition Level	Display only		Institution or organizational unit
Organizational Unit	Display only		Business unit of an institution or an organization, including faculty
Formula Method	Display only		Determines the type of calculation performed on the Unit Section Details window for non-standard unit sections; formula methods are duration days and meeting days.
Round Method	Display only		Determines the rounding method; standard round and always round up
Offset Date	Display only		Deadline date + offset constraints
Offset Duration	Display only		Deadline date > offset constraints
Meeting Days/Duration Days	Display only		Number of meeting or duration days
Offset Days	Display only		Offset days in percentage
Deadline Date	Required	Calendar	Deadline date for variation cutoff, record cutoff, and grading schema
Calculate	optional	Button	Calculates the deadline date Note: Users must click this button if offset constraints is set
Offset Constraints	optional	Button	Opens Enrollment Deadline Date Offset Constraints window
Discontinuation Tab			
Administrative Unit Status	Display only		Institution-defined administrative statuses applicable to a discontinued student unit attempt, as Withdrawn Early and Withdrawn Late; used to determine load, progression, and grades
Description	Display only		Administrative unit status description
Deadline Date	Display only		Day beyond which the student cannot discontinue
Definition Level	Display only		Institution or organizational unit
Organizational Unit	Display only		Business unit of an institution or an organization, including faculty

Table 11–23 Enrollment Deadline Calculations Window Description

Field Name	Type	Features	Description
Formula Method	Display only		Determines the type of calculation performed on the Unit Section Details window for non-standard unit sections; the formula methods are duration days and meeting days
Round Method	Display only		Standard round and always round up
Offset Date	Display only		Deadline date + offset constraints
Offset Duration	Display only		Deadline date > offset constraints
Meeting Days/Duration Days	Display only		Number of meeting days or duration days
Offset Days	Display only		Offset days in percentage
Calculate		Button	Calculates the deadline date Note: Users must click this button to set offset constraints
Offset Constraints		Button	Opens Enrollment Deadline Date Offset Constraints window

11.9 Enrollment Unit Load

11.9.1 Maintaining Load Calendar Structure IGSEN019

Use this procedure to maintain calendar instances in Oracle Student System.

Prerequisites

Calendars IGSCA002

Administrative Unit Statuses IGSEN001

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Load Calendar Structure > Load Calendar Structure window

Steps

Enter data in each field of the window as described in table. Save your work.

Field Name	Type	Features	Description
Calendar Type	Display only		Institution-defined name given to all calendars of a similar classification Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type
Description	Display only		Calendar type description
Start Date	Display only		Calendar start date
End Date	Display only		Calendar end date
Calendar Status	Display only		Calendar status
Unit Load Apportions Region			
Calendar Type	Required		Institution-defined name given to all calendars of a similar classification Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type
Description	Display only		Calendar type description
Percentage	Required		The percentage of load which should be attributed to the related calendar type
Second Percentage	Optional		Percentage used in situations, if a teaching calendar can be related more than once to a load calendar instance
Administrative Unit Load Statuses Region			
Administrative Unit Status	Required		Institution-defined administrative statuses applicable to a discontinued student unit attempt, such as Withdrawn Early and Withdrawn Late > Fail, used to determine
Description	Display only		Administrative unit status description
Unit Attempt Status	Display only		System-defined status of a unit attempts
Load Incurred	Optional	Check box	If selected, indicates that load is incurred for a student attempt with the related administrative unit status

Field Name	Type	Features	Description
Unit Load Apportions Region			
Unit Code	Required	List of values	Unit identifier
Version Number	Required		System-generated number that identifies the unit's version
Title	Display only		Unit title
Percentage	Required		The percentage of load which should be attributed to the related calendar type
Second Percentage	Optional		Percentage used in situations, if a teaching calendar can be related more than once to a load calendar instance

11.9.2 Setting Up Government Snapshot Control IGSST018

The government snapshot control procedure creates government snapshots for a specified submission period, government semester and load calendars.

In the Government Snapshot Control window, users identify government semesters in which individual student unit attempts are reported and map load calendars to each of these semesters.

Each student unit attempt belongs to a particular teaching calendar that can incur load. A teaching calendar is associated with one or more load calendars in order to apportion load from the student unit attempts.

Prerequisites

Load Calendar Structure IGSEN019

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Snapshot Control window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–24 Government Snapshot Control Window Description

Field Name	Type	Features	Description
Submission Year	Required		Submission period for which intake target statistics forwarded to government
Submission Number	Required		System-generated unique submission number for submission year above
Enrollment Statistics Snapshot Date	Display only		Date when enrollment statistics snapshot forwarded to government for the given submission year Note: The enrollment statistics snapshot date appears when a snapshot is selected as a parameter in the Government Submission Snapshot concurrent process.
Completion Date	Optional	Calendar	Date ending submission period
Government Semester Region			
Semester	Required		Code of government semester; users must enter only those government semesters used by the institution
Government Semester Load Override		Button	Opens Government Semester Load Override window for users to override the default load apportion for given load calendars
Government Semester Load Calendar Region			
Load Calendar Type	Required	List of values	Code of user-defined semester-wise load calendar type
Description	Display only		Description of load calendar
Start Date	Display only		Start date of given load calendar
End Date	Display only		End date of given load calendar
Default Load Apportion		Button	Opens Default Load Apportion window for users to view the manner in which load of given load calendar is distributed over teaching calendars

11.10 Credit Point Overrides

11.10.1 Configuring Enrollment Credit Points IGSEN075

An administrator can override the maximum and minimum credit points for the program by associating maximum and minimum credit points with a calendar type.

If the institution includes the Final Maximum Credit and Final Minimum Credit validation steps in the enrollment category process, then the system first checks to see if the maximum and minimum credit points are overridden, if not, it then checks for the maximum and minimum credit points defaults for the current load calendar.

The maximum and minimum credit point requirements can be set in a number of places.

The maximum and minimum credit points can be set for the Program in Basic Program Details. This configuration is used for the validations unless overridden elsewhere.

The Program Maximum and Minimum credit points can be overridden by a personal enrollment eligibility override, by a maximum or minimum limit set for a person ID group, or by a term.

The system first checks the person level to see if the student has a maximum or minimum credit point override. If so, the person level override is used. If no person level override exists, the system checks for an override at the Person ID Group level and uses that, if it exists. If no Person ID Group limit exists, then the system checks for an override at the term level. If no override exists for the term, the information in the Basic Program Details is used.

You should note that certain progression outcomes involve the placing of a hold that can also have an effect on the number of credit points in which a student is allowed to enroll.

Prerequisites

Basic Program Details IGSPS013

Calendars IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Configure Enrollment Credit Points

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–25 Configure Enrollment Credit Points Window Description

Field Name	Type	Features	Description
Program Code	Program Code	List of values	All active program codes
Version Number	Program version number	List of values	Version number for selected program code
Title	Program title		Title of selected program
Min Credit Points Per Calendar	Minimum credit points per calendar		Must be number, max six characters Default value = 0.00 Minimum Credit Points Per Calendar set in Program Structure and Planning
Max Credit Points Per Calendar	Maximum credit points per calendar	List of values	Must be number, max six characters Default value = 0.00 Maximum Credit Points Per Calendar set in Program Structure and Planning
Calendar Type	Calendar for which default credit point limits are overridden	List of values	All active load calendars (calendars with system category of load)
Description	Calendar description		Description for selected load calendar
Minimum Credit Point	Minimum CP enrollment allowed for term		Must be number, max six characters
Maximum Credit Point	Maximum CP enrollment allowed for term		Must be number, max six characters

11.10.2 Setting Up Person ID Group Validations IGSEN077

Institutions may wish to specify how enrollment validations perform for a specific group of students. The Person ID Group Enrollment Setup window enables you to configure certain validations for a specific Person ID Group.

Using a Person ID Group enables users to define a more specific set of students than are defined by an enrollment category.

In addition, users are able to override the minimum and maximum credit points for a specific Person ID Group.

The validations available are the Person ID Group are the Final Minimum Credit, and the Forced Attendance Type.

Prerequisites

Person ID Group Definitions IGSPE001

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Person ID Group Enrollment Setup

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–26 Person ID Group Enrollment Setup

Field Name	Type	Features	Description
Group Code	Required	List of values	Codes for person ID groups; list of all active person id groups Note: Query to find desired Person ID Group
Description	Display only		Person ID group description
Responsible Person Number	Display only		Person responsible for ID group
Show	Default		Displays group of validations Only Program is available, and only specified Program steps are available

Table 11–26 Person ID Group Enrollment Setup

Field Name	Type	Features	Description
Step Meaning	Optional	List of values	Validation to be applied to the person ID group Only three validations are available: Final Minimum Credit and Forced Attendance Type
Notification	Optional	Radio button	Indicates whether validation is set to warn or deny If set to warn, then enrollment is allowed even if student breaches validation. If set to deny, then enrollment is not allowed if student breaches the validation.
Maximum Credit Point Limit	Optional		Indicates override max credit point limit for the designated person id group
Minimum Credit Point Limit	Optional		Indicates override min credit point limit for the designated person id group

11.11 Repeat Processing

11.11.1 Setting Up Repeat Process Configuration IGSOR032

The configure repeat processing procedure enables users to configure rules that enable a student to repeat a unit program if the student has previously attempted or completed the program.

Repeat rules are required to set up Oracle Student System and can be modified at the organization level. The repeat rules can be inherited and modified at the unit level. Repeat rules influence the grading process in an organization. The grading process analyses the previously earned grades and advanced standing units in the repeat process, and calculates grades.

Institutions use the repeat processing tab to indicate the number of times a student can repeat a unit attempt and still get credit or funding for it.

When determining the grading results, users have the opportunity to use an external formula.

External Formula

The following is information on the user hook available when an external formula is used:

Package Dummy Function : IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS

Following is the dummy function call and dummy function. Please check...

Main Package : IGS_AS_FINALIZE_GRADE.finalize_process

Following is the Code , calling Dummy Function (

IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS)

```
-- Repeat Processing
-- If External Formula is set call Repeat Processing User Hook and exit
IF v_external_formula = 'Y' AND
   NVL(v_repeatable_ind, 'Y') = 'N' THEN
IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS(v_suao_rec.person_id,
   v_suao_rec.course_cd,
   v_suao_rec.unit_cd,
   v_suao_rec.cal_type,
   v_suao_rec.ci_sequence_number,
   v_suao_rec.outcome_dt,
   v_suao_rec.grading_schema_cd,
   v_suao_rec.version_number,
   v_suao_rec.grade);
```

Following is that Dummy Package & Function

PACKAGE BODY IGS_AS_USER_REPEAT AS

/* \$Header: IGSAS46B.pls 115.0 2002/03/06 19:22:04 pkm ship \$ */

```
PROCEDURE user_repeat_process ( p_person_id IN NUMBER,
   p_course_cd IN VARCHAR2,
```

```

        p_unit_cd  IN VARCHAR2,
        p_teach_cal_type  IN VARCHAR2,
        p_teach_ci_sequence_number IN NUMBER,
        p_outcome_dt  IN DATE,
        p_grading_schema_cd  IN VARCHAR2,
        p_version_number  IN NUMBER,
        p_grade  IN VARCHAR2)
IS
BEGIN -- user_repeat_processS
    -- User Hook procedure to allow users to use their own logic for repeat processing.
    -- If there is no Institution specific repeat processing this procedure should remain
    empty
    RETURN;
END user_repeat_process;
END IGS_AS_USER_REPEAT;

Control goes to this function and RETURN (Exit) , with doing any processing. So,
the user can put their Logic in this Function.

```

Prerequisites

Organization Unit IGSOR032

Institution IGSOR029

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window >
Repeat Processing tab

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–27 Organization Structure Data Setup Window Description

Field Name	Type	Features	Description
Repeat Processing Tab			
Organization Unit	optional	list of values	organization unit
Description	display only		organization unit description
Include Advanced Standing Units	optional	check box	if selected, indicates that advanced standing units are included in the repeat process
Enrollment Region			
Maximum Repeats for Credit	optional		maximum number of repeats for a credit unit

11.11.2 Setting Up Unit Repeat Families IGSPS107

The unit repeat families procedure enables users to create unit repeat families and associate units to the family. Units attached to a repeat family can be repeated and allotted credit.

Each unit belonging to a repeat family is associated with a repeat code. The associated repeat code queries all the units belonging to a repeat family.

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit > Unit Repeat Families window

Steps

Enter or query appropriate data in each field of the window as described in the table. Save your work.

Table 11–28 Unit Repeat Families Window Description

Field Name	Type	Features	Description
Family Code	Required		Unit repeat family code Note: Each unit can belong to only one unit repeat family.
Description	Required		Unit repeat family description
Closed	Optional	Check box	If selected, indicates that no new unit code can be attached to a repeat family
Unit Repeat Families Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Repeat Families region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Unit Repeat Families region is refreshed only when users navigate to the Unit Code field in the Unit Repeat Families region. Leave deselected to speed up performance when querying records.
Unit Code	Required	List of values	Unit code attached to the unit repeat family
Version Number	Display only		Unit version number
Title	Display only		Unit title

11.11.3 Setting Up Unit Repeat Conditions IGSPS078

Institutions can allow students to enroll in and pass a single unit more than once, each time receiving academic credit that contributes toward program requirements.

The unit repeat conditions procedure enters conditions for a unit that control the conditions under which it is permissible for a student to repeat a previous unit attempt.

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

- 1. Query the appropriate record.
- 2. Click Other Unit Details.
The Other Unit Details region appears.
- 3. Click Unit Repeat Conditions.
The Unit Repeat Conditions window appears.
- 4. Enter data in each field of the Unit Repeat Conditions window as described in the table.
- 5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 11–29 Unit Repeat Conditions Window Description

Field Name	Type	Features	Description
Unit Code	Default display only	List of values	Unit code indicating units that qualify for repeating the context unit
Unit Version	Default, display only		Unit version number Note: To modify unit versions with students enrolled, users must create a new unit version.
Unit Status	Default display only		Unit status; Active, Inactive, Planned Note: Users cannot enter repeat conditions for inactive units.
Unit Title	Default, display only		Unit description
Repeat Conditions Tab			
Same Teaching Period	Optional	Check box	Whether the unit can be enrolled more than once in the same teaching period, such as for research topics

Table 11–29 Unit Repeat Conditions Window Description

Field Name	Type	Features	Description
Maximum Repeats for Credit	Optional		Maximum times student can repeat unit for credit
Maximum Repeat Credit Points	Optional		Maximum credit points student receives when repeating unit
Same Teaching Period Repeat Credit Points	Optional		Maximum credit points student receives when repeating units in the same teaching period
Maximum Repeats for Funding	Optional		Maximum times student can repeat unit for credit and receive funding
Same Teaching Period Repeats	Optional		Maximum times student can repeat unit in same teaching period
Back		Button	Returns users to Basic Unit Details window

11.11.4 Setting Up Unit Section Repeat Conditions IGSPS089

Repeat Conditions indicate conditions under which a unit section may be repeated. These conditions include allowability in the same or other teaching period, maximum number of repeats, maximum repeat credit points, and maximum repeats eligible for funding.

Repeat Family

Repeat Family indicates units acceptable as a substitute for repeating the unit section queried.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

1. Enter or query appropriate data.

- 2. Click Find.
The Unit Section Details window appears.
- 3. Click **Repeat Conditions**.
The Unit Section Repeat Conditions window appears.
- 4. Enter data in each field of the Unit Section Repeat Conditions window as described in the table.
- 5. Save your work.
- 6. To close the window, click **Done**.

Table 11–30 Unit Section Repeat Conditions Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Unit section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number or day and time indicator depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code
Effective Dates	Default, display only		Start and end dates for teaching period

Table 11–30 Unit Section Repeat Conditions Window Description

Field Name	Type	Features	Description
Unit Section Status	Default, display only		Institution-defined unit section status
Unit Section Effective Dates			Start and end dates for unit section if different from the teaching period start and end dates
Repeat Conditions Region			
Re-enroll for Credit allowed	Optional	Check box	If selected, indicates that the student is allowed to re-enroll for credit
Same Teaching Period	Optional	Check box	If selected, indicates that the student is re-enrolling for the same teaching period
Maximum Repeats for Credit	Optional		Maximum repeats allowed for credit
Maximum Repeats for Funding	Optional		Maximum repeats funded
Maximum Repeat Credit Points	Optional		Maximum credit points for the repeat
Same Teaching Period Repeats	Optional		Number of time a teaching period can be repeated
Same Teaching Period Repeat Credit Points	Optional		Credit points for repeating the same teaching period
Back		Button	Returns to the Unit Section Details window

11.12 Reserved Seating

11.12.1 Setting Up Organizational Unit Reserved Seating IGSPS105

The organization unit reserved seating procedure enables users to define priorities and preferences to reserve seats at the organization unit level.

Prerequisites

Organizational Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup window

Steps

1. Select the appropriate record from the list of values.
2. Click OK.

The Organizational Unit Reserved Seating window appears.

3. Enter data in each field of the window as described in the table. Save your work.

Table 11–31 Organizational Unit Reserved Seating Window Description

Field Name	Type	Features	Description
Organizational Unit	Default, display only		Organizational unit code and title
Reserved Seating Priority Region			
Priority Order	Default, display only		Priority order
Priority Value	Required	List of values	Priority value
Reserved Seating Preference Region			
[Data Coordination check box]			If selected data in the Reserved Seating Preference region is automatically refreshed and coordinated with data in the header region If deselected data in the Reserved Seating Preference region is refreshed only when users navigate to the Preference Order field. Leave deselected to speed up performance when querying records
Preference Order			Preference order
Preference Value	Required	List of values	Preference value Note: For any give priority, at least one preference value must be selected.

Table 11–31 Organizational Unit Reserved Seating Window Description

Field Name	Type	Features	Description
Version	Default, display only		Version number
Description	Default, display only		Preference value description
%	Required		Percentage Note: The sum of all preferences and priorities combined must be less than or equal to 100%.

11.12.2 Setting Up Unit Offering Pattern Reserved Seating IGSPS106

The unit offering pattern reserved seating procedure enables users to define priorities and preferences with percentages to reserve seats at the unit offering pattern level.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. To query the appropriate record, click Find.
2. In the Find Units window, query the appropriate record.
3. Click OK.
The Basic Unit Details window appears.
4. Click Unit Offering.
The Unit Offerings window appears.
5. Click Unit Offering Pattern Reserved Seating.
6. Enter data in each field of the Unit Offering Pattern Reserved Seating window as described in the table.

7. Save or save and continue as follows:

File > Save or Save and Proceed

Table 11–32 Unit Offering Pattern Reserved Seating Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit version number
Title	Default, display only		Unit title
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code
Effective Dates	Default, display only		Effective start and end dates
Reserved Seating Priority Region			
Priority Order	Optional		Priority order
Priority Value	Required	List of values	Priority value
Reserved Seating Preference Region			
Preference Order			Preference order
Preference Value	Required		Preference value
Version			Version number
Description	Display only		Preference value description
%	Required		Percentage Note: The sum of all preferences and priorities combined must be less than or equal to 100%.
Back		Button	Returns to the Unit Offerings window

11.12.3 Enrollment Limits, Waitlist, and Reserved Seating IGSPS085

Prerequisites

Location IGSOR031

Unit Classes IGSPS045

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning - Unit Section Details - Unit Section Enrollments Limits, Waitlist and Reserved Seating window

Steps

1. In the Unit Section Enrollments Limits, Waitlist and Reserved Seating window, specify the priority and preference for reserved seating and the preference value percentage in the Reserved Seating tab.

Note: The reserved seating priority and preference indicates which students have higher priority for enrolling when unit or unit section spaces become available. You can identify priorities based on student attributes, such as program, unit set, program stage, organizational unit, or by a default date and time of the enrollment attempt.

2. Save your work.

11.13 Waitlist

Waitlisting is a method by which institution administrators ensure that students are able to enroll into unit sections for which an enrolled student has withdrawn or for which there is an increase in the amount of students allowed into that unit section.

Waitlist functionality enables users to:

- allow students to be placed on waitlists for unit sections for which enrollment is full
- enroll students in the order that the students are placed on a waitlist into a unit section for which an enrolled student has withdrawn or there is an increase in the amount of students allowed into a unit section
- allow or disallow students with time conflicts placement on waitlists

- count waitlisted units in a student's total enrolled credit points, if desired

Enabling Waitlists

The Waitlist Allowed option must be selected for the required teaching calendars in the Institution Waitlist Options window. Only after selecting the above option at the institution level, waitlist can be enabled at the required organizational levels. This is done by selecting waitlist allowed option in the Organizational Unit Waitlist Setup window.

Optionally, the maximum number of students for the waitlist can be defined.

After selecting the waitlist allowed option at the institution and organization levels for waitlist to take effect it is mandatory to check the Waitlist Allowed check box at the unit offering level (PSP - Basic Unit Details window -Unit Offering).

The waitlist option enabled at the unit offering level can be overridden by defining the waitlist profile at the unit section level. (PSP - Basic Unit Details window - Unit Offering - Unit Sections - Unit Section Details - Enrollments- Unit Section Enrollment Limits, Waitlist, and Reserved Seating - Enrollment Waitlist tab).

Oracle Student System automatically enrolls the first student on a waitlist into a unit section if the student passes the validations configured.

The current waitlist functionality does not support priorities and preferences. Instead, students are placed on the waitlist based on the time/date stamp of when they request to be added to the waitlist. The earliest student is the first student on the waitlist.

If a unit section does have waitlist priorities and reserved seating priorities, the reserved seating priorities take precedence over the waitlist prioritizes. This means that if the enrollment for a unit section is full and that unit section has reserved seating priorities, students will not be automatically enrolled when an enrolled student has withdrawn or when there is an increase in the amount of students allowed into that unit section.

If the first student on the waitlist fails validations for automatic enrollment, such as maximum credit points, time conflict, or reserved seats, then Oracle Student System will not enroll that student and will raise a business event. Users can create a workflow for this business event that notifies students of the failure to an administrative user instead.

Institutions may set up Oracle Student System so that maximum credit points are validated during enrollment using both waitlisted and enrolled unit sections. In this case, when a student is moved from the waitlist to the unit section, the credit points

will not change for the purpose of validation, and students will not fail to be enrolled based on credit points.

For time conflicts, institutions may set up Oracle Student System so that time conflicts between enrolled and waitlisted unit sections are not allowed. This means that when a student is enrolled from the waitlist, the student will have already passed the time conflict validation and will not fail to be enrolled.

11.13.1 Setting Up Institution Waitlist Options IGSEN045

If waitlisting is allowed at the institution level, the option can be suppressed in certain instances, such as enrollment for summer or other short terms. Institution Waitlist Allowed option settings have the following effects:

- If the option is set to No, no further waitlist windows are accessible for setup and no waitlist processing is invoked during that enrollment calendar instance.
- If the option is set to Yes, waitlist details can be set at the organization unit level on the Organizational Unit Waitlist Setup window.

The Institution Waitlist Options procedure also allows the institution to determine if students can be simultaneously placed on a waitlist for a unit section while being registered for an alternative unit section of the same unit. Student Simultaneous Waitlist Allowed option settings have the following effects:

- If the simultaneous waitlist is set to No, the system checks to see if the student is currently enrolled for an alternate unit section of the unit.

If this is the case, the system does not place the student on the waitlist and returns a response indicating that the student is already enrolled in another unit section of the unit and is not allowed to be added to the waitlist for the same unit.

If the student is not enrolled in another unit section of this unit, the system places the student on the waitlist for the unit section.

- If the simultaneous waitlist is set to Yes, the system does not perform the previously described validation.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Institution Waitlist Option > Institution Waitlist Options window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–33 Institution Waitlist Options Window Description

Field Name	Type	Features	Description
Calendar Type	Required	List of values	Institution-defined name given to all calendars of a similar classification; each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type
Alternate Code	Display only		Code identifying the program offering in order to simplify data entry
Start Date	Display only		Calendar start date
End Date	Display only		Calendar end date
Waitlist Allowed	Display only	Check box	If selected, enables waitlisting for this specific calendar instance Note: Records for the teaching period cannot be modified or deleted if the Waitlist Allowed Check box is selected at the organizational unit level, the unit offering pattern level, or the unit section level for the same teaching period.
Student Simultaneous Waitlist Allowed	Display only	Check box	If selected, simultaneous waitlisting and enrollment is enabled for this specific calendar instance Note: Records that allow simultaneous waitlisting cannot be modified or deleted, if the number of waitlisted students in the teaching period is greater than zero

Guidelines

Institutions have the option to count waitlisted unit sections in credit point totals. Credit point totals are used for minimum and maximum credit point validations during enrollment.

The following conditions apply depending on which option the institution selects:

- When institutions setup waitlist functionality in such a way that waitlisted unit sections are included in credit point totals, the teaching period and term enrollment totals include enrolled and waitlisted credit points.

- When institutions setup waitlist functionality in such a way that waitlisted unit sections are not included in credit point totals, the teaching period and term enrollment totals include only enrolled credit points.

Institutions also have the option to allow students with time conflicts to be placed on waitlists. If institutions choose this option usually assume that a student will drop the conflicting enrolled unit section when the waitlisted unit section becomes available.

The following conditions apply depending on which option the institution selects:

- When institutions setup waitlist functionality in such a way that time conflicts are allowed with waitlisted unit sections, students may enroll in and be waitlisted for unit sections that overlap or meet at the same time.
- When institutions setup waitlist functionality in such a way that time conflicts are not allowed with waitlisted unit sections, students may not enroll in and be waitlisted for unit sections that overlap or meet at the same time.

Credit point totals are displayed when a self service student user views his or her schedule.

11.13.2 Setting Up Organizational Unit Waitlist Setup IGSEN046

The organizational unit waitlist setup procedure enables users to set up waitlist options at the organizational unit level.

Waitlist attributes are available at both the unit offering and the unit section levels. The Organizational Unit Waitlist Setup window inherits its details from the appropriate organization unit, and the Unit Section Waitlist window inherits its details from the appropriate unit offering.

Note: Currently, the waitlist functionality is based on a first-in, first-out basis. The first student to attempt to waitlist the unit section is assigned the first position in the waitlist. At this time, the priorities and preferences are not in effect.

Prerequisites

Calendar Types IGSCA002

Organizational Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Organizational Unit Waitlist Setup > Organizational Unit Waitlist window

Program Structure and Planning - Unit Section - Unit Section Details > Enrollments button > Unit Section Enrollment Limits, Waitlist, and Reserved Seating window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–34 Organizational Unit Waitlist Setup Window Description

Field Name	Type	Features	Description
Organizational Unit Code	Required	List of values	Institution-defined code for an organizational unit; an organizational unit is identified by its code and start date
Description	Display only		Organizational unit code description
Calendar Type	Required	List of values	Institution-defined name given to all calendars of a similar classification; each calendar type must be assigned a calendar category for the system to determine calendar type's functionality
Alternate Code	Display only		Short reference used to identify the calendar
Effective Dates	Display only		Calendar period start date and end date
Waitlist Allowed		Check box	If selected, enables waitlisting Note: additional information can be entered only if the Check box is selected
Maximum Students Per Waitlist			Maximum students per waitlist
Assess changes for Waitlisted Students?		Check box	Assess changes for waitlisted students
Simultaneous Waitlist/Unit Enrollment Allowed?		Check box	If selected, enables a student to be simultaneously waitlisted for a unit section, even if the student is registered for an alternative unit section of the same organizational unit
Maximum Students Per Student			Maximum students per waitlist
Waitlist Priority Region			

Table 11–34 Organizational Unit Waitlist Setup Window Description

Field Name	Type	Features	Description
[Data Coordination Check box]	Optional	Check box	If selected, data in the Waitlist Priority region is automatically refreshed and coordinated with data in the header region; if deselected, data in the Waitlist Priority region is refreshed only when the user navigates to the Priority Value field in the Waitlist Priority region; leave deselected to speed up performance when querying records.
Order	Display only		Indicates the order of the priority when assigning the waitlisted students to unit sections; if more than one priority is selected, by default the serial numbering is assigned to the priorities; the order of the priorities can be changed by clicking the arrow keys
Priority Value	Required	List of values	Priority values based on which waitlisted students are assigned to a unit section
Waitlist Priority Preference Region			
[Data Coordination Check box]	Optional	Check box	If selected, data in the Waitlist Priority Preference region is automatically refreshed and coordinated with data in the header region; if deselected, data in the Waitlist Priority Preference region is refreshed only when the user navigates to the Preference Code field in the Waitlist Priority Preference region; leave deselected to speed up performance when querying records.
Order	Display only		Indicates the order of the preference for the priority; if more than one preference is selected, by default the serial numbering is assigned to the preferences; the order of the preferences can be changed by clicking the arrow keys
Preference Code	Required	List of values	Preference code
Version	Display only		System-generated number that identifies the version of the preference
Description	Display only		Preference code description

Table 11–35 Unit Section Enrollment Limits, Waitlist, and Reserved Seating window, Waitlist Tabs

Field Name	Type	Feature	Descriptions
Enrollment Waitlist Tab			
Waitlist Allowed	optional	check box	if selected, indicates that waitlist is allowed for the unit section Note: Users can select this checkbox only if the Waitlist Allowed checkbox is selected in the Unit Offerings window.
Actual Waitlist	display only		actual waitlist value
Maximum Students Per Waitlist	required		maximum students in waitlist
Waitlist Priority Region			
Priority Order	display only		unit section waitlist priority order
Priority Value	required	list of values	unit section waitlist priority value Note: For any given priority, at least one preference must be selected.
Waitlist Priority Preference Region			
Preference Order	display only		unit section waitlist preference order
Preference Value	required	list of values	unit section waitlist preference value Note: This further defines criteria that determine the order in which students are waitlisted. Preference value is required for a priority value except where the priority value is Date and Time.
Version	display only		unit section version
Description	display only		unit section description
Enrollment Limits Tab			
Enrollment Actual	display only		actual enrollment value

Table 11–35 Unit Section Enrollment Limits, Waitlist, and Reserved Seating window, Waitlist Tabs

Field Name	Type	Feature	Descriptions
Enrollment Expected	optional		expected enrollment value
Enrollment Minimum	optional		minimum enrollment value
Advance Maximum	optional		maximum advance value
Enrollment Maximum	optional		maximum enrollment value
Override Maximum	optional		maximum increase allowed to the enrollment value
Back		button	returns to the Unit Section Details window

11.13.3 Setting Up Unit Offering Pattern Waitlist IGSPS075

Waitlisting criteria for unit offering pattern enrollments are defined by the institution. Once established, waitlist limits and priorities are used during the enrollment process.

With waitlisting enabled, users can define waitlist setups at the unit level. These setups at the unit level are inherited at the unit section level and can be modified at the same level.

Table 11–36 Waitlist Setup Example

Waitlist Part	Description
Limits	Indicates maximum number of students allowed on unit or unit section waitlist
Priorities and preferences	Indicates which waitlisted students have higher priority for enrolling when unit or unit section spaces become available. Users can identify priorities based on student attributes, such as program, unit set, class standing, organization unit, or by a default date and time of the enrollment attempt.

Table 11–36 Waitlist Setup Example

Waitlist Part	Description
Setup rollover	Indicates that setups can be rolled from one teaching period to another

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Unit Offering.
The Unit Offerings window appears.
3. Click **Unit Offering Pattern Waitlist**.
The Unit Offering Pattern Waitlist window appears.
4. Enter data in each field of the Unit Offering Pattern Waitlist window as described in the table.
5. Save or save and continue as follows:
File > Save or Save and Proceed

Table 11–37 Unit Offering Pattern Waitlist Window Description

Field Name	Type	Features	Description
Unit Code	Default display only		Unit version code
Version Number	Default display only		Unit version number
Title	Default display only		Unit version title

Table 11–37 Unit Offering Pattern Waitlist Window Description

Field Name	Type	Features	Description
Calendar Type	Default display only		Calendar type attached to the unit version
Alternate Code	Default display only		Alternate code for calendar type
Effective Dates	Default display only		Effective period of the calendar type attached to the unit version
Waitlist Priority Region			
Priority Order			Priority type order
Priority Value	Required	List of values	Priority type value; for example, organizational unit, program, date and time
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Waitlist Priority Preference region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Waitlist Priority Preference region is refreshed only when users navigate to the Preference Order field in the Waitlist Priority Preference region. Leave deselected to speed up performance when querying records.
Waitlist Priority Preference Region			
Preference Order			Preference order of priority type
Preference Value		List of values	Priority type preference value; for example, the different program codes for the priority type program
Version Number	Display only		Preference value version number; for example, program version number of preferred program
Description	Display only		Preference value description
Done		Button	Returns users to Unit Offerings window

11.13.4 Enrollment Limits, Waitlist and Reserved Seating IGSPS085

Unit Section Enrollment Waitlist

With waitlisting enabled at the institutional level, users can define waitlist setups at the unit offering pattern and unit levels. These setups at the unit level are inherited at the unit section level and can be modified at the same level.

The unit section enrollment limits and waitlist procedure determines details related to enrollment and waitlist controls and validations which are used during the enrollment process.

Table 11–38 describes the parts involved in waitlist setup.

Table 11–38 Waitlist Setup

Waitlist Part	Description
limits	indicates maximum number of students allowed on unit or unit section waitlist
priorities and preferences	indicates which waitlisted students have higher priority for enrolling when unit or unit section spaces become available. Users can identify priorities based on student attributes, such as program, unit set, program stage, organizational unit, or by a default date and time of the enrollment attempt.
setup rollover	indicates that setups can be rolled from one teaching period to another

Table 11–39 Unit Section Enrollment Limits, Waitlist and Reserved Seating Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	default, display only		unit code
Unit Version	default, display only		unit version
Title	default, display only		unit section title
Location	default, display only		on-campus or off-campus site
Unit Class	default, display only		section number or day and time indicator depending upon selected user profile option
Unit Mode	default, display only		on campus, off campus, or combination
Teaching Period Region			
Call Number	default, display only		call number

Table 11–39 Unit Section Enrollment Limits, Waitlist and Reserved Seating Window Description

Field Name	Type	Features	Description
Calendar Type	default, display only		teaching period calendar type
Alternate Code	default, display only		alternate unit code
Effective Dates	default, display only		teaching period start and end dates
Reserved Seating Allowed	optional	check box	if selected, indicates that reserved seating is allowed for the unit section
Unit Section Status	default, display only		institution-defined unit section status
Unit Section Effective Dates	default, display only		unit section start and end dates if different from the teaching period start and end dates
Enrollment Waitlist Tab			
Waitlist Allowed	optional	check box	if selected, indicates that waitlist is allowed for the unit section Note: Users can select this checkbox only if the Waitlist Allowed checkbox is selected in the Unit Offerings window.
Actual Waitlist	display only		actual waitlist value
Maximum Students Per Waitlist	required		maximum students in waitlist
Waitlist Priority Region			
Priority Order	display only		unit section waitlist priority order
Priority Value	required	list of values	unit section waitlist priority value Note: For any given priority, at least one preference must be selected.
Waitlist Priority Preference Region			
Preference Order	display only		unit section waitlist preference order

Table 11–39 Unit Section Enrollment Limits, Waitlist and Reserved Seating Window Description

Field Name	Type	Features	Description
Preference Value	required	list of values	unit section waitlist preference value Note: This further defines criteria that determine the order in which students are waitlisted.Preference value is required for a priority value except where the priority value is Date and Time.
Version	display only		unit section version
Description	display only		unit section description
Enrollment Limits Tab			
Enrollment Actual	display only		actual enrollment value
Enrollment Expected	optional		expected enrollment value
Enrollment Minimum	optional		minimum enrollment value
Advance Maximum	optional		maximum advance value
Enrollment Maximum	optional		maximum enrollment value
Override Maximum	optional		maximum increase allowed to the enrollment value
Back		button	returns to the Unit Section Details window

11.14 Enrollment Validations

Enrollment validations allow institutions to set up a number of different steps to verify that a student is eligible for enrollment.

These steps can be set to Warn or Deny. If the step is configured and set to Warn and the student fails the step, then the student is allowed to enroll in the unit attempt with only a warning.

If the step is set to Deny and the student fails the validation, then the student is not allowed to enroll in the unit attempt.

Validation steps are available to apply to the Program, Person, and Unit.

The following types of rule checking are available:

- Program Rule Checking
- Program and Unit Rule Checking

- Unit Rule Checking

Each of these types of rule checking are described in this section.

Program Rule Checking

Program rule checking validates a student's enrollment against rules specified for each program offering pattern in the Program Offering Patterns window.

Table 11-40 lists categories of program rules.

Table 11-40 Program Rule Categories

Program Rule Category	Description
cross faculty	maximum number of credit points for which students can enroll in units of a faculty outside their program
cross location	maximum number of credit points for which students can enroll in units at a location other than their program location
cross mode	maximum number of credit points for which students can enroll in units with a mode other than their program mode
cross historical faculty	maximum number of credit points for which students can enroll in units of a faculty outside their program, over the duration of the program

Program and Unit Rule Checking

Program and unit rule checking confirms that students enrolling in units adhere to the attributes of the program offering option, as specified in the Program Offering Options window.

Table 11–41 lists attributes of the program offering options.

Table 11–41 Program Offering Option Attributes

Program Offering Option Attribute	Description
forced location	units should be taken at the location of the student's program offering option
forced attendance mode	units should be taken in the mode specified by the student's program offering option
forced attendance type	derived attendance type for a student's program attempt should be the same as the attendance type of the student's program offering option

Unit Rule Checking

Unit rule checking validates a student's enrollment against predefined rules.

11.14.1 Setting Up Enrollment Category Validation Setup IGSEN058

The enrollment category validation setup procedure enables users to set up enrollment eligibility validation steps for the enrollment eligibility process.

A special case exists for the Final Minimum Credit step. This step allows users to specify what a student's final minimum credit point enrollment must be. This step, if set up, can be configured to Warn or Deny every time the student tries to enroll in a unit attempt. This is the default behavior.

In addition, users can set the Final Minimum Credit step to warn and nominate a date alias. With this configuration, before the date indicated by the date alias value, the student receives warnings that the Final Minimum Credit step is violated. On and after the date alias, the student is denied enrollment if the minimum credit requirement is not met.

Alternatively, users can configure the Minimum Credit Point so that it applies only after the student first reaches the minimum credit requirements. In this scenario, the step is set to Warn, and the When First Reach Minimum Credit Point radio button is selected. Before reaching the minimum credit point threshold, the student receives warnings. After reaching the minimum credit threshold, the student is denied any change that would drop the student below the minimum credit requirement.

Note: The Minimum Credit Point Configuration tab is not enabled if the Final Minimum Credit validation is not configured as a step.

If set, the Forced Attendance Type validation is also affected by the minimum credit point configuration, since attendance type is based on the number of credit points enrolled.

Prerequisites

Enrollment Categories IGSEN009

Enrollment Method Types IGSEN015

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Enrollment Category Validation Setup window

The Find Enrollment Category Validation window appears.

Select your option and click **OK**.

The Enrollment Category Validation Setup window appears.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–42 Enrollment Category Validation Setup Window Description

Field Name	Type	Features	Description
Enrollment Category	Default, display only		Institution-defined classification of students who share common enrollment characteristics.
Enrollment Method Type	Default, display only		The way student is enrolled; face to face or by phone.
Student Commencement Type	Default, display only		The relationship between a group of students and an institution at enrollment; this is used to define enrollment procedure details and steps for each group of students Student groups are NEW, commencing a program. RETURN, continuing in an enrolled program attempt; All, both new and returning students

Table 11–42 Enrollment Category Validation Setup Window Description

Field Name	Type	Features	Description
Enrollment Category Validation Steps Region			
Validation Steps Tab			
Show	Required	List of values	Group for which validations are to be setup
Step Meaning	Required	List of values	Eligibility validation step meaning
Notification	Required	Radio button	Notification: deny or earn
Step Order	Required	List of values	Defines validation step order
Rule Text	Display only		Validation rule set
Edit Rule		Button	Opens the Rule window
Minimum Credit Point Configuration Tab			
Every Time	Default		If selected, the validation is checked every time the student tries to enroll in a unit attempt in Self Service. This is the default and does not need to be configured if this is the desired behavior
Enforce When First Reach Minimum CP	Optional	Radio button	If selected, the validation is not enforced until the student first enrolls in the minimum number of credit points required
Enforce by Date Only	Optional	Radio button	The validation uses the value of the date alias entered as the date for enforcing the minimum credit point limit Note: This is a new date alias. It must belong to the Calendar Category Load Calendar.
Minimum CP Enforcement Date Alias	Optional	List of values	If entered, the final minimum credit point validation uses the value of the date alias entered as the date for enforcing the minimum credit point limit Note: This is a new date alias. It must belong to the Calendar Category Load Calendar.

11.15 Additional Information for Pre-Enrollment Configuration

11.15.1 Setting Up Unit Set Pre-Enrollment Configuration IGSPS124

Year of Program Setup for UK Functionality

Year of program was developed for the United Kingdom but forms part of core Oracle Student System.

Set Up Year of Program Units

The year of program feature is implemented in Oracle Student System using unit sets. The unit sets have a system unit set category of pre-enrollment year.

A unit set is defined for each year of program. Core and optional units can be assigned to a year of program using patterns of study. Institutions can define either generic unit sets which can be assigned to many programs, or specific unit sets which apply to specific programs. The pre-enrollment of students onto unit sets is determined by the unit set pre-enrollment configuration, which specifies the order in which unit sets are taken.

The Unit Set Pre-enrollment Configuration window enables the setup and maintenance of the order of progression from one year of program to the next.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Set > Unit Set Pre-enrollment Configuration window

Steps

1. Enter data in each field of the window as described in the table.
2. In the Mapping Set Code field, enter the mapping set code which identifies the unit set sequence.
3. In the Sequence in Mapping field, enter the sequence number.
4. In the Unit Set Code field, select the unit set code from the list of values.

- 5. Save your work.

Table 11–43 Unit Set Pre-enrollment Configuration Window Description

Field Name	Type	Features	Description
Mapping Set Code	Required		Mapping set code to identify the unit set sequence
Sequence in Mapping	Required		Mapping sequence number
Unit Set Code	Required	List of values	Unit set code

11.16 Self-Service

11.16.1 Self-Service Enrollment Setup IGSEN063

The self service enrollment setup procedure enables users to select the load calendars and unit statuses records to be displayed to self service users. If more than one person type exists, rank can be assigned to each person type. Depending on the ranking, different setup data is used for the self service user with multiple person types.

Users can perform the following tasks:

- Load Calendars tab enables users to view load calendars and select the load calendars records to be displayed.
- Unit Section Statuses tab enables users to view unit section statuses and select the unit status records to be displayed.
- User Ranking tab enables users to view rankings and assign a rank to each person type.

Prerequisites

Calendar Instance Relationship IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Self Service Enrollment Setup > Self Service Enrollment Setup window

Steps

Enter and view data in each field of the window as described in the table. Save your work.

Table 11–44 Self Service Enrollment Setup Window Description

Field Name	Type	Features	Description
Load Calendars Tab			
Load Calendar	Default display only		Load calendars
Effective Dates Region			
Start	Default display only		Load calendar start date
End	Default display only		Load calendar end date
Self Service	Optional	Check box	If selected, the selected records are displayed to the user in self-service
IVR	Optional	Check box	If selected, indicates the load calendars available for your selection Note: If you do not specify a load calendar for IVR, no load calendars will be available for institutions to map and for students to select.
Unit Section Statuses Tab			
Unit Section Status	Default display only		status of unit section, for example Open, Closed
Display	Optional	Check box	If selected, the selected records are displayed to the user
User Ranking Tab			
Person Type	Default display only		Institution-defined classification of persons
Description	Default display only		Person type description
Rank	Required		Rank assigned to person type

11.16.2 Self Service User Activity Setup IGSEN057

The Self Service User Activity Setup window is designed to allow users to grant special override privileges to administrative users.

Any user-defined person type mapped to the system-defined person type of Self Service Enrollment Staff will be available in this form.

For each user-defined person type, the institution can provide different overrides.

If a user has more than user-defined person type of Self Service Enrollment Staff, the Self Service Enrollment Setup window is used to rank the user-defined person types. The user-defined person type with the lowest number has precedence.

Users can also set up administrative unit statuses and date aliases. This is indicated if the person type is to have special drop and withdrawal deadlines.

The Grading Schema tab enables users to setup the last date when the person type can change the grading schema of a student unit attempt. Users can set up the enrollment validations to be enforced. Users can deny, warn, or override the various steps under program, person, and unit validation steps.

If a validation step is set up in the Enrollment Category Procedure Details or in the Enrollment Category Validations Setup forms, then users can set up the same step in the Self Service User Activity window and change the step's behavior.

For example, if a step is set up as Deny in the Enrollment Category Validation Setup, then that step can be set up for an administrative user in the Self Service User Activity window and the step behavior can be changed to Warn for the associated person type. In this way, an administrator can be granted privileges beyond a student.

However, if the step is not configured in the Enrollment Category Validations, then setting the step at the Self Service User Activity level has no effect.

In addition to the validation steps, the list of values contains certain values that are Overrides.

These overrides are:

- Check Encumbrance
- Person Level Time Slot
- Unit Level Time Slot
- Closed Section Override
- Variable Credit Approval

- **Override Waitlist Maximum**

For the overrides to have effect, users must choose them from the list of values and select the Override check box. These overrides override configurations set at different points in the system. For example, the Closed Unit Section override allows the person for whom it is set up to enroll a student into a unit section even if the unit section is full, up to the override limit established in Program Structure and Planning.

Users should also note that if a validation step is set to Warn in the Enrollment Category Validation Setup window and is set to Deny in the Self Service User Activity form, then the Warn will apply so that the validation is triggered in favor of the student.

Note: The functionality is not available for the Discontinuation tab and hence the tab is disabled.

Prerequisites

Calendar Date Alias Instances IGSCA006

Administrative Unit Statuses IGSEN001

Person must be set up.

Enrollment Category Validation Setup IGSEN058

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Self Service User Activity Setup > Self Service User Activity Setup window

Steps

1. Query the person type record associated with system type self service enrollments.
2. Enter data in each field of the window as described in the table.

3. Save your work.

Table 11–45 Self Service User Activity Setup Window Description

Field Name	Type	Features	Description
Person Type	Display only		Institution-defined classification of persons mapped to the system-defined type of Self Service Enrollment Staff
Add Tab			
Record Open Date Alias	Optional	List of values	record open date alias
[Record Open Date Alias]	Default display only		record open date alias description
Record Cutoff Date Alias	Optional	List of values	record cutoff date alias
[Record Cutoff Date Alias]	Default display only		record cutoff date alias description
Grading Schema Tab			
Date Alias	Optional	List of values	Date alias for last date when users can change the grading schema for a student unit attempt
[Date Alias]	Default display only		grading schema date alias description
Discontinuation Tab			
			Functionality not available
Validation Tab			
Show	Default display only	List of values	Validation steps
Default Steps	Optional	Button	Displays all the validations for the validation step selected in Show field
Enforced Validations	Optional	List of values	Displays all validations
Deny	Required	Radio button	If selected, validation restricts users from completing enrollment
Warn	Required	Radio button	If selected, validation warns users but enables enrollment completion

Table 11–45 Self Service User Activity Setup Window Description

Field Name	Type	Features	Description
Override	Required	Radio button	If selected, users can override the selected enrollment validation step at the time of enrollment validation
Enforce All	Optional	Button	Validations defaults to enforce all possible validations
Warn All	Optional	Button	Notification of all selected validations defaults to warn
Override All	Optional	Button	Enables users to override all the selected enrollment validation steps

11.17 Timeslots

Enrollment timeslots are assigned to students in order for the institution to control the time periods during which enrollment is allowed. Timeslots can be configured to allow higher priority students to enroll before lower priority students.

Users specify the daily start and end time and length in minutes of the timeslot appointment. Users set up timeslot setup data and run the concurrent process to assign students to timeslots.

Timeslots can be defined for terms or teaching periods. After users set up dates and times for timeslots for either terms or teaching periods, priority is given to students to enable them to enroll during early timeslots.

Institutions define the criteria for which they prioritize students and timeslots. For example, advanced standing levels and number of enrolled credit points.

Oracle Student System, in the event that multiple students meet the same criteria, asks the users to specify the starting letter for an alphabetical sort.

Users run a concurrent process to assign students to appointments within the timeslot.

Users can review the timeslot assignments in order to search for students who were not originally assigned a timeslot and are now eligible for enrollment.

11.17.1 Setting Up Timeslot Calendar Configuration IGSEN052

The timeslot calendar configuration procedure enables users to create a timeslot name, define start date alias and end date alias for that timeslot. Users can query and view the timeslots created and can modify the start date alias and end date alias.

Prerequisites

Calendar Date Alias Instances IGSCA008

Responsibility

Oracle Student System Super User

Navigation

Enrollments -Setup > Timeslot Calendar Configuration > Timeslot Calendar Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–46 Timeslot Calendar Configuration Window Description

Field Name	Type	Features	Description
Timeslot Name	Required		Timeslot name Note: You must query and view the existing timeslots or enter a new name for the timeslot.
Start Date Alias	Required	List of values	Start date alias when the timeslot becomes effective Note: Absolute value for the date aliases in the selected calendar decides the start and end date of the timeslots, that can be created and assigned to students. Note: start date aliases and end date aliases must be already defined Note: start date alias and end date alias must be of the same calendar category
End Date Alias	Required	List of values	Timeslot end date alias

11.17.2 Setting Up Timeslot Setup IGSEN048

The Timeslot Setup window enables users to set priorities for a timeslot that is assigned to a student.

The timeslot setup procedure enables users to set up priorities and students are assigned to a timeslot as per the order of the priority and preference. For example, there are 20 students and 10 timeslots. The set up priorities are in the order of organizational unit, person ID groups, and program stage. If there are 15 students in the organizational unit, the system searches for the students who are in organizational unit and also in person ID groups. If there are 12 students in an

organizational unit and person ID groups, then system searches for students who are in organizational unit, person ID groups, and also in program stage. The first ten students who belong to this organizational unit, person ID groups, and program stage are assigned to the timeslot. These priorities are defined for a combination of program type group, calendar, and student type. Users can also query and view the priorities already defined.

Users can also assign preferences for the each priority. For example, a program type is selected as a priority and program type can consist of preferences in the order graduate, masters degree, and library. The program type with preference graduate is given the preference.

Users can also assign timeslots without any priority.

Prerequisites

Calendar Types IGSCA002

Organizational Units IGSOR032 (optional)

Person ID Group Definitions (optional) IGSPE001

Program Type Groups IGSPS002

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Setup > Timeslot Setup > Timeslot Setup window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–47 Timeslot Setup Window Description

Field Name	Type	Features	Description
Program Type Group	Required	List of values	Institution-defined classification of higher education programs, such as higher doctorate, diploma, and non-award program Note: Program type groups must be already defined.
Calendar	Required	List of values	Institution-defined name given to all calendars of a similar classification. Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type Note: Calendars must be already defined.
Alternate Code	Display only		Short reference used to identify the calendar
Student Type	Display only		Student type
Effective Date	Display only		Calendar period start date and end date
Assign Randomly		Check box	If selected, students of the selected program type and calendar are assigned to a timeslot without any priority and preference
Sort by Surname Starting with	Optional	List of values	Sorts students on the basis of alphabet selected
Timeslot Priority Region			
[Data Coordination Check box]	Optional	Check box	If selected, data in the Timeslot Priority region is automatically refreshed and coordinated with data in the header region. If deselected, data in the Timeslot Priority region is refreshed only when the user navigates to the Priority Value field in the Timeslot Priority region. Leave deselected to speed up performance when querying records.
Order	Display only		Indicates the order of the priority when allocating timeslots; if more than one priority is selected, by default the serial numbering is assigned to the priorities; the order of the priorities can be changed by clicking the arrow keys
Priority Value	Required	List of values	Priority values based on which the timeslots are assigned to students; for example, organizational unit, program type, cumulative grade point average
Timeslot Priority Preference Region			

Table 11–47 Timeslot Setup Window Description

Field Name	Type	Features	Description
Order	Display only		Indicates the order of the preference for the priority; if more than one preference is selected, by default the serial numbering is assigned to the preferences; the order of the preferences can be changed by clicking the arrow keys
Preference	Required	List of values	Preference values
Version	Display only		Program version Note: This field is enabled only if the priority selected is program

11.18 National Student Clearinghouse

The National Student Clearinghouse is a non-profit organization that aids in the student loan program for schools in the United States. The National Student Clearinghouse collects data to identify the following:

- students who withdraw from school and need to begin repayment of student loans
- students who transfer from one school to another
- students who return to school and may be eligible for deferment of repaying student loans
- students who continue school and are eligible for deferment of repaying student loans

Note: Once the National Student Clearinghouse file is created, the institution is responsible for transporting the file to the National Student Clearinghouse.

11.18.1 National Student Clearinghouse Configuration IGSEN074

To configure National Student Clearinghouse reporting, users must identify the existing data elements in Oracle Student System so that the data elements can be properly handled in the report.

For example, the institution must define which attendance type should be considered as full time, and which as part time.

Prerequisites

Nominated Completion Period IGSOR073

Institutions IGSOR029

Organizational Units IGSOR030

Person Details IGSPE034

Attendance Type IGSPS006

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Enrollments - Setup - National Student Clearinghouse Configuration

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 11–48 National Student Clearinghouse Configuration Window Description

Field Name	Type	Features	Description
Default School Code	Required	List of values	institution ID
Branch Code ID Type	Required	List of values	organization unit alternate ID type
Default Branch Code	Required	List of values	default branch code
Permanent Address Type	Required	List of values	permanent address type during the reporting period
Date Graduated	Required	drop-down list	date to use as the status start date, if the student has graduated
Non-Citizen Status Code	Required	List of values	code used to designate the user defined CITIZENSHIP_TYPE that eliminates all non-citizens from the NSC report
Graduate Level Indicator	Required	List of values	student's enrollment in a graduate career program throughout the academic year
Correspondence Program Type Group	Required	List of values	program type group code

Table 11–48 National Student Clearinghouse Configuration Window Description

Field Name	Type	Features	Description
Previous Last Name	Required	List of values	person alias type Note: If a student has more than one previous last name or alias type, recent person alias is selected.
Data Block Indicator	Required	List of values	privacy data group
Enrollment Status Region			
“F” – Full Time	Required	List of values	full-time
“H” – Half Time	Required	List of values	half-time
“L” – Less than Half Time	Required	List of values	less than half time

11.19 HESA Reference Data

Enrollment data required by reporting to HESA and not captured in Oracle Student System is manually entered in the UK Statistics Student Program Attempt and Student Unit Set Attempt HESA Details windows.

The Maintain Codes window maintains the Oracle Student System reference codes used in the UK Statistics Student Program Attempt and Student Unit Set Attempt HESA Details windows.

All institutions should set up the following codes:

- OSS NHS Employer
- OSS Qualification Aim Proportion
- OSS term time accommodation indicator
- OSS disability allowance
- OSS New Entrant to HE
- OSS Fee Eligibility Codes
- OSS Major Source of Tuition Fees
- OSS Student FE marker values

- OSS Destination
- OSS SLDD - Discrete provision
- OSS completion status
- OSS good standing marker
- OSS reason for non payment values
- OSS additional support band values
- OSS completion status
- OSS good standing marker
- OSS reason for non payment values

See Define HESA Reference Codes in Chapter 22, "HESA" for information about using the Maintain Codes window.

Records: Advanced Standing

12.1 Advanced Standing

Advanced standing refers to the recognition of students' prior studies or experience as being equivalent to components of their current program attempt or attempts. As a result, students can be exempted from studying certain units and receive advanced standing in the program.

The Advanced Standing windows record and maintain details of student applications for advanced standing and their outcomes.

The main functions of the Advanced Standing windows include the following tasks:

- granting of advanced standing up to the limits specified for each program version in the Basic Program Details window
- entering of units for which advanced standing credit has been approved or from which the student has been waived, and the entering of alternate units
- entering of unit levels for which credit has been approved
- entering of approval details

The Advanced Standing windows interact with the Program Structure and Planning subsystem to apply limits on how much advanced standing can be granted within a given program attempt.

Advanced Standing also interacts with the Admissions and Enrollments subsystems to perform the following tasks:

- preventing students from enrolling in units for which 100% advanced standing credit or preclusion has been granted

- granting advanced standing for approved units and unit levels when the program status is ENROLLED when the Process Advanced Standing Eligibility batch process job is run
- granting advanced standing, as an exception, when the program attempt status is INTERMIT or INACTIVE
- expiring advanced standing records when the program attempt status is not changed from UNCONFIRM to ENROLLED prior to the record's expiration date, when the Expire Advanced Standing batch process job is run

Advanced Standing Types

Table 12–1 shows the types of advanced standing supported by Student System.

Table 12–1 Advanced Standing Types

Type	Description
unit credit	granted when prior studies, expertise, or experience satisfy the objectives of the specified unit. Frequently called an exemption.
partial credit	granted when prior studies, expertise, or experience satisfy a portion of the objectives of the specified unit and entered as credit point value
unit level	granted, when program rules permit, for a number of credit points on the basis of prior studies judged to be acceptable within the structure of the program. Frequently called an unspecified exemption.
unit preclusion	entered when it is inappropriate for a student to enroll in a unit within the program structure. Student must enroll in another unit or group of units with an equivalent credit point value to satisfy program requirements.

Within a single program attempt, students can be granted a combination of unit credit, partial credit, and unit level advanced standing up to limits specified in the program rules. They can also be precluded from enrolling in specified units.

Advanced Standing Statuses

Table 12–2 lists the system-defined statuses that describe the status of a student's advanced standing application.

Table 12–2 Advanced Standing Statuses

Status	Description
APPROVED	indicates student's advanced standing application has been assessed by a responsible authority and approved for the student's program attempt, but not granted
GRANTED	indicates advanced standing, which is approved; applied to an enrolled student program attempt. A status of GRANTED can be applied manually, when an academic transcript is required immediately; however, it is typically applied by the Process Advanced Standing Eligibility batch process job, which checks advanced standing records with the status of APPROVED against the related student program attempts to determine if the program attempt status is changed to ENROLLED. If it is, the advanced standing status changes to GRANTED.
CANCELLED	manually entered when the request for advanced standing is withdrawn by the student, for example, when the student elects to study a unit for which advanced standing has been approved to increase knowledge in that area or improve grades
REVOKED	manually entered when the institution withdraws its approval of an application, for example, if an advanced standing application is approved on the basis of false or misleading information
EXPIRED	automatically applied when advanced standing has not been granted by a specified date. Each advanced standing record with a status of APPROVED has an expiration date. The default expiration date is the approved date plus the number of months specified in the Expiration Date Increment field. The status of EXPIRED is applied by the Expire Advanced Standing batch process job which checks the expiration date of APPROVED advanced standing records against the current date. If the expiration date is earlier than the current date, the advanced standing status changes to EXPIRED.

12.1.1 Setting Up Advanced Standing Configuration Details IGSAV001

The Advanced Standing Configuration window is used to enter data used by the Advanced Standing Details window.

The Advanced Standing Configuration window records control and default information used by advanced standing in the following fields:

- Expiration Date Increment
- Default Basis Institution

Expiration Date Increment

Expiration date increment stores a default expiration date which can be overridden at the individual advanced standing item level.

Advanced standing, which applies to a particular student program attempt, is initially entered with a status of APPROVED, most commonly for UNCONFIRMED program attempts. When the program attempt status changes to ENROLLED, the advanced standing status changes to GRANTED, and advanced standing is applied, typically when a student confirms enrollment and enrolls in units in a program attempt. If a program attempt is not confirmed within a specified period, the advanced standing status is changed to EXPIRED. The Expiration Date Increment field stores the number of months added to the approved date of an advanced standing record to create a default expiration date.

Default Basis Institution

The Default Basis Institution field is optional, designed to accelerate data entry. Insert a default basis institution if a large number of advanced standing records are granted on the basis of prior studies at a single institution. The recommended default value is the code of the local institution.

Prerequisites

Date Aliases IGSCA006

Organizational Structure Setup IGSOR028

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Advanced Standing > Configure Advanced Standing > Advanced Standing Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 12–3 Advanced Standing Configuration Window Description

Field Name	Type	Features	Description
Expiration Date Increment (Months)	Required		Number of months after which approved advanced standing expires for each record in the Advanced Standing Unit Details and Advanced Standing Unit Level Details windows
Default Basis Institution	Optional		Value to default in the Basis Details > Institution Name field of the Advanced Standing Details window

12.1.2 Setting Up System Advanced Standing Types IGSAV002

Advanced standing types are system-defined. Institutions cannot create or delete advanced standing types. Institutions can select the Academic Transcription and Completion/Progression check boxes to modify the effects of advanced standing types.

For example, selecting the Completion/Progression check box for advanced standing type credit indicates that advanced standing credit is counted toward completion and progression. Deselecting the Completion/Progression check box for type Preclusion indicates that advanced standing is not counted toward progression and completion.

The System Advanced Standing Types window assigns attributes to system-defined recognition types. A recognition type describes the effect an advanced standing application has on a student's enrollment when the application is approved. This section describes the following recognition types:

- CREDIT
- PRECLUSION

CREDIT

Credit can be granted for a particular unit when a student has undertaken prior studies considered equivalent to the unit.

PRECLUSION

Granting preclusion from a particular unit occurs when a student's prior studies are not adequate for credit, but studying the unit would not require the usual level of effort. Granting preclusion prevents a student from enrolling in that unit. Students

are enrolled in the alternate unit instead of the precluded unit when the Batch Pre-Enrollment Process batch job is run.

Note: Alternate units in which the student can enroll can be specified.

For example, students who studied music in secondary school might be precluded from the Introduction to Music unit because the class is equivalent to their prior music studies. Alternate units, such as Music 1A or Music 1B, could be specified as options available to precluded students.

Note: In the Advanced Standing Details window, these values are placed in the Advanced Standing Type field.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Advanced Standing > Advanced Standing Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 12–4 System Advanced Standing Types Window Description

Field Name	Type	Features	Description
Advance Standing Type	required, display only		advanced standing type
Closed	optional	check box	if selected, prevents further use of an advance standing type in an advanced standing record Note: Only a system administrator can select or deselect this check box.

Table 12–4 System Advanced Standing Types Window Description

Field Name	Type	Features	Description
Completion/Progression	optional	check box	if selected, indicates that advanced standing details of an advanced standing type is considered towards completion or progression requirements of the program
Academic Transcription	optional	check box	if selected, determines if advanced standing details of an advanced standing type are included on academic transcripts.
Transcript Display Options for Granted Advanced Standing	required	radio button	values are: Credit Points Total, Credit Points Total and Previous Exams, or Previous Units and Exams Credit Points Total - indicates that only credit point totals will be printed on the transcript for advanced standing Credit Points Total and Previous Exams - indicates that only credit point totals and previous exam scores will be printed on the transcript for advanced standing Previous Units and Exams - indicates that all previous unit details and previous exam scores will be printed on the transcript for advanced standing work granted credit

Records: Academic Statistics

13.1 Academic Statistics

The Academic Statistics subsystem maintains the summary record of a student's academic performance that appears on the student's transcript. Included in the record are summarized academic statistics, class standing, and rank in class.

A defined academic statistic type can include attempted credit points, earned credit points, grade point average, or GPA, credit points, quality points, and GPA. A cumulative GPA for institution by career type is typically defined. The academic statistics configuration calculation enables users to accommodate repeat course work, exclude and include specific courses, and enhance user-controlled calculations.

Class standing can be based on earned credit points or on year of program, and allows the grouping of students into similar achievement classifications.

Class ranking compares the student's academic performance against others in a defined grouping based on GPA calculations.

The student's summarized academic record is presented in the View Academic History page in self service. The summary includes the following:

- program status
- progression status
- attendance type
- full time equivalency (FTE) value
- class standing
- user-defined academic statistics
- class rank

13.2 Class Standing

Class Standing provides the institution the ability to group students into cohorts based on stages of completion. Each institution has the ability to define class standing according to its own criteria such as progressive years or ranges of successfully completed credit points toward program completion. The institution can define class standings such as the following:

- freshman
- sophomore
- junior
- senior

The institution then defines how a program will be staged for completion by defining the credit ranges for each of the class standings or by specifying an academic year. Additionally, institutions have the option to either maintain students' class standing status dynamically when their grades change or update the students' class standing at the beginning of each term.

The derived class standing can be overridden for specific student program attempts.

13.2.1 Setting Up Class Standing IGSPR015

This procedure configures class standing data. The Class Standing window is used to enter data used by the Class Standing Schedule window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistics > Class Standing window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 13–1 Class Standing Window Description

Field Name	Type	Features	Description
Class Standing	Required		Class standing
Description	Required		Class standing description
Closed	Optional	Check box	If selected, prevents users from further use

13.2.2 Setting Up Class Standing Schedules IGSPR016

The class standing schedules procedure sets credit ranges or academic years associated with a defined class standing to track program completion by program type as well as effective dates for the defined schedules.

Prerequisites

Class Standing IGSPR015

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program > Program Types > Program Types window

Steps

1. Query the appropriate record.
2. Click **Class Standing Schedule**.

3. Enter data in each field of the window as described in the table. Save your work.

Table 13–2 Class Standing Schedule Window Description

Field Name	Type	Features	Description
Program Type	Display only		Program type class standing records with the same parent program type class standing schedule should have unique values for class standing
Description	Display only		Description
Consider Changes	Required	List of values	Consider changes by period or immediately
Effective Dates	Required	Calendar	Program type effective start and end dates; the Start Date and End Date cannot overlap with other Program Type Class Standing Schedule records for the same program type
Program Type Class Standing Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Program Type Class Standing region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the class standing field in the Program Type Class Standing region. Select to speed up performance when querying records.
Class Standing	Required	List of values	Program type class standing
Description	Display only		Class standing description
Minimum Credit Point	Required		Minimum credit point; minimum value must be less than or equal to maximum credit point
Maximum Credit Point	Required if Academic Year is not selected		Maximum credit point; must be greater than or equal to minimum credit point
Academic Year	Required if Minimum Credit Point and Maximum Credit Points are not selected		Program type academic year

13.3 Career/Program/Unit Relationship

Relationships among career, program, and units are configured in the Career/Program/Unit Relationship window.

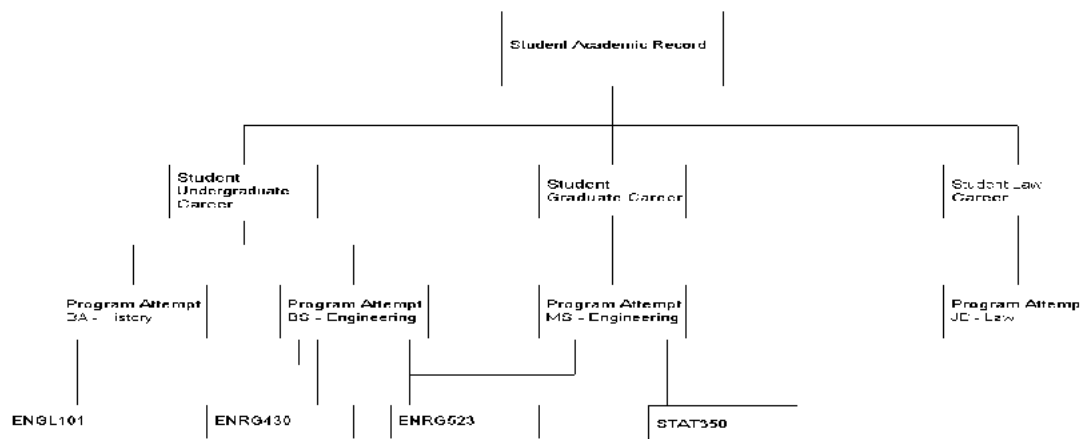
A student can have unit attempts at an institution that were completed under multiple program attempts and career attempts.

You can designate unit attempts to be counted in student career statistics or printed on a student career transcript.

Certain units may call for an exception in the way a unit is treated, that is, the program to which it counts, whether it is computed as part of a student's GPA, whether it is computed in the academic statistics for each program, and whether it shows on different types of transcripts.

Administrative users with appropriate security access can apply changes at the student's unit attempt level to designate units to apply to a student's career statistics and determine whether these units are included on the student's career transcript.

The following figure shows an example relationship between career, program, and unit.

Figure 13–1 Student Career/Program/Unit Relationship Example

In this example, ENRG523 is a unit that may be used for both undergraduate and graduate credit. The application of credit is determined by the career of the student attempting the unit.

STAT350 is an undergraduate unit that a graduate student is taking to meet a prerequisite, even though it will not count toward the student's graduate career program attempt.

13.3.1 Setting Up Program / Unit Relationships IGSPS123

The career program and unit relationship procedure enables users to create relationships between unit attempt and student career statistics or unit attempt and student career transcript.

A student at an institution can have unit attempts that were completed under multiple program and career attempts. Based on the values selected for the student career level and unit program type level in the Career Program/Unit Relationship

window, users can map a relationship between unit attempt and student career statistics or unit attempt and student career transcript.

Prerequisites

Program Types IGSPS001

Unit Program Type Level IGSPS108

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistics > Career Program/Unit Relationship > Career Program/Unit Relationship window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 13–3 Career Program/Unit Relationship Window Description

Field Name	Type	Features	Description
Student Career Level	Required	List of values	Student program career level; for example, Associate, Bachelors, or Masters
Unit Program Type Level	Required	List of values	Unit program type level
Student Career Transcript	Optional	Check box	If selected, maps student career level to student career transcript
Student Career Statistics	Optional	Check box	If selected, maps student career level to student career statistics

13.4 Academic Statistics Calculation

13.4.1 Setting Up Student Statistic Types IGSPR018

The student statistic types procedure is used to define statistic types and statistical elements for a student.

In the Student Statistic Types window, users can define the system statistic elements such as Attempted Credit Points, Earned Credit Points, Grade Point Average, GPA Credit Points, or GPA Quality Points that are associated with a defined Statistic Type.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistics > Student Statistic window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 13–4 Student Statistic Types Window Description

Field Name	Type	Features	Description
Student Statistic Type	Required		Student statistic type Note: This value is displayed in self-service when the statistic configuration display checkbox is checked.
Description	Required		Student statistic type's description
Derivation	Required		Indicates how statistics are derived. Values include Calculated, Stored, and Both.
Closed	Optional	Check box	If selected, prevents further inclusion of statistic type in statistic configurations
Student Statistical Element Region			
Student System Statistical Element	Required	List of values	System-defined statistical element; possible values are: Attempted Credit Points, Earned Credit Points, Grade Point Average, GPA Credit Points, and GPA Quality Points

13.4.2 Setting Up Institution Statistic Type Configuration IGSPR019

The institution statistic type configuration procedure enables users to define which units will be included for statistic type calculation across the institution.

The Institution Statistic Type Configuration window enables users to define the order in which the student statistic types are displayed, whether or not to include

local or external advanced standing credits in the statistic calculation, and what units to include or exclude from the statistic calculation.

Note: Any definition entered in this window can be overridden by defining the values in Organization Unit Statistic Type Configuration window.

Prerequisites

Student Statistic Types IGSPR018

Reference Code Types IGSPS011

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistic > Institution Statistic Type Configuration > Institution Statistic Type Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 13–5 Institution Statistic Type Configuration Window Description

Field Name	Type	Features	Description
Display Order	Required		Institution statistic type display order
Statistic Type	Required	List of Values	Statistic type
Timeframe	Required	Drop-down list	Values are: Cumulative, Period, and Both; default value is Cumulative
Standard	Optional	Check box	If selected, this statistic type will be used as the default calculation across the system; there can only be one statistic type designated as Standard for a specific time frame
Display	Optional	Check box	If selected, this statistic type will be displayed in the View Academic History self service screen.
Include Units Tab			
Include Standard Units	Optional	Check box	If selected, indicates that all student unit attempts are included
Include Local Institution Advanced Standing Units	Optional	Check box	If selected, includes local institution advanced standing units and levels

Table 13–5 Institution Statistic Type Configuration Window Description

Field Name	Type	Features	Description
Include Other Institution Advanced Standing Units	Optional	Check box	If selected, includes other institution advanced standing units
Unit Reference Codes Tab			
Unit Reference Code	Required	List of Values	Unit reference code
Description	display only		Unit reference code description
Include Or Exclude	Required	drop-down list	Values are: Include or Exclude

13.5 Organizational Unit Level Calculation

13.5.1 Setting Up Organizational Unit Statistic Type Configuration IGSPR020

The Organization Unit Statistic Type Configuration window enables users to define the units that are calculated, how units they are calculated, and the order in which units they need to be displayed in self service screens.

The Organization Unit Statistic Type Configuration window has the same configuration parameters as the Institution Statistic Type Configuration window with the addition of specifying an organization unit. Statistics for students enrolled in programs owned by an organization unit with defined statistic types will override the institution statistic type.

If the statistic type is not defined at the institutional level, the statistical information will only show for those students enrolled in a program belonging to the specified organizational unit.

Prerequisites

Organization Structure Setup IGSOR028

Student Statistic Types IGSPR018

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistic > Organization Unit Statistic Type Configuration > Organization Unit Statistic Type Configuration window.

Steps

Query and enter data in each field of the window as described in the table. Save your work.

Table 13–6 Organization Unit Statistic Type Configuration Window Description

Field Name	Type	Features	Description
Organizational Unit	Display only; required		Organizational unit, date, and description
Statistic Type Configuration Region			
Display Order	Required	List of values	Organization unit display order
Statistic Type	Required	List of values	Statistic type
Timeframe	Required	Drop-down list	Organization unit time frame; values are Cumulative, Period, or Both; default value is Cumulative
Standard	Optional	Check box	If selected, this statistic type will be used as the default calculation across the system; there can only be one statistic type designated as Standard for a specific time frame
Progression	Optional	Check box	If selected, indicates that there can only be one statistic type designated as Progression for a specific time frame
Financial Aid	Optional	Check box	If selected, indicates that there can only be one statistic type designated as Financial Aid for a specific time frame.
Display	Optional	Check box	If selected, this statistic type will be displayed in the View Academic History self service screen.
Include Units Tab			
Include Standard Units	Optional	Check box	If selected, indicates that standard units are included

Table 13–6 Organization Unit Statistic Type Configuration Window Description

Field Name	Type	Features	Description
Include Local Institution Advanced Standing Units	Optional	Check box	If selected, includes local institution advanced standing units
Include Other Institution Advanced Standing Units	Optional	Check box	If selected, includes other institution advanced standing units
Unit References Codes Tab			
Unit Reference Code	Required	List of values	Unit reference code
Description	Display only		Unit reference code description
Include Or Exclude	Required	Drop-down list	Values are: Include or Exclude

13.6 Class Ranking

13.6.1 Setting Up Class Rank Cohorts IGSPR024

Prerequisites

Organization Structure Setup IGSOR028

Institution Statistic Types IGSPR019

Calendar Relationships IGSCA004

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Academic Statistics > Class Rank Cohorts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 13–7 Class Rank Cohorts Window Description

Field Name	Type	Features	Description
Cohort Name	Required		Unique name of cohort
[Description]	Required		Description of cohort
Closed	Optional	Check box	If selection, cohort name can no longer be used
Organizational Unit	Optional		Responsible organizational unit
GPA Statistics	Required	List of values	Higher education statistic type that the cohort ranks against
Period	Required	List of values	The timeframe for statistic calculation Valid values include Cumulative and Term
Default Display Type	Required	List of values	The default display type to be used when displaying the statistic without specification Valid values include Decile, Percentile, Quartile, Quintile, Top Third, Vigintile, and n of N
Do Not Skip Values in the Event of Ties	Optional	Check box	If selected, specifies dense rank instead of the default rank
Include On Student Transcript	Optional	Check box	If selected, specifies that the rank will be displayed on the transcript
Include on Student Academic History	Optional	Check box	Allows the user to specify that the rank will be displayed in self-service
Cohort Rule Text	Display only		Cohort selection rule as defined by the rules engine
Edit Rule		Button	Takes you to the Rule window
Class Rank Cohort Instances Region			
Class Rank Cohort Instance	Required	List of values	The calendar description of the selected period for which the cohort has been run against Valid values include any active load (term) calendar that has not previously been associated with this specific cohort name
Cohort Total	Display only		The total number of students within the cohort instance
Cohort Status	Required	List of values	Specifies whether or not the cohort will evaluate the population or use the stored population

Table 13–7 Class Rank Cohorts Window Description

Field Name	Type	Features	Description
Run Date	Display only		The date that the cohort instance ranking process was run
Rank Status	Required	List of values	Specifies whether or not the student rankings are available for display
Run Rankings		Button	Runs rankings
View / Override Class Rank		Button	Overrides class rank

Records: Assessments

14.1 Assessments

The Assessments windows manage the academic assessment of students enrolled in units of study, including the following functions:

- recording and maintaining assessment items, assessment patterns, grading schema, and related details
- managing all examination functions in conjunction with an integrated, external timetable generator program, such as timetables, examination materials, examination supervision, and examination locations and venues
- managing critical assessment related calendars and dates
- entering and publishing results
- generating assessment related correspondence
- entering and managing assignments, assignment due date extensions, and assignment outcomes
- managing applications for special consideration and their outcomes
- managing attendance tracking

Assessments Reference Data

For the Assessments functionality of the Academic Records subsystem to function, the reference data listed in the following table must be created and maintained.

Table 14–1 Assessments Reference Data

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
assessment types	used in the definition of assessment items in the Assessment Items window	required	Assessment Types	none
examination material types	used in the definition of examination materials in the Assessment Item Examination Materials window	required	Examination Material Types	none
assessor types	used to define an assessor assigned to an assessment item in the Assessment Items window	required	Assessor Types	none
examination locations	venues and supervisors are attached to locations	required for examination management	Locations	none
venues	supervisors are assigned to venues and examinations are scheduled at venues	required for examination management	Venues	examination locations entered in the Locations window

Table 14–1 Assessments Reference Data

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
assessment item variation cutoff date alias	prevents changes to unit assessment items after a specified date	required Note: A nominal date can be used if the function is not required.	Configure Assessment Calendar	date alias entered in this window must be created in the Date Aliases window
special consideration category	used to categorize special consideration applications in the Special Consideration Application Details window	required for special consideration functions	Special Consideration Categories	none
special consideration outcome	used to enter final outcomes in the Special Consideration Application Details window	required for special consideration functions	Special Consideration Outcomes	none
supervisor types	used to categorize supervisors in the Examination Supervisor Details window	required	Examination Supervisor Types	none
result entry configuration	controls the entry of student unit attempt outcomes during both manual and electronic uploading of results	required for electronic upload of results	Mark/Grade Entry Configuration	none

Table 14–1 Assessments Reference Data

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
tracking types	used to define tracking items. A tracking type can be mapped to the system-defined tracking type ASSIGNMENT.	required for assignment tracking items in the Initiate a Tracking Item for Assignments job	Tracking Types	none

14.2 Attendance

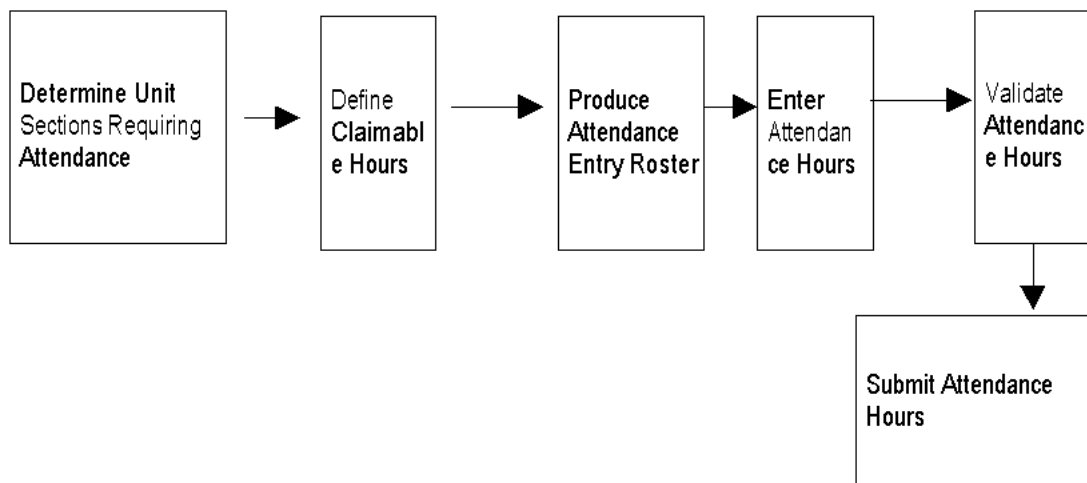
The attendance process includes functionality that is completed in self service. This functionality includes the following:

- attendance entry
- validate attendance
- enter attendance hours

Actual hours of attendance for each student are reported for unit sections identified by the institution. Users can select the Attendance Required check box in the Unit Section Details window at the unit section level to determine attendance requirements. Furthermore, a lead instructor needs to be selected for the unit section and Claimable hours need to be defined at the unit level that are defaulted at the unit section level.

Attendance rosters are produced in self service for each unit section, and instructors assign actual hours of attendees for each student enrolled in the unit section. This information can then be reported by the institution in order to claim funding for the unit section.

Figure 14–1 shows the process for recording attendance.

Figure 14–1 Attendance Process

14.2.1 Setting Up Attendance Entry Configuration IGSAS033

The attendance entry configuration procedure enables users to configure unit attendance entries. Users can specify unit attendance entries based on options such as attendance hours, invalid hours, and claimable hours. The information entered in the Attendance Entry Configuration window is used to configure student's attendance.

Note: Only users with system administrator privileges can access the Attendance Entry Configuration window to modify the rules.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Attendance > Setup > Attendance Entry Configuration Setup > Attendance Entry Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–2 Attendance Entry Configuration Window Description

Field Name	Type	Features	Description
Attendance Entry Mandatory	Optional	Check box	If selected, indicates that attendance entry is required for each student for each unit section marked for attendance entry
Student Unit Discontinued	Required	Drop-down list	Discontinued unit attendance values when effective hours are calculated; values are: Collect Hours or Do Not Collect Hours Note: If Collect Hours is selected, hours are counted for attendance even for discontinued units.
Student Hours Exist	Required	Drop-down list	Claimable existing attendance hours; values are: Do Not Load Hours or Overwrite Hours
Over Claimable Hours Allowed	Required	Drop-down list	Over claimed hours allowed; values are: Warning Only, Do Not Collect Hours, and Allowed

14.2.2 Setting Up Unit Credit Points and Hours - Claimable Hours IGSPS047

Use this window to enter claimable hours. This information is required to enable self-service functionality.

Prerequisites

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Basic Unit Details window

Steps

1. Query the appropriate record.
2. Click Other Unit Details.
3. Click Unit Credit Points and Hours.
4. Enter data in each field of the Unit Credit Points and Hours window as described in the table to enter claimable hours only.
5. Save or save and continue as follows:

File > Save or Save and Proceed

Table 14–3 Claimable Hours, Unit Credit Points and Hours

Field Name	Type	Features	Description
Claimable Hours	Optional		Claimable hours

14.2.3 Setting Up Unit Section Credit Points - Claimable Hours IGSPS086

Claimable hours must be defined to enable self service functionality.

Prerequisites

Unit Section Details IGSPS086

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query appropriate data.
2. Click Find.

The Unit Section Details window appears.

3. Click the Credit Points Button.

The Unit Section Credit Points window appears.

4. Enter data in each field of the Unit Section Credit Points window, as described in the table to enter claimable hours only.
5. Save your work.
6. Click Done to close the window.

Table 14–4 Claimable Hours, Unit Credit Points and Hours

Field Name	Type	Features	Description
Claimable Hours	Optional		Claimable hours

14.3 Grading Schemas

Grading schemas can be associated with units. Optionally, it can be associated at the unit section level or at student unit attempt level. While evaluating the grade of the student, the system looks for the grading schema at the unit attempt level. If a grading schema is not set up at the unit attempt level, the system checks the unit section level. If a grading schema is not set up at the unit section level, the system checks the unit level.

The following topics are described in this section:

- Grading Schema Types
- Grading Schemas and Units
- Grading Schemas and Assessment Item

Grading Schema Types

Grading schema types are a system value, and a grading schema must have only one grading schema type. If the same grading schema is used for a unit in addition to unit assessment items, duplicate schemas must be created and assigned a unique grading schema type. Grading schemas assigned to a type are only available to the associated functionality. For example, assessment item type schemas can only be applied to assessment items.

Grading schemas are separated by system type. These types include the following:

- programs and units
- assessment items
- secondary and tertiary award

For information on secondary and tertiary award, see Oracle Student System for the United Kingdom User's Guide, Chapter 22, Secondary and Tertiary Education Setup.

Grading Schemas and Units

The need to create new schema or new versions of existing schema is determined by the policy of the institution. Grading schema are linked to unit offering options in the Maintain Unit Offering Options window.

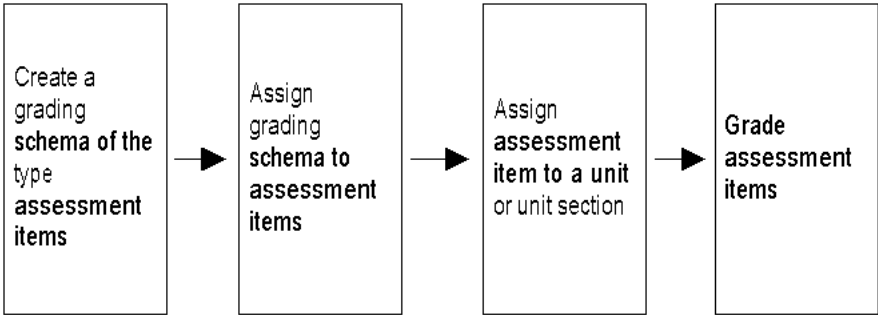
Grading Schemas and Assessment Item

Grading schemas for assessment items must be created before assessment items are created. Assessment item grading schemas can be for grades only or a combination or marks and grades.

Assessment item grading schemas must be of the type ASSESSMENT ITEM, and all assessment items must be assigned a grading schema.

Figure 14–2 shows the process through which assessment items are assigned grades.

Figure 14–2 Grading Schema Process



Users can create grading schemas, assign the grading schema to assessment items, and grade the assessment items. Students can view the assessment item outcomes through self service, and administrative users can view assessment item outcomes through the Assessment Item Outcome History window and through self service.

The assessment items with a grading schema attached are then marked or graded, and the mark or grade is submitted to the database. Users can view the mark or grade received for the assessment items for each student unit attempt.

The following table describes sample grading schema.

Table 14–5 Sample Grading Schema

Grading Schema	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade I
Grade	A	B	C	D	F	I
Full Name	High Dis-tinction	Dis-tinction	Credit	Pass	Fail	Incomplete
Translated Grade	P	P	P	P	F	Translated Grade I
Default Mark Range	85-100	75-84	65-74	50-64	0-49	Not applicable
Result	Pass	Pass	Pass	Pass	Fail	Incomplete

Table 14–5 Sample Grading Schema

Grading Schema	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6
Notional Maximum Percentage	5	10	15	70	not applicable	Not applicable
Notional Minimum Percentage	1	2	5	5	not applicable	Not applicable
Show on Official Notification	Yes	Yes	Yes	Yes	Yes	No
Show on Noticeboard	Yes	Yes	Yes	Yes	Yes	Yes
Show in Newspaper	Yes	Yes	Yes	Yes	Yes	No
Show Internally	Yes	Yes	Yes	Yes	Yes	Yes
System Only	No	No	No	No	No	No
Administrative Only	No	No	No	No	No	No
Default Where Outstanding	No	No	No	No	No	No

The grading process enables users to set up and enter grades and attendance for students.

The grading process includes the following:

- set up anonymous grading
- set up grading schemas and enter grades
- set up incomplete grade conversion system profile
- set up mark/grade entry configuration

The grading process includes functionality that is completed in self service. This functionality includes the following:

- assign anonymous numbers

- produce anonymous rosters
- produce rosters
- grade anonymously
- assign incomplete grades
- assign grades
- translate grades
- submit final unit section grades
- enter and request change of grade
- repeat grade processing
- grade translations

Grade Rosters

Grade rosters are produced in self service for each unit section, and instructors assign a grade for each student enrolled in the unit section and submit midterm, early final, or final grades that are applied to each student's record. Grade rosters are dependent on configuration.

Grade rosters enable instructors to submit valid grades for all or some students enrolled. Instructors are notified of rosters through a Workflow process, asked to enter grades, and allowed to submit grades directly to the database after verification.

Once a grade has been submitted for a student in a unit section, users are not allowed to make any corrections on the Enter Grade self-service page but must use the Change Grade functionality available in self service. The change grade process can be initiated for a submitted grade for a student in through the Enter Grade self-service page.

Grade rosters will have a grading status of Complete or Incomplete. Submission dates must be maintained for all grade rosters so that users can determine which grade rosters remain incomplete at the deadline.

Through the Generate Assessment Notifications concurrent process, institutions will be able to configure a reminder process through workflow which will be sent to instructors.

The following list contains sample notifications to the lead instructors:

- Midterm Advance Notice - is used to send a notification to the instructor informing that the Midterm period is expected to start on a particular date.
- Midterm Start -- is used to send a notification to instructor reminding that the Midterm assessment period has begun.
- Midterm End -- is used to send a notification to instructor informing that the Midterm assessment period has ended and have not submitted their grades.

Users will be able to configure a notification routing workflow that is triggered when final and mid grades are submitted. Institution-defined persons are notified when grades are submitted.

After all grades are submitted, the final grade is automatically updated on students' records.

Change of grades require approval. Appropriate individuals must be notified and approve these grades.

14.3.1 Setting Up Grading Schemas IGSAS025

Grading schemas are created which define acceptable grade sets. These grade sets can be applied to unit sections in the curriculum development process. Students elect a grade schema at the time of enrollment, depending on the institution's policies and set up.

For each grading schema, valid grades that can be submitted by an instructor are defined. Grading schemas that reflect letter grades, numeric marks, or pass/fail evaluations are established and assigned to unit sections during the setup process.

Multiple grading schemas can be assigned to a specific unit section. In this case, students can select a grading schema at the time of enrollment.

The Grading Schemas window maintains basic grading schema details and the available grades within each schema. Grading schemas are used by the manual entry result and electronic upload procedures to determine the grades that can be applied to student unit attempts.

Grading schemas are attached to:

- units in the Unit Grading Schemas window, accessed from Basic Unit Details window
- unit sections in the Unit Section Grading Schemas window, accessed from Unit Sections window

- assessment items in a unit in the Unit Assessment Items window accessed through
- assessment items in a unit section in the Unit Section Assessment Items window accessed through

You can specify if grades of a grading schema are to be published on noticeboards, transcripts, files, or newspapers.

Special grade types may be associated with grades and may take on special meaning when applied to a student unit, for example, passing the student irrespective of results or giving the student a temporary grade to be changed later by the regular assessor of the student, or to be changed after the student has completed supplementary or special examinations.

Note: UK users go directly to Define Grading Schemas for UK Functionality.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas window

Steps

Enter data in each field of the window as described in the table. Save your work.

14.3.1.1 Define Grading Schemas for UK Functionality

A grading schema must be defined for each of the qualification types included in the calculation of the UCAS tariff and the HESA highest qualification on entry.

The UCAS tariff associated with a particular grading schema grade should be recorded as the grade rank.

Prerequisites

Grading schema types must be defined to set up the correct grading schema for use.

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas window

Steps

Enter data in each field of the window as described in the table. Save your work.

If the grading schema applies to a qualification which forms part of the UCAS tariff, the Grade Rank field is populated with the UCAS tariff. The rank for the grading schema is defined for the HESA highest qualification on entry.

Table 14–6 Grading Schemas Window Description

Field Name	Type	Features	Description
Grading Schema Code	Required		Unique grading schema code
Version Number	Display only		Grading schema version; automatically created upon save Note: If there are several versions of a particular grading scheme, only one can have no end date.
Description	Required		Description of grading schema
Grading Schema Type	Required	List of values	Seeded grading schema types
Effective Dates	Required	List of values	Dates range for the grading schema. If there are several versions of a particular grading schema, the date ranges cannot overlap.
[Descriptive Flexfield]	Optional		User-customization field
Comments	Optional		Comments
Grade Translations		button	Opens the Grading Schema Grade Translations window
Grading Schema Grades Region			

Table 14–6 Grading Schemas Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Grading Schema Grades region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Grade field in the Grading Schema Grades region. Select to speed up performance when querying records.
Grade	Required		Grade assigned Note: Grades cannot be added to a grading schema that does not have a current or future date range.
Full Grade Name	Required		Full name of grade
Result	Required	List of values	Result of the grading schema
Marks Range Lower	Optional		Lower marks range for the grading schema Note: The mark ranges for different grades within the schema cannot overlap. If either the upper or lower mark range is set, both lower and upper range must be set.
Marks Range Upper	Optional		Upper marks range for the grading schema Note: The mark ranges for different grades within the schema cannot overlap. If either the upper or lower mark range is set, both lower and upper range must be set.
Grade Rank	Required		Numerical order of the grade Note: Each grade must have a unique rank. The value of order can be from 0 to 999. The order must be assigned so that 0 equals the highest grade, 2 equals the next highest grade, and so on. Note: Grade rank is also used in progression rules.
Grade Point Average Value	Optional		Value used in the calculation of program grade point averages
External Grade	Optional		Alternate grade for external publication
Grading Period	Optional	drop-down list	Values are Midterm, Final Valid grading period for grading schema

Table 14–6 Grading Schemas Window Description

Field Name	Type	Features	Description
Repeat Grade to Report	Optional	List of values	Repeat grades to report Valid values are grades in the parent grading schema and grades for which the Repeat Processing check box is set.
Special Grade Type	Optional	drop-down list	Special grade types associated with grade; Conceded-Pass which passes the student for the unit attempt irrespective of result, Special-Exam which identifies students for special or deferred examinations sending their details to the exam scheduling interface, Supp-Exam which identifies students for supplementary examinations, or Replaceable grade granted for a student unit attempt which can be later replaced; a Replaceable grade may be given when the student takes the unit at a location different from the usual one and is therefore assessed by an assessor who does not know him
Grade Inclusion Region			
Noticeboard	Optional	Check box	If selected, designates whether Unit Attempt with this grade is included in notice board published grades.
Official Transcript	Optional	Check box	Designates whether Unit Attempt with this grade is included on printed Official Transcript
Newspaper	Optional	Check box	If selected, the results of unit attempt are included to be published in a newspaper.
Internal Documents	Optional	Check box	If selected, includes the result of jobs to produce internal documents
Earned Credit Points	Optional	Check box	If selected, unit attempt with this grade is included in calculations of earned credit points in academic statistics
Repeat Processing	Optional	Check box	If selected, unit attempt with this grade is included in calculation of maximum number of repeat attempts of a Unit
Notional Percentage Grade Distribution Region			
Minimum	Optional		Minimum percentage of students that achieve a certain grade

Table 14–6 Grading Schemas Window Description

Field Name	Type	Features	Description
Maximum	Optional		Maximum percentage of students that achieve a certain grade
Administrator Only	Optional	Check box	If selected, only the administrator can assign this grade
System Assigned	Optional	Check box	If selected, indicates that grades can only be assigned by Student System, not by users
Default Outstanding Grade	Optional	Check box	If selected, sets the grade as the grade to be inserted by the Insert Administrative Grades procedure, if an alternate grade is not specified as a parameter. Note: Only one grade within a grading schema can be set as the default outstanding grade.
[Descriptive Flexfield]	Optional		User-customization field

14.3.2 Setting Up Grading Schema Grade Translations IGSAS026

Use this procedure to map one grading schema to another for grade translations at the unit level. Grading schemas are attached to a unit in the Unit Grading Schemas window. However, the student may wish to see grades for the unit attempt in a grading schema different from the default grading schema assigned to the unit section. In such cases, grades can be translated from one grading schema to another.

Students enrolled in a unit section can have a grading schema mapped to their program offering patterns. In this case, if the program grading schema has precedence, a student's grade from the unit grading schema is translated to the grade for the program grading schema.

Unit sections must have a grading schema assigned. However, program offering patterns can also be assigned a grading schema. Outcomes are entered in the context of the unit section grading schema. The student's recorded unit outcome must be translated to the corresponding grade in the program grading schema if a student is enrolled in the unit offering and program and if the unit section Unit Grading Schema Precedence check box is not selected. To do this, relationships must be established between grades in the unit grading schema and the program grading schema.

Note: UK users go directly to Define Grading Schema Mappings for UK Functionality.

Prerequisites

Grading Schemas IGSAS025

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas window

Steps

1. Select the grading schema to be translated.

2. Click **Grade Translations**.

The Grading Schema Grade Translations window appears.

3. Query the appropriate record in the To Grading Schema region.

Enter data in each field of the window as described in the table. Save your work.

14.3.2.1 Define Grading Schema Mappings for UK Functionality

To derive the highest qualification on entry, each of the grading schema records for each of the entry qualifications must be mapped to the relevant HESA highest qualification on entry; for example, an A level grade is mapped to the highest qualification on entry grade of 40.

Prerequisites

Grading schema types must be defined to set up the correct grading schema for use.

Grading schemas must be defined to translate grading schemas.

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas window

Steps

1. Query the grading schema to be mapped.

2. Click the **Grade Translations** button.

The Grading Schema Grade Translations window appears.

3. In the To Grading Schema region, select the highest qualification on entry grading schema.
4. Enter the grading schema mappings.
5. Save your work.
6. Repeat for each grading schema or highest qualification entry grading schema required.

Table 14–7 Grading Schema Grade Translations Window Description

Field Name	Type	Features	Description
From Grading Schema Region			
Grading Schema Code	Default, display only		From grading schema code
Version	Default, display only		From grading schema version number
Description	Default, display only		From grading schema description
Effective Dates	Default, display only		From grading schema effective start and end dates
From Schema Mappings		button	Opens From Schema Grade Mapping region; all mapped grades in From Grading Schema region are displayed
To Grading Schema Region			
Grading Schema Code	Default, display only		To grading schema code; maps From grades to To grades for translation by selecting a grade from the List of values in the From Grade Field
Version	Default, display only		To grading schema version number
Description	Default, display only		To grading schema description
Effective Dates	Default, display only		To grading schema effective start and end dates
To Schema Mappings		Button	Opens To Schema Grade Mapping region; all mapped grades in To grading schema are displayed

Table 14–7 Grading Schema Grade Translations Window Description

Field Name	Type	Features	Description
Grading Schema Grade Translation Region			
[Data Coordination Check Box]			If selected, data in the Grading Schema Grading Translation window is automatically refreshed and coordinated with data in the Grading Schema window; if deselected, data in the Grading Schema window is refreshed only when the user clicks in Grading Schema Translation region. Leave deselected to speed up performance when querying records.
From Grade	Required	List of values	Grade to be mapped to To Grade field Note: The List of values lists only those grades in the To Grading Schema.
Results	Display only		Grading schema grade results from grades
Lower	Display only		Grading schema lower range from grades
Upper	Display only		Grading schema upper range from grades
To Grade	Required	List of values	Grade to be mapped to From Grade Note: The List of values lists only those grades in the From Grading Schema.
Results	Display only		Grading schema grade results
Lower	Display only		Grading schema lower range
Upper	Display only		Grading schema upper range
From Schema Grade Mapping Region			
(Schema Grade Mapping) From Grades Region			
Grades	Display only		From grades grades
Lower	Display only		From grades lower
Upper	Display only		From grades upper
Results	Display only		From grades results
(Schema Grade Mapping) To Grades Region			

Table 14–7 Grading Schema Grade Translations Window Description

Field Name	Type	Features	Description
GS Code	Display only		To grades grading schema code
Ver	Display only		To grade version number
Grades	Display only		To grades grade
Lower	Display only		To grades lower
Upper	Display only		To grades upper
Results	Display only		To grades results
Back		Button	returns to Grading Schema Grade Translation region
To Schema Grade Mapping Region			
(Schema Grade Mapping) From Grades Region			
GS Code	Display only		From grades grading schema code
Ver	Display only		From grades version
Grade	Display only		From grades grade
Lower	Display only		From grades lower
Upper	Display only		From grades upper
Results	Display only		From grades results
(Schema Grade Mapping) To Grades Region			
Grade			To grades grade
Lower	Display only		To grades lower
Upper	Display only		To grades upper
Results	Display only		To grades results
Back		Button	Closes To Schema Grade Mapping region and returns users to Grading Schema Grade Translation region

14.4 Assessment Items

An assessment item is an activity used to evaluate a student’s understanding of a unit of study. For example, a student can be assessed in a unit by submitting a number of assignments, sitting for a written examination, or participating in a practical examination. Each of these requirements is an assessment item.

Each unit has a different set of assessment items associated with it.

Assessment types classify assessment items. A particular assessment item is identified by a system-assigned identification number, along with an assessment type and description.

The following table describes sample assessment items.

Table 14–8 Sample Assessment Items

Identification Number	Assesment Type	Description
42	THRY-CTL - Theory examination centrally administered.	Creative Writing 1
57	THRY-FAC - Theory examination administered by faculty.	Psychology 1
72	THRY-CTL - Theory examination centrally administered.	Language 1
121	ORAL-CTL - Oral examination centrally administered.	Indonesian 1
146	ORAL-FAC - Oral examination administered by faculty.	Chinese 1
220	PRAC-FAC - Practical examination administered by faculty.	Preliminary Physics
223	ASSIGNMENT - Assignment.	Myth in the Modern Era

Assessment items are entered and maintained using the Assessment Items window. Only assessment items used by specific system functionality need to be entered. For example, examinations to be scheduled and assignments to be tracked must be entered. Examinations given outside of scheduled examination periods or assignments that are not tracked do not need to be entered.

Note: Special consideration applications for a unit assessment item cannot be processed, nor can the system be used to advise students of all their assessment

requirements, unless the assessment item is entered in the system and assigned to a student unit attempt. The complete set of assessment items and patterns should be entered for each unit.

Assessment items can be examinable or nonexaminable. Essays, assignments, theatrical and musical performances, and practical examinations are nonexaminable. Examples of examinable assessment items include multiple choice tests and standardized tests.

The exam timetable functionality can be used only with examinable assessment items. The Examinable indicator is set or unset for each assessment type and the setting is transferred to new assessment items of the same assessment type.

Examinable assessment items can be scheduled or not scheduled. The Scheduled indicator is set or unset for each examinable assessment item. Scheduled items are processed by a timetabling application. Nonscheduled items occur outside the defined examination period and are not processed by a timetabling application.

The following table lists additional details that can be entered about each examinable assessment item using navigation buttons in the Assessment Items window. The only additional information that can be entered about nonexaminable assessment items is Assessors.

Table 14–9 Examinable Assessment Item Details

Examinable Assessment Item Detail	Description
Comments	text field for entering comments about an assessment item
Supplied Materials	text field, list, or both for entering the materials supplied by the institution for an examination
Allowable Materials	text field, list, or both for entering the materials permitted in an examination
Nonallowable Materials	text field, list, or both for entering the materials not permitted in an examination
Supervisor Instructions	text field for entering instructions to examination supervisors of the assessment item
Announcements	text field for entering announcements to be made before, during, or after an examination
Constraints	text field for entering constraints

Table 14–9 Examinable Assessment Item Details

Examinable Assessment Item Detail	Description
Assessment Program Types	assessment item is restricted to student units related to program types entered here, such as Postgrad and Ugrad Note: This assessment item detail is applicable only if a student studies a unit in a program attached to one of these program types.
Assessors	details about assessors for an assessment item Note: One assessor is named the primary assessor. Assessors are assigned an assessor type, which allows a person to be entered more than once while performing different assessor type roles. The role of an assessor can be refined, or restricted, to the unit offering option level.

When a student enrolls in a particular unit of study and the Automatically Maintain Student Unit Attempt Assessment Items process is run, the student inherits the default assessment items associated with the unit. When a default assessment item is attached to a unit after students have enrolled in it, the Apply Unit Assessment Item Modification to Students process assigns the assessment item to student units.

In the Assessment Item window, users can enter assessment item examination materials that are allowed, disallowed, and supplied for examinations. This information is used to manage the supply of examination materials to students and to advise supervisors and students of material that can or cannot be taken in to examinations.

Assessment Patterns

An assessment pattern is a group of assessment items. Assessment patterns are typically used when students are matched to a particular assessment method, for example, one consisting of an examination and three assignments, or another consisting of an examination and a project. Assessment patterns can also be used to enter the proportion of the total assessment applicable to each assessment item.

The following table describes sample assessment patterns.

Table 14–10 Sample Assessment Patterns

Assessment Pattern Code	Assessment Item Number	Assessment Type
AAC131PAT1	10474	Exam

Table 14–10 Sample Assessment Patterns

Assessment Pattern Code	Assessment Item Number	Assessment Type
N/A	10589	Assignment
N/A	10592	Exam
AAC131PAT2	10474	Exam
N/A	10589	Assignment
N/A	10600	Project

The Unit Assessment Patterns window records and maintains assessment patterns. Unlike assessment items, creating assessment patterns automatically attaches them to unit offering patterns.

When a student enrolls in a particular unit of study and the Automatically Maintain Student Unit Attempt Assessment Items process is run, the default assessment pattern and its assessment items associated with the unit are assigned to the student. When a default assessment pattern is attached to a unit after students have enrolled in it, the Apply Unit Assessment Item Modification to Students process assigns the assessment pattern and its assessment items to the student unit attempts.

14.4.1 Setting Up Assessment Types IGSAS001

An assessment type is a means of classifying assessment items. An assessment item is assigned to each assessment item in order to classify the item. Assessment types can be either examinable or non-examinable and can be mapped to a system assessment type. Assessment types are used in the definition of an assessment item.

Different sets of data are collected for examinable and nonexaminable types and different processes are applied to them. For example, examinable items can be passed to the examination timetable scheduling process.

Use this procedure to enter institution-defined assessment types.

The following table describes sample assessment types.

Table 14–11 Sample Assessment Types

Assessment Types	Description
ASSIGNMENT	Assignment

Table 14–11 Sample Assessment Types

Assessment Types	Description
NONCENTRAL.	Non-centrally managed oral examination

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–12 Assessment Types Window Description

Field Name	Type	Features	Description
Assessment Type	Required		Name of the assessment type
Description	Required		Description of the assessment type
Examinable	Optional	Check box	If selected, indicates that the assessment type is examinable
Anonymous Grading	Optional	Check box	If selected, indicates that the anonymous grading is enabled
Closed	Optional	Check box	If selected, indicates that the assessment type cannot be used in future
System Assessment Type	Optional	List of values	System assessment type and description Note: Assessment items are recognized for assignment tracking purposes only if they are of an assessment type mapped to the system assessment type of Assignment.

14.4.2 Setting Up Examination Material Types IGSAS003

Examination material types are items that can be supplied to students appearing for examinations. Students may or may not be allowed to take the items into the examinations. Use this procedure to define supplied, allowed, and not-allowed

material types. Examples of examination material types are calculators, notes, dictionaries, text books, and script books.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Examination Timetable > Examination Material Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–13 Examination Material Types Window Description

Field Name	Type	Features	Description
Examination Material Type	Required		Type of examination material
Description	Required		Description of the examination material type
Closed	Optional	Check box	If selected, the examination material type cannot be deleted
Comments	Optional		Comments

14.4.3 Setting Up Assessor Types IGSAS004

Use this procedure to enter institution-defined assessment assessor types. An assessor is a person who assesses student assessment items or who has a role related to the assessment of students. Assessor type is a means of classifying assessors; for example, example: marker, tutor, unit-chair.

When a new unit assessment item is created, Oracle Student System automatically creates an assessor. The default assessor type must be assigned to the assessor and can be altered.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessor Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–14 Assessor Types Window Description

Field Name	Type	Features	Description
Assessor Type	Required		Type of assessor
Description	Required		Description of the assessor type
Default	Optional	Check box	If selected, marks the assessor type as default Note: To change the default assessor, users must deselect the current default item. Note: Only one assessor type can be selected as default.
Closed	Optional	Check box	If selected, the assessor type cannot be deleted

14.4.4 Setting Up Approved Assessment Item Grading Schema IGSAS037

The approved assessment item grading schema procedure enables users to enter the approved assessment item grading schemas for a unit. Grading schemas are required to be attached to unit assessment items and unit section assessment items. The following conditions apply while assigning grading schemas to assessment items:

- at least one grading schema type of assessment item must be created
- assessment item grading schemas must be of the system grading schema type assessment item
- all assessment items must be assigned a grading schema
- assessment items within a unit can have different grading schemas
- if an institution has defined an approved assessment item grading schema list, only schemas from that list can be selected for the assessment item for the unit

- if an institution has defined an approved assessment item grading schema list and has selected a schema as the default schema for an assessment type, that schema is assigned automatically when an assessment item is created

Prerequisites

Unit Details IGSPS047

Grading Schemas IGSAS025

Assessment Types IGSAS001

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Approved Assessment Items Grading Schema window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–15 Approved Assessment Item Grading Schemas Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version Number	Default, display only		Unit code version number Note: If there are several versions of a particular grading scheme, only one version of the grading schema can have no end date.
Unit Status	Default, display only		Unit status; Active, Inactive, Planned
Title	Default, display only		Unit name
Approved Assessment Item Grading Schema Region			
Assessment Item Type	Required	List of values	Assessment item type

Table 14–15 Approved Assessment Item Grading Schemas Description

Field Name	Type	Features	Description
Grading Schema	Required	List of values	Assessment type grading schema
Schema Version	Display only		Assessment type grading schema version
Description	Display only		Assessment type grading schema description
Default	Optional	Check box	If selected, indicates that the grading schema is automatically assigned to any new assessment item that is created
Closed	Optional	Check box	If selected, prevents further use of the grading schema

14.4.5 Setting Up Assessment Items IGSAS009

The assessment items procedure enables users to enter examinable or non-examinable materials for assessment items. Assessment items enable users to evaluate a student’s understanding of a unit. Items such as Examinations and Oral-examinations are examples for examinable items and Assignments, Recitals, Performances, and Projects are examples for non-examinable items.

Examinations, oral examination are examinable others can be classified as non-examinable.

For assessment items to be associated with students, they must first be linked to students. In Student System, assessment items are generally created directly through unit offering patterns using the Unit Assessment Items window, and are inherited by students during enrolling in a unit. Assessment items can also be created as stand-alone items using this window and linked to one or more unit offering patterns.

Assessment items are identified by a unique ID and categorized by assigning an assessment type. Assessment types are defined by the institution in the Assessment Types window.

An assessment type determines if the assessment item is examinable or non-examinable and affects the configuration of the window. Different sets of data are collected and different processes assigned for examinable and non-examinable assessment items.

The **Program Types** button invokes the Assessment Program Type region in which program types are associated with the selected assessment item. Associating a program type restricts the application of the assessment item to student unit attempts within the specified program type only.

The **Assessors** button invokes the Assessment Item Assessor region in which assessors are associated with the selected assessment item. Assessors are designated an assessor type. The same assessor can be associated with an assessment item more than once. For example, an assessor can exist as a marker for an assessment item at Location X and also as a marker at Location Y, but not Location Z.

The **Assessment Item Examination Material** button invokes Assessment Item Examination Materials window.

Prerequisites

Basic Person Details IGSPE034 - assessors

Assessment Types IGSAS001

Examination Material Types IGSAS003

Assessor Types IGSAS004

Organizational Units IGSOR030

Program Types IGSPS001

Unit Modes IGSPS044

Unit Classes IGSPS045

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Items window

Steps

Enter data in each field of the window as described in the table. Save your work.

Guidelines

The unit assessment item due date must be within the teaching period dates.

The unit assessment item due date must be within the unit section effective dates.

Table 14–16 Assessment Items Window Description

Field Name	Type	Features	Description
Assessment ID	Display only		Assessment identifier Note: The assessment ID is inserted when a record is saved.
Assessment Type	Required	List of values	Assessment type and description Note: If the assessment type is a nonexaminable item such as Assignment, only Comments tab and Assessor button are enabled in the Examination/Non-Examination Details region. Note: Once a non-examinable assessment item is used in Student System, it cannot be changed to an examinable assessment item.
Description	Required		Assessment item description Note: If an examinable assessment item is created through the Unit Assessment Items window the description is defaulted from the unit title.
Anonymous Grading	Optional	Check box	If indicates that the anonymous grading is enabled
Examinable	Optional	Check box	If selected, indicates that the assessment item is examinable
[Descriptive Flexfield]	Optional		User-customization field
Examination/Non-Examination Details Region			
Short Paper Name	Display only		Examination paper short name Note: If an examinable assessment item is created through the Unit Assessment Items window, the short paper name is defaulted from the unit title.
Paper Name	Display only		Examination paper name Note: If an examinable assessment item is created through the Unit Assessment Items window, the paper name is defaulted from the unit title.
Working Time	Display only		Allotted time to a student to complete an examination
Perusal Time	Display only		Allowed to read the exam paper prior to commencement of the examination

Table 14–16 Assessment Items Window Description

Field Name	Type	Features	Description
Scheduled	Display only	Check box	If selected, indicates that an examinable assessment item is to be included in the examination timetable
Question or Title	Optional		Examination question or title
Length or Duration	Optional		Examination length or duration
Comments Tab			
Comments	Optional		User comments
Supplied Materials Tab			
Comments	Optional		User comments
List		Button	Opens the Assessment Item Examination Materials window
Allowable Materials Tab			
Comments	Optional		User comments
List		Button	Opens the Assessment Item Examination Materials window
Non-Allowable Materials Tab			
Comments	Optional		User comments
List		Button	Opens the Assessment Item Examination Materials window
Supervisor Instructions Tab			
Comments	Optional		User comments
Announcements Tab			
Comments	Optional		User comments
Constraints Tab			
Comments	Optional		User comments
Footer Region			
Program Types		Button	Displays Assessment Program Type region

Table 14–16 Assessment Items Window Description

Field Name	Type	Features	Description
Assessors		Button	displays Assessment Item Assessor region
Assessment Item Examination Materials		Button	Opens the Assessment Items Examination Materials window
Assessment Program Type Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Assessment Program Type region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Program Type field in the Assessment Program Type region. Select to speed up performance when querying records.
Program Type	Required	List of values	Assessment program type
Description	Display only		Assessment program type description
Back		Button	Returns to the Assessment Items window
Assessment Item Assessor Region			
Person Number	Required		Person's number
Find Person		Icon	Opens the Find Person window
Name	Display only		Assessor name
Primary Assessor	Optional	Check box	If selected, indicates that the assessor as the responsible senior assessor for the assessment item. For example, the unit moderator or chief assessor Note: It is recommended that a primary assessor be assigned to each assessment item.
Assessor Type	Required	List of values	Assessment item assessor type
Location Code	Optional	List of values	Assessor's location code
Unit Mode	Optional	List of values	Assessor's unit mode

Table 14–16 Assessment Items Window Description

Field Name	Type	Features	Description
Unit Class	Optional	List of values	Assessor's unit class
Item Limit	Optional		Maximum number of assessment items that can be assigned to an assessor
Back		Button	Returns to the Assessment Items window

14.4.6 Setting Up Assessment Item Examination Materials IGSAS010

In the Assessment Item Examination Materials window, users can enter materials that are allowed, disallowed, and supplied for examinations. This information is used to manage the supply of examination materials to students and to advise supervisors and students of material that can or can not be taken in to examinations.

The assessment item examination materials procedure enables users map examination material types to assessment items.

This window is entered in context and displays the following:

- all examination materials types in material type order within material category, when the Complete List button is selected

Queries can be performed on the examination material types, and new types can be associated with the examinable assessment item.

Examination material types are created and maintained in the Examination Material Types window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Items window

Steps

1. Click Assessment Item Examination Materials

The Assessment Item Examination Materials window appears.

- 2. Enter data in each field of the window as described in the table. Save your work.

Table 14–17 *Assessment Item Examination Materials Window Description*

Field Name	Type	Features	Description
Assessment ID	Default, Display only		Assessment identifier
Assessment Type	Default, Display only		Type of the assessment and description
Description	Default, Display only		Description
Working Time	Default, Display only		Amount of time a student has to complete an examination
Perusal Time	Default, Display only		Amount of time allowed for reading the exam paper prior to commencement of the examination
Scheduled	Optional	Check box	If selected, specifies that an examinable assessment item is to be included in the exam timetable
Assessment Item Examination Materials Region			
Examination Material Type	Required		Type of examination material
Description	Required		Description of the material type
Material Category	Required		Material types associated with material category Note: This defaults to the context category if the window was entered using one of the list buttons. However, it can be altered.
Quantity Per Student	Optional		Quantity per student Note: Quantity per student can be set only where the system-defined material category is Supplied.
Comments	Optional		User comment

14.4.7 **Setting Up Unit Assessment Patterns IGSAS013**

The unit assessment patterns procedure enables users to create assessment patterns for unit offering patterns.

Assessment patterns are groups of assessment items. When students enroll in unit attempts, they can be assigned an assessment pattern that automatically attaches the assessment items to the student unit attempt.

A unit offering pattern can have multiple assessment patterns, thereby giving students a choice in the assessment items they complete. For example, a student can have the option to select assessment pattern 1 containing two assignments and an examination, or assessment pattern 2 containing three assignments. Even if no choice of assessment items is permitted, a single available group of assessment items for a unit can be set as an assessment pattern. This gives users the ability to enter the assessment proportion for each item in the pattern.

Users access the Unit Assessment Patterns window through the **Unit Assessment Pattern** button in the Unit Assessment Items window or through the menu.

The following information applies to this procedure:

- Assessment pattern codes must be unique within the unit offering.
- Assessment items must be unique within the assessment pattern.
- Assessment items can only be linked to assessment patterns in unit offering options where the unit version is active.
- If used, percentage apportionment totals must not exceed 100.
- Assessment patterns can be deleted. However, all assessment items must be deleted from the pattern first.
- An assessment item cannot be deleted from an assessment pattern if the unit is part of other unit assessment patterns.
- The assessment pattern location, unit mode, and unit class cannot be modified if an assessment item in the pattern exists in another unit assessment pattern.
- The percentage apportionment defines the total assessment that the assessment item represents within the assessment pattern.
- If a unit offering pattern is related to more than one examination period, for example, year long units, unit assessment pattern assessment items can be from different examination periods.

For example, an assessment pattern for a unit offered in a year long teaching period might have two examinations: a midyear examination and a final examination. Each of these examinable assessment items is related to a different examination period. This relationship can be created by specifying the appropriate examination calendar type for each assessment item within the assessment pattern. If the teaching period spans multiple instances of an

examination calendar type, for example, a teaching period that starts in Semester 1 of one year and ends in Semester 1 of the following year, it is necessary to specify the examination calendar instance to which the assessment is related. If the examination calendar type or instance is not specified, the system assumes that the assessment item is related to all of the teaching period's parent examination calendars.

The following information applies to the Reference Field:

- The reference code must be unique for the unit offering, not merely unique for the assessment pattern.
- The reference code must be entered for examinable items and assignments.
- Examinable items must be unique for each item.
- Examinable items must be the same in each record if a particular assessment item is associated with a different section of the same unit offering pattern. This includes deleted items. For example, Assessment Item 22 with a reference of 1-might be associated with a unit section at location A. If 22 is also associated with a unit section at location B, that record must also have a reference value of 1.
- For nonexaminable items of assessment type Assignment, a reference must be unique for a particular assessment type associated with a unit offering pattern. For example, if a unit offering pattern has two assessment items of type Assignment associated with it, each must have a unique reference.
- For nonexaminable items with an assessment type other than Assignment, a reference is optional but must be unique within the assessment type.

Note: Users can query to retrieve existing assessment patterns for the unit offering. Selecting the Include Deleted Items check box displays previously attached assessment patterns. Any assessment items attached to the assessment pattern are also displayed and can be modified. Assessment items can also be deleted from an assessment pattern. If deleting an assessment item, users can also delete the assessment item from the unit offering.

Prerequisites

Assessment Items IGSAS009

Locations IGSOR031

Unit Modes IGSPS044

Unit Classes IGSPS045

Basic Unit Details IGSPS047

Grading Schemas IGSAS009

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Unit Assessment Patterns window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–18 Unit Assessment Patterns Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit assessment pattern code
Version Number	Default, display only		Unit assessment pattern version number
Unit Status	Default, display only		Unit assessment pattern status
Title	Default, display only		Unit assessment pattern title
Calendar Type	Default, display only		Unit assessment pattern calendar type
Effective Dates	Default, display only		Unit assessment pattern effective start and end dates
Unit Assessment Items		Button	Opens the Unit Assessment Patterns window
Unit Assessment Patterns Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Unit Assessment Patterns window is automatically refreshed and coordinated with data in the Unit Assessment Items window; if deselected, data in Unit Assessment Patterns window is refreshed only when the user clicks in the Unit Assessment Pattern region. Leave deselected to speed up performance when querying records.

Table 14–18 Unit Assessment Patterns Window Description

Field Name	Type	Features	Description
Include Deleted Items	Optional	Check box	If selected, indicates that the deleted unit assessment patterns are also displayed while retrieving the records
Assessment Pattern Code	Required		Unit assessment pattern code Note: The assessment pattern code must be unique within the unit offering.
Description	Required		Unit assessment pattern description
Default Pattern	Optional	Check box	If selected, indicates that the assessment pattern is automatically allocated to all students enrolled in the unit using the Automatically Maintain Student Unit Attempt Assessment Item procedure or the Apply Unit Assessment Item Modifications to Student Units procedures Note: Assessment patterns can be attached manually using the Student Unit Assessment Patterns window.
Action Date	Display only		System-defined unit assessment pattern action date when the record is saved Note: Student System uses the action date to determine if there are any changes to a unit assessment pattern that needs to be applied to students enrolled in the unit, through the Modification to Student Units procedure.
Deletion Date	Display only		Unit assessment pattern deletion date; inserted by the system when users delete the assessment pattern and save the change
Location Code	Optional	List of values	Unit assessment pattern location code. Student System restricts the assessment pattern to students enrolled at a particular location, or in a particular unit mode or unit class.
Unit Mode	Optional	List of values	Unit assessment pattern mode
Unit Class	Optional	List of values	Unit assessment pattern class
Unit Assessment Pattern Items Region			
Assessment Item ID	Display only		Assessment item attached to an assessment pattern

Table 14–18 Unit Assessment Patterns Window Description

Field Name	Type	Features	Description
Find Assessment Items		Icon	Accesses the Assessment Items window to select or create assessment item Note: When the window is closed, the new assessment item is inserted automatically and must be saved.
Find Unit Assessment Item Inquiry		Icon	Accesses the Unit Assessment Items Query window Note: All assessment items associated with the context unit are displayed by default. Note: When the window is closed, the selected assessment item is inserted automatically and must be saved.
Assessment Type	Display only		Assessment type
Reference	Optional		Assessment type reference code Note: The reference code must be unique for the unit offering, not merely unique for the assessment pattern.
Examinable	Optional	Check box	If selected, indicates whether the assessment item is an examinable assessment type.
Scheduled	Optional	Check box	If selected, indicates that an examinable assessment item is to be scheduled in the examination timetable
Due Date	Optional	List of values	Assessment item due date Note: A due date is required for assignments that must be tracked. If a due date was entered for the assessment item in the Unit Assessment Items window, it is displayed in this window with the assessment item details. The due date can be modified if required. The due date affects the assessment item due date in the Unit Assessment Items window.
Action Date	Display only		Unit assessment item action date; the system automatically inserts the action date when the record is saved Note: Student System uses the action date to determine if any changes to a unit assessment item need to be applied to students enrolled in the unit through the Apply Unit Assessment Item Modifications to Student Units process.

Table 14–18 Unit Assessment Patterns Window Description

Field Name	Type	Features	Description
% Apportion	Optional		Total assessment that the assessment item represents within the assessment pattern Note: If used, percentage apportionment totals must not exceed 100.
Description	Display only		Unit assessment item description
Deletion Date	Display only		Unit assessment item deletion date. Student System automatically enters the deletion date when the unit assessment item is deleted
Grading Schema	Required	List of values	Unit assessment grading schema and description
Release Date	Optional	Calendar	Unit assessment release date
Examination Calendar Type	Optional		Unit assessment item examination calendar type; if not specified, Student System assumes that assessment item is related to all the teaching period's parent examination calendars
Instance	Display only		Unit assessment item instance

14.4.8 Setting Up Unit Assessment Items IGSAS011

The unit assessment items procedure enables users to enter unit assessment items and map them to unit offerings.

Users can map assessment items to unit offerings in the following ways:

- creating assessment items specifically for a unit
- create stand-alone assessment items that are previously mapped to the unit offering pattern

Note: A unit offering pattern can have multiple assessment items.

The Unit Assessment Patterns window where assessment items are mapped to an assessment pattern, is accessed with the **Unit Assessment Patterns** button. Assessment patterns are grouped with assessment items for a unit offering option. When a stand-alone assessment item is mapped to a unit assessment pattern it gets mapped to the unit section.

If multiple assessment items from another unit are to be attached to a unit offering, duplicate the unit so that the assessment items are attached in the Basic Unit Details window. A unit code can be modified only a unit is saved.

Note: If a unit is duplicated the assessment items attached to it also gets duplicated. When a new version of a unit is created, the unit can be rolled over. All associated details including assessment items are copied into the new version.

An assessment item:

- can be mapped to unit sections only if the unit version is active
- can be mapped to a unit section more than once
- cannot be mapped to a unit section and be restricted to different unit sections
For example, a unit with Location X cannot have an assessment item restricted to Location Y

- cannot be unrestricted and later restricted, nor can it be restricted and later unrestricted
- cannot be restricted on both unit mode and unit class mode in the same restriction

An assessment item can have restrictions on the same location, but unit mode or unit class must differ, and they should not overlap.

- cannot be restricted to a particular location, mode, or unit class that differs from the restrictions applied to the pattern

Either the assessment pattern must be modified or the assessment item must be removed from the assessment pattern.

- cannot be entered twice with the same details
- associated with an assessment pattern cannot be deleted

The assessment item must be removed from the assessment pattern before deleting.

For examinable items, the reference must be unique for each item and must be the same in each record if a particular assessment item is associated with a different unit section of the same unit offering pattern, including deleted items.

For example, assessment item 22 with a reference of 1 is associated with a unit section at Location A. If assessment item 22 is also associated with a unit section at Location B, that record must also have a reference of 1.

For non-examinable items of assessment type Assignment, the reference must be unique for a particular assessment type associated with a unit offering pattern. For example, when a unit offering pattern is associated with two assessment items of type Assignment, each assessment item must have a unique reference. For

non-examinable items with an assessment type other than Assignment, the reference is optional.

If a unit offering pattern is related to more than one examination period, as in the case of year-long units, individual unit assessment items can be associated with different examination periods. For example, a unit offered in a year-long teaching period might have two examinations, one midyear and one at the end of the year. Each of these examinable assessment items is related to a different examination period.

Create this relationship by specifying the appropriate examination calendar type for each assessment item.

If the teaching period spans multiple instances of an examination calendar type, for example, a teaching period that starts in semester 1 of one year and ends in semester 1 of the following year, then specify the examination calendar instance to which the assessment is related.

Prerequisites

Calendar Types IGSCA002

Locations IGSOR031

Unit Modes IGSPS045

Unit Classes IGSPS046

Basic Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Unit Assessment Item window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–19 Unit Assessment Items Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit code
Version number	Default, display only		Unit code version
Unit Status	Default, display only		Unit code status
Title	Default, display only		Unit code title
Calendar Type	Default, display only		Calendar type
Effective Dates	Default, display only		Unit code effective start and end dates
Unit Assessment Patterns		Button	Opens the Unit Assessment Patterns window
Unit Assessment Item Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Unit Assessment Items region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Assessment Item ID field in the Unit Assessment Items region. Select to speed up performance when querying records.
Include Deleted Items	Optional	Check box	If selected, includes the deleted unit assessment items while retrieving the records
Assessment Item ID	Display only		Assessment item identified Note: If both the check boxes are selected, then the assessment item belongs to both default and non default assessment patterns.
Assessment Items		Icon	Opens the Assessment Items window
Unit Assessment Items Query		Icon	Opens the Unit Assessment Item query window

Table 14–19 Unit Assessment Items Window Description

Field Name	Type	Features	Description
Default	Optional	Check box	If selected, allocates assessment item to all students enrolled in the unit If not selected, indicates that the assessment item is optional
Examinable	Optional	Check box	If selected, indicates whether the assessment item is an examinable assessment type
Scheduled	Optional	Check box	If selected, an examinable assessment item is to be scheduled in the examination timetable
Assessment Pattern Default	Display only	Check box	If selected, indicates that assessment item is part of a default assessment pattern
Assessment Pattern Non Default	Display only	Check box	If selected, indicates that assessment item is part of a non default assessment pattern
Assessment Type	Display only		Unit assessment item type
Reference	Optional		Reference to a unique value within each unit offering option assessment type; for example, Assignment 1,1, Assig 2, and Mid-sem exam Examples of reference include assignment 1,1, assig 2, and mid-sem exam. Note: It is mandatory to enter a reference for examinable items and assignments.
Due Date	Optional	Calendar	Unit assessment item due date Note: If the assessment item is an assignment to be tracked through the Tracking subsystem, a due date must be entered. When tracking items for assignments are automatically created in the Initiate Tracking Items for Assignments report, the system uses the due date to derive the action date for the Received from Student tracking step.
Description	Display only		Unit assessment item description
Grading Schema	Required	List of values	Unit assessment item grading schema and description
Release Date	Optional	Calendar	Unit assessment release date Note: Release date should be greater than or equal to due date

Table 14–19 Unit Assessment Items Window Description

Field Name	Type	Features	Description
Deletion Date	Display only		Unit assessment deletion date; the system automatically enters the deletion date when the unit assessment item is deleted
Location Code	Optional	List of values	Unit assessment location code
Unit Mode	Optional	List of values	Unit assessment unit mode
Action Date	Display only		Unit assessment action date; the system automatically inserts the action date when the record is saved Note: Student System uses the action date to determine if any changes to a unit assessment item need to be applied to students enrolled in the unit through the Apply Unit Assessment Item Modifications to Student Units job.
Unit Class	Optional	List of values	Unit assessment unit class
Examination Calendar Type	Optional	List of values	Unit assessment examination calendar type; if not specified, Student System assumes that the assessment item is related to all the teaching period's parent examination calendars
Instance	Optional	List of values	Unit assessment instance

14.4.9 Setting Up Unit Section Assessments IGSPS090

The unit section assessment procedure defines and maintains unit section assessments and provides information about a unit section's final examination, such as date, start and end times, location, building, and room.

Prerequisites

Unit Section Details IGSPS083

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query appropriate data.
2. Click Find.
The Unit Section Details window appears.
3. Click Assessments.
The Unit Section Assessments window appears.
4. Enter data in each field of the Unit Section Assessments window as described in the table.
5. Save your work.
6. To return to the Unit Section Details window, click Done.

Table 14–20 Unit Section Assessments Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Unit section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number or day and time indicator depending upon selected user profile option
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate unit code

Table 14–20 Unit Section Assessments Window Description

Field Name	Type	Features	Description
Effective Dates	Default, display only		Start and end dates for teaching period
Unit Section Status	Default, display only		Institution-defined unit section status
Unit Section Effective Dates	Default, display only		Start and end dates for unit section if different from the teaching period start and end dates
Final Examination Region			
Final Examination Date	Required	Calendar	Final examination date
Start Time	Required	Calendar	Examination start time
End Time	Required	Calendar	Examination end time
Location	Required	List of values	Examination location
Building	Optional	List of values	Building name
Room	Optional	List of values	Examination room
Meet with Exams		Button	Opens Meet with Exams window Note: Meet with Exams Button will be enabled only if the unit section is within a meet with exam group. Users cannot modify unit section assessment details if meet with exams exists for a unit section.
Assessments Items		Button	Opens Unit Section Assessment Items window Note: This window enables users to query or define additional assessment details.
Back		Button	Returns to the Unit Section Details window

14.4.10 Setting Up Unit Section Assessment Items IGSPS092

The unit section assessment items procedure defines and maintains assessments specific to each unit section. Unit section assessment items are inherited from the unit level and can be modified for the specific unit section. The unit section assessment items procedure matches the unit assessments items procedure, allowing further definition of assessment details at the unit section level.

Prerequisites

Unit Section Details IGSPS083

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Unit Section > Unit Section Details window

Steps

1. Enter or query data in appropriate fields.
2. Click Find.
The Unit Section Details window appears.
3. Click Assessments.
The Unit Section Assessments window appears.
4. Click Assessments Items.
The Unit Section Assessment Items window appears.
5. Enter data in appropriate fields of the Unit Section Assessment Items window as described in the table.
6. Save your work.
7. Click Back to close the window.

Table 14–21 Unit Section Assessment Items Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit code
Unit Version	Default, display only		Unit version
Title	Default, display only		Title of unit section
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number, or day and time indicator, depending upon selected user profile option

Table 14–21 Unit Section Assessment Items Window Description

Field Name	Type	Features	Description
Unit Mode	Default, display only		On campus, off campus, or combination
Teaching Period Region			
Call Number	Default, display only		Call number
Calendar Type	Default, display only		Calendar type
Alternate Code	Default, display only		Alternate code of the unit
Effective Dates	Default, display only		Effective start and end dates for teaching period
Unit Section Status			Institution-defined unit section status
Unit Section Effective Dates			Unit section start and end dates, if different from the teaching period start date
Unit Assessment Items Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Unit Section Assessment Items window is automatically refreshed and coordinated with data in the Unit Section Assessment window; if deselected, data in Unit Assessment Items window is refreshed only when the user clicks in Unit Section Assessment Item region. Leave deselected to speed up performance when querying records.
Include Deleted Items	Optional	Check box	If selected, displays deleted items
Assessment Item ID	Required		Assessment item identifier
Assessment Items		icon	Opens Assessment Items window
Unit Assessment Items Query		icon	Opens Unit Assessment Items Query window
Assessment Pattern Default	Optional	Check box	If selected, indicates that assessment item is part of a default assessment pattern
Assessment Pattern Non Default	Optional	Check box	If selected, indicates that assessment items is part of a non default assessment pattern
Assessment Type	Display only		Unit section assessment type

Table 14–21 Unit Section Assessment Items Window Description

Field Name	Type	Features	Description
Reference	Optional		Identifying code, including numbers or other characters, of a unit assignment, examination, or other assessment item
Default	Optional	Check box	If selected, allocates assessment item to all students enrolled in the unit section. If not selected, indicates that the assessment item is Optional
Examinable	Optional	Check box	If selected, indicates whether the assessment item is to be scheduled in the examination timetable
Scheduled	Optional	Check box	If selected, indicates that an examinable assessment item is to be scheduled in the examination time table
Due Date	Optional	Calendar	Unit section assessment item due date
Description			Unit section assessment item description
Grading Schema	Optional	List of values	Unit section assessment item grading schema and description
Release Date	Optional		Unit section assessment item release date
Deletion Date	Display only		Unit section assessment item deletion date; the system automatically enters the deletion date when the unit section assessment item is deleted
Action Date	Display only		Unit section assessment action date; the system automatically enters the action date when the record is saved
Examination Calendar Type	Optional	List of values	Unit section assessment examination calendar type; if not specified, Student System assumes that the assessment item is related to all the teaching period's parent examination calendars
Instance	Optional	List of values	Unit section assessment instance
Back		Button	Returns to the Unit Section Assessments window

14.5 Student Unit Attempt Outcomes

When a unit is assessed, an outcome is entered for the student unit attempt. Outcomes can be entered manually, uploaded electronically, or automatically inserted by the system as a result of the discontinuation of a unit, a blank result, or

nonassessable units or unit attempts, as indicated in the Student Enrollments window.

Outcomes can be expressed in terms of a mark, such as 82%, or a grade, such as Distinction, or both, as determined by the settings for the Mark/Grade Entry Configuration window. The grade must exist in the grading schema used to record the student unit outcome. The system can also be configured to derive a grade from a mark.

14.5.1 Setting Up Assessment Calendar Configuration IGSAS008

The assessments calendar configuration procedure maps a system assessment date alias to an institution-defined date alias.

The Assessments Calendar Configuration window is used to associate the institution-defined date alias, previously created in the Calendar subsystem, with the assessment item variation cutoff date. The assessment item variation cutoff date must be specified if the institution wants to reduce the risk of unauthorized late unit assessment charges.

Note: Date aliases must not be closed and must have a system calendar category of Teaching.

The assessment item variation cutoff date alias must have instances created in each teaching period. The date alias establishes a cutoff date for the alteration of unit assessment items. The date acts as a warning if attempts are made to update a unit's assessment requirements in the Unit Assessment Items window. For example, an institution can determine that the assessment requirements for units should not normally be varied after the end of the second week of standard teaching periods.

For information on creating and maintaining date aliases, see the Maintain Date Aliases window and the calendar subsystem.

For each unit section offered, a grade is entered for either midterm, final or none. For unit sections requiring grades, entry submission start and end dates are maintained. There can be multiple grading periods, based on a grouping of students, for a unit section. For example, for final grading there may be a period for seniors, followed by a period for all other students or there would be midterm grades required only for freshmen.

Grade entry rosters must be produced for both midterm and final grade entry. Before they can be produced, Oracle Student System must recognize what rosters must be produced with start and end dates. End users can add the date alias in the Assessments Calendar Configuration window for this purpose. These dates can act as triggers for the marks or grades submission workflow.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items >
 Assessment Calendar Configuration > Configure Assessment Calendar window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–22 Configure Assessment Calendar Window Description

Field Name	Type	Features	Description
Assessment Item Variation Cutoff Date Alias	Optional	List of values	Assessment item variation cutoff date
Midterm Marks/Grades Submission Start Date Alias	Optional	List of values	Start date alias for midterm Marks/Grades
Midterm Marks/Grades Submission End Date Alias	Optional	List of values	End date alias for midterm Marks/Grades
Early Final Marks/Grades Submission Start Date Alias	Optional	List of values	Start date alias for early final Marks/Grades submission
Early Final Marks/Grades Submission End Date Alias	Optional	List of values	End date alias for early final Marks/Grades submission
Final Marks/Grades Submission Start Date Alias	Optional	List of values	Start date alias for final Marks/Grades submission
Final Marks/Grades Submission end Date Alias	Optional	List of values	End date alias for final Marks/Grades submission

14.5.2 Setting Up Mark/Grade Entry Configuration IGSAS005

This window defines the configuration entered in the Enter Grades and Application Desktop Integrator (ADI) entry self service windows and upload process.

This window enables users to govern the configuration for the following:

- Online Keying
- Electronic Upload
- Grading Period Cohorts

Online Keying

By specifying options for online keying, users determine how results are entered in Enter Grades and ADI entry self service windows and upload process.

Electronic Upload

By specifying options for electronic upload, users determines how validation checks are performed in the ADI upload process for Unit Attempt Outcomes window and Assessment Items window.

Options selected in these fields determine how validations perform in the outcome upload file and the upload student unit attempt outcomes process.

The following table lists the available file validations.

Table 14–23 *Validations for Electronic Upload Configuration*

Validation	Description
Abort File	Enables validation of remaining records to continue if any individual record fails validation. Records that fail validation are entered with the reason in an exception report and the file is not loaded into Oracle Student System.
Do Not Load	Causes the file validation process to ignore any individual record that fail validation and enter them with the reason in an exception report. Records that fail validation are not loaded into Student System. However, all other records are loaded into the validated batch table, but not always uploaded into the database; for example, units discontinued after file validation.
Warning	Appears as a warning on the exception, but the record is loaded. Only the Mark/Grade Invalid validation includes this option.

Grading Period Cohorts

- The Grading Period Cohorts window enables users to set up grading period cohorts.

Prerequisites

Person ID Group Definition IGSP001

Class Standing IGSPR015

Progression Outcome Types IGSPR008

Basic Program Details IGSPS013 must be setup and all programs in ACTIVE status.

Basic Unit Set Details IGSPS047 must be setup and all units in ACTIVE status.

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Mark/Grade Entry Configuration window

Steps

1. To determine the Online Keying Configuration, enter data in each field of the window as described in the table.
2. To determine the electronic upload configuration, select upload file validation options in the appropriate fields.

Note: In the Electronic Upload procedure, records are validated for a mark if the Mark Entry Mandatory check box is selected in the Online Keying Configuration. Records with a grade that has a mark range and no mark entered are not uploaded and details appear in the exception report.

3. To set up grading period cohort, click **Grading Period Cohorts**.

The Grading Period Cohort window appears.

Table 14–24 Mark/Grade Entry Configuration Window Description

Field Name	Type	Features	Description
Online Keying Configuration Region			
Collect Mark	Optional	Check box	If selected, allows the user to insert a mark for each record; by default, this check box is selected Note: This check box must be selected if the Mark Entry Mandatory check box is selected.
Mark Entry Mandatory	Optional	Check box	If selected, a mark is required for each record where the grade has an equivalent mark range; by default, this check box is selected
Derive Grade	Optional	Check box	If selected, Student System automatically derives and inserts the grades for relevant mark range, based on the grading schema; by default, this check box is selected Note: This check box can be selected only if Collect Mark check box is selected.
Invalid Mark/Grade Allowed	Optional	Check box	If selected, allows a grade other than that normally corresponding to the mark to be entered, if the grade is within the relevant grading schema; by default, this check box is not selected
Partial Grade Submission Allowed.	Optional	Check box	If selected, allows the users to submit grades for a subset of students enrolled for a particular unit section; by default, this check box is selected
Mark Entry Decimal Points	Required	Drop-down	Number of decimals for the mark to be entered and displayed; values are 0,1,2, and 3
Electronic Upload Configuration Region			
Person Does Not Exist	Required	Drop-down list	Indicates how to handle upload records with a person number that does not match the person number of any student records in Student System; values are Do Not Load and Abort File; by default, Do not Load is selected
No Program Attempts	Required	Drop-down	Indicates how to handle upload records when student has no program attempt entered; values are Abort File and Do No Load; by default, Abort File is selected

Table 14–24 Mark/Grade Entry Configuration Window Description

Field Name	Type	Features	Description
Unit Not Enrolled	Required	Drop-down	Indicates how to handle records for students; values are Abort File and Do No Load; by default, Do Not Load Record is selected
Unit Discontinued	Required	Drop-down	Indicates how to handle records if withdrawn from unit; values are Abort File and Do No Load; by default, Do Not Load is selected
Submitted Grade Exists	Required	Drop-down	Indicates how to handle records Applied-for which grades exist; values are Abort File and Do No Load; by default, Do Not Load is selected
Saved Grade Exists	Required	Drop-down	Indicates if a saved grade exists; values are Abort File, Do Not Load, and Warning Only; by default, Warning Only is selected
Assessment Item Grade Exists	Required	Drop-down	Indicates if an assessment item grade exists; values are Abort File, Do Not Load, and Warning Only; by default, Warning Only is selected
Grade Invalid	Required	Drop-down	Indicates if a record contains a grade that is not within the grading schema for the Student Unit Attempt; values are Abort File and Do No Load; by default, Do Not Load is selected
Mark-Grade Combination Invalid	Required	Drop-down	Indicates how to handle records with grades within the grading schema that do not relate to the mark range for the mark entered values are Abort File, Do Not Load, and Warning Only; by default, Warning Only is selected
Footer Region			
Grading Period Cohorts		Button	Opens the Grading Period Cohorts window

Table 14–25 Grading Period Cohorts Window Description

Field Name	Type	Features	Description
Grading Period	Default, display only		Grading period
Grading Period Cohorts Region			
[Data Coordination Check box]	Optional	Check box	If selected, data in the Grading Period Cohorts window is automatically refreshed and coordinated with data in the Mark/Grade Entry Configuration window; if deselected, data in the Grading Period Cohorts window is refreshed only when the user clicks in Grading Period Cohorts region. Leave deselected to speed up performance when querying records.
Program Tab			
Program Code	Required	List of values	Program code
Program Title	Display only		Program code title
Unit Set Tab			
Unit Set Code	Required	List of values	Unit set code
Unit Set Title	Display only		Unit set title description
Person ID Group Tab			
Group Code	Required	List of values	Person's group code
Group Description	Display only		Person's group code description
Person ID Group Tab			
Class Standing Code	Required	List of values	Person's class standing code
Class Standing	Display only		Person's class standing description
Academic Standing			
Academic Standing	Required	List of values	Academic standing code

Table 14–25 Grading Period Cohorts Window Description

Field Name	Type	Features	Description
Description	Display only		Academic standing description
Footer Region			
Back		Button	Returns to the Mark/Grade Entry Configuration

14.5.3 Setting Up Incomplete Grade Conversion IGSAS034

The incomplete grade conversion system profile procedure enables users to define the incomplete grade codes for the grading schema.

Incomplete grade codes are defined in the system for each grading schema. In the Enter/View Grades window, users need to submit an incomplete grade and enter the details about how and when the incomplete grade is to be resolved. The Incomplete Grade Conversion System Profile window provides a default profile for this purpose.

Users can define the incomplete grade conversion profile for different grading schema by organization unit. If the organization unit is null, then the profile is for all the organization units for which a profile is not defined. This profile calculates the deadline for the resolution and the default grade upon expiration.

Prerequisites

Grading Schemas IGSAS025

Date Aliases IGSCA006

Organizational Units IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Incomplete Grade Conversion System Profile > Incomplete Grade Conversion System Profile window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–26 Incomplete Grade Conversion System Profile Configuration Window Description

Field Name	Type	Features	Description
Grading Schema	Required	List of values	Grading schema
Version Number	Display only		Value populated based on the selected grading schema
Incomplete Grade Code	Display only		value populated based on the selected grading schema
Organization Unit	Optional	List of values	Organization unit and description; if null, then the profile is valid for the organization units for which a profile is specifically not defined
Completion Requirements Region			
Number of Units	Required		Number of units
Unit of Time	Required	drop-down	Unit of time; values are Week(s) and Day(s)
After Date Alias	Required	List of values	Teaching category data aliases
Default Grade If not Completed	Optional	List of values	Grades for the selected grading schema
Default Mark If not Completed	Optional	Check box	If selected, indicates that default mark unit is not completed within the specified time
Footer Region			
Instructor may Update	Required	Check box	If selected, indicates that instructor can update the grades

14.5.4 Setting Up Anonymous Grading Method IGSAS038

Anonymous grading enables users to substitute students' names on exams for an assignment with numbers to provide for anonymity in the marking or grading process.

Anonymous grading enables students to submit an assessment item without any personally identifying information in order to remove bias from the assessment item grading process and from the unit grading process.

The following topics are described in this section:

- Anonymous Grading Configuration
- Anonymous Grading

Anonymous Grading Configuration

Anonymous grading must be set up in the Anonymous Grading Method window using one of the following types:

- Program Based
- Section Based
- Assessment Based

Program Based

In unit section program anonymous grading, students are assigned an anonymous number to be used for all anonymous assessment items throughout the duration of the student program attempt.

Section Based

In section based anonymous grading, students are assigned an anonymous number by enrolled unit sections to be used for all assessment items and unit grading within that particular unit section.

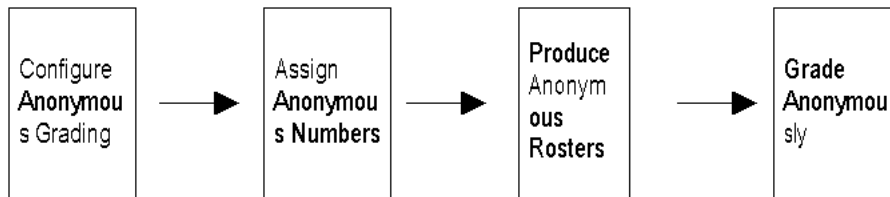
Assessment Based

In assessment based anonymous grading, a student is assigned an anonymous number by assessment item type to be used for all assessment items of that particular type across all enrolled unit sections. The institution can choose an assessment item number assignment for use in unit grading.

Anonymous Grading

Once Student System is configured for anonymous grading and the Enable Anonymous Grading check boxes on the Basic Unit Details, Assessment Types, Unit Assessment Items, and Unit Sections windows are selected, the Maintain Anonymous ID concurrent process is run to generate an anonymous number for each student and stored so that future reporting such as exam rosters can use this number instead of the student's name or ID.

Figure 14–3 shows the process to set up anonymous grading and to grade anonymously.

Figure 14–3 Anonymous Grading Process

Anonymous numbers are assigned using the Maintain Anonymous ID concurrent process. Anonymous ID that are assigned are viewed through View Anonymous IDs self service window. Students are notified of their anonymous number through the Maintain Anonymous ID concurrent process.

Instructors assign grades anonymously in the Enter/Mark Grades window and with the ADI functionality the instructor will be able to upload anonymously grades exams.

The anonymous grading method procedure enables users to configure anonymous grading for a student.

The anonymous grading process substitutes an anonymous number for a student's name, an exam, or assignment, for anonymity in the marking or grading process. The Anonymous Grading Method window configures anonymous grading based on the term, method and unit grading source.

Prerequisites

Assessment Types IGSAS001

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Anonymous Grading Method > Anonymous Grading Method window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–27 Anonymous Grading Method Window Description

Field Name	Type	Features	Description
Term (Load Calendar)	Required	List of values	Student's term calendar
Method	Required	List of values	Student's assessment method
Unit Grading Source (Assessment Type)	Display only		Assessment type unit grading source Note: This field is enabled only if method is Assessment Type.
Description	Display only		Unit grading source description

See also Setting Up Basic Program Details IGSPS013 in Chapter 8, "Program Structure and Planning" for information about the Anonymous Grading check box.

See also Setting Up Unit Sections IGSPS058 in Chapter 8, "Program Structure and Planning" for information about the Anonymous Grading check box.

14.6 Special Consideration for Students

If circumstances beyond a student's control affect the student's ability to complete an assessment item or the result, the student can apply for special assessment consideration. Student System records details of special consideration applications for unit assessment items and the outcomes of those applications.

The Special Consideration Application Details window records applications for special consideration and their outcomes.

14.6.1 Setting Up Special Consideration Categories IGSAS006

Special consideration categories are used in the Special Consideration Application Details window. They describe the grounds on which a student is applying for special consideration and are reviewed by academic officials when considering the application outcome.

The special consideration categories procedure enables users to enter institution-defined special consideration categories.

Special consideration application details can be viewed in the applications for Special Consideration report.

Note: Once a special category is entered, it cannot be deleted and only minor modifications can be carried out.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Special Consideration Category > Special Consideration Categories window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–28 Special Consideration Categories Window Description

Field Name	Type	Features	Description
Special Consideration Category	Required		Name of special consideration category
Description	Required		Description of special consideration category
Closed	Optional	Check box	If selected, prevents modification to special consideration category
Explanation	Required		Special consideration category explanation

14.6.2 Setting Up Special Consideration for Outcomes IGSAS007

Special consideration outcomes are the results sought by the applicant and granted by the institution. They are used in the Special Consideration Application Details window. Application details are included in the Applications for Special Consideration report.

The special consideration outcomes procedure enables user to enter institution-defined special consideration outcomes.

A sought outcome is the preferred outcome of the applicant and is recorded by the person processing the application prior to a decision being made.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Item > Special Consideration Outcomes > Special Consideration Outcomes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–29 Special Consideration Outcomes Window Description

Field Name	Type	Features	Description
Special Consideration Outcome	Required		Special consideration outcome name
Description	Required		Special consideration outcome description
Sought Outcome	Optional	Check box	If selected, indicates the outcome as a special consideration outcome and a sought outcome
Closed	Optional	Check box	If selected, prevents modification of special consideration outcome
Explanation	Required		Explanation of the special consideration outcome

14.7 Examination Timetable

14.7.1 Setting Up Examination Supervisor Types IGSAS002

Use this procedure to enter institution-defined examination supervisor types.

Examination supervisor types are used to categorize supervisors in the Maintain Examination Supervisors window. Examination supervisor types such as chief and assistant provide an indication of the level of responsibility that supervisors can be expected to assume when supervising examinations.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Record > Assessment > Setup > Examination Timetable > Examination Supervisor Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–30 Examination Supervisor Types Window Description

Field Name	Type	Features	Description
Examination Supervisor Type	Required		Type of examination supervisor
Description	Required		Description of the supervisor type
In Charge	Optional	Check box	If selected, indicates that a supervisor type is assigned as in charge
Closed	Optional	Check box	If selected, the examination supervisor type is considered unavailable for future use

14.7.2 Setting Up Venues

See Setting Up Venues IGSAS017 in Chapter 6, "Systemwide Services: Organizational Structure" for information about setting up venues.

14.7.3 Setting Up Venue Session Availability IGSAS019

In the Venue Session Availability window, users can enter availability of examination venues for sessions within a specified examination period. Institutions typically correspond with examination location coordinators to determine the availability of venues within one or more examination periods.

The Venue Session Availability window can also be used to deselect unavailable venues. Many institutions assume that the starting point for all open venues are available for every session within an examination period, unless otherwise advised that specific venues are unavailable for one or more sessions.

Note: The Default Sessions button allocates a particular venue to all sessions within an examination period.

The Default Sessions button is not accessible under the following conditions:

- if the examination period is not specified
- if there are no examination sessions for the examination period
- if the venue code is closed
- if the sessions are already attached
- list of values

Prerequisites

Calendar Types IGSCA002

Dale Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the Globe icon

Expand Locations

Expand your location

Expand your venue locations

Select Venue

Note: For a new venue, you do not need to select an existing venue. You must right click your mouse for a menu and select New.

Click **Venue Session Availability**

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–31 Venue Session Availability Window Description

Field Name	Type	Features	Description
Examination Period Region			
Calendar Type	Display only		Calendar type for the examination period
Description	Display only		Calendar type description
Effective Dates	Display only		Venue session availability start and end date
Calendar Status	Display only		Status of the calendar
Venue Region			
Location Code	Display only		Location code
Description	Display only		Location code description
Venue Code	Display only		Location venue code
Seats	Display only		Number of available seats in venue
Description	Display only		Venue code description
Examination Venue Session Availability Region			
Date Alias	Required	List of values	Date alias
Session Date	Display only		Date of session
Start Time	Display only		Start time of examination
End Time	Display only		End time of examination
Session Number	Display only		Session number
Venue Code	Required	List of values	Venue code
Location Code	Display only		Location code
Seats	Display only		Number of seats
Default Sessions		Button	Creates available records for individual venues for every session
Comments	Optional		Comments

14.7.4 Setting Up Examination Supervisor Details IGSAS020

The examination supervisor details procedure enables users to create examination supervisors and assign them to examination locations.

Supervisors with associated examination locations are further defined in the Supervisors to Venue window. By assigning examination locations to supervisors in this window, users enable:

- the venue validation
- location mismatch warning
- use of the default off campus supervisor procedure in the Supervisors to Venue window

While creating supervisor type for a person known to the system, users must ensure the following:

- not to query if an examination supervisor is not known to the system
- supervisors can be allocated only to locations of type Exam_loc
- supervisors cannot be deleted, if assigned to examination sessions

Note: Examination supervisor types are maintained in the Examination Supervisor Types window. When creating a new supervisor, warnings appear if the person is not a staff member or an active student.

Supervisor record can be created for a person known to the system or unknown to the system.

Prerequisites

Person Details IGSPE034

Examination Supervisor Types IGSAS002

Organizational Units IGSOR030

Locations IGSOR031

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Examination Supervisor Details > Examination Supervisor Details window

Steps

Query and enter data in each field of the window as described in the table. Save your work.

Table 14–32 Examination Supervisor Details Window Description

Field Name	Type	Features	Description
Person Number	Required		Person's number and description
Find Person		Button	Opens Find Person window
Person Details		Button	Opens Person Details window
Sex	Display only		Person's gender
Date of Birth	Display only		Person's date of birth
Supervisor Type	Required	List of values	Indicates the position the supervisor holds in the examination session and description
Organizational Unit	Optional	List of values	Indicates the organizational unit to which the supervisor is responsible, organizational unit description, and date
Sessions At Institution	Display only		Number of sessions a supervisor attended prior to the current date
Sessions at other Institutions	Optional		Number of sessions supervised at other institutions
Comments	Optional		Comments
Examination Supervisor Location Region			
Examination Location Code	Optional	List of values	Examination location code
Description	Display only		Description of location code
Closed	Optional	Check box	If selected, examination location cannot be reopened
Location Type	Display only		Location type and description
Co-ordinator Person Number	Display only		Name of coordinator and description
Mail Delivery Working Days	Display only		Mail delivery working days

14.7.5 Setting Up Examination Sessions IGSAS021

The Examination Sessions window is used to enter examination session details for an examination period. Date alias instances representing each day of the examination period must be created within the examination period in the Date Alias Instances window, or the Date Alias Instances--calendar window before examination sessions are created within an examination period or calendar.

The session number is a secondary identifier for an examination session within the examination timetables subsystem. Session numbers must be sequential and unique within the examination period. If an examination session is added at a later date, the session numbers must be renumbered to maintain the sequence. Once an examination session is used in Oracle Student System, it cannot be deleted.

Once a record is saved, the start time and end time cannot be modified. However, the session can be deleted if it was not used.

Prerequisites

Calendar Types IGSCA002

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Examination Sessions window

Steps

1. Query the appropriate record.
2. Enter data in each field of the window as described in the table. Save your work.

Table 14–33 Examination Sessions Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type for the examination session and description
Calendar Status	Display only		Status of calendar
Effective Dates	Display only		Effective start and end date of examination session

Table 14–33 Examination Sessions Window Description

Field Name	Type	Features	Description
Examination Sessions Region			
Date Alias	Required	List of values	Date alias Note: Only unused examination sessions can be deleted.
Description	Display only		Description of date alias
Start Time	Required	List of values	Start time of examination session
End Time	Required	List of values	End time of examination session
Session Date	Display only		Session date
Session Number	Required		Session number Note: Session numbers must be sequential and unique for each examination period. If users add an examination session to an examination period, users must renumber the sessions so that they are sequential.
Comments	Optional		Comments

14.7.6 Setting Up Supervisors to Venue IGSAS022

The following topics are described in this section:

- Supervisors to Venue
- Examination Session Venue Supervisor
- Examination Instance Supervisor

Supervisors to Venue

The Supervisors to Venue window allocates supervisors to venues within examination sessions. The allocation of supervisors can be undertaken only after the final examination timetable has been produced and loaded into Oracle Student System from the timetabling application.

Supervisors are allocated to a particular session at a particular venue or to one or more examinations during a session at a venue.

Each supervisor has a predefined supervisor type, which may or may not be flagged as In-Charge. Supervisor types are created and maintained in the Examination Supervisor Types window.

More than one in-charge supervisor can be allocated to a venue or examination, in cases in which this role is shared between supervisors.

A supervisor can be automatically allocated to either all sessions at a venue within an examination period or all examination instances at a venue within an examination period.

Examination Session Venue Supervisor

Examination supervisors are allocated to a particular examination session venue. If a person number is inserted or a supervisor from the list of values selected, the supervisor's Default Supervisor Type is inherited from the Typical Supervisor Type but can be overridden for the session venue. The In-Charge check box shows whether or not the supervisor is in charge. This defaults according to the supervisor's Supervisor Type. The Override Start Time and Override End Time fields are used to indicate the supervisor's attendance time at the examination session venue. The supervisor start and end times are inherited from the session start and end times unless override start and end times are entered. Override start and end times can be used to limit supervisors to attendance for only part of a session if standard start and end times do not apply.

The number of supervisors assigned to the examination session venue is validated by the supervisor limit in the Venues window. Warnings are displayed under the following conditions:

- The supervisor is assigned to a session and the venue is not within the supervisor's recorded examination location.
- The supervisor is allocated to another location on the same day.
- The supervisor is already allocated to supervise at a different venue within the session.
- The person does not have supervisor type In Charge.
- An in-charge supervisor is already nominated for the venue session.
- The person is an active student.
- The person is not a staff member.
- The supervisor limit for the venue was exceeded.

An error validation is displayed if a supervisor is assigned a closed examination supervisor type.

Examination Instance Supervisor

Examination supervisors can be allocated to one or more particular examinations within the session venue. If a person number is inserted or a supervisor from the list of values is selected, the supervisor's Default Supervisor Type is inherited from the Normal Supervisor Type but can be overridden for the session venue. The In Charge check box shows if the supervisor is in charge. This defaults to the supervisor's supervisor type. User select the assessment ID for the examination session venue, which is the particular examination to which the supervisor is allocated. The Override Start Time and Override End Time fields limit the supervisor's attendance time at the examination session venue. The supervisor's start and end times are inherited from the session start and end times, unless override start and end times are entered. Override start and end times can be used to limit supervisors to attendance for only part of the examination session if standard start and end times do not apply.

The number of supervisors assigned to the examination session venue is validated by the supervisor limit in the Venues window. Warnings are displayed under the following conditions:

- The supervisor is assigned to a session and the venue is not within the supervisor's recorded examination location.
- The supervisor is allocated to another location on the same day.
- The supervisor is already allocated to supervise at a different venue within the session.
- The person does not have supervisor type In Charge.
- An in-charge supervisor is already nominated for the venue session.
- The person is an active student.
- The person is not a staff member.
- The supervisor limit for the venue was exceeded.

An error validation is displayed if a supervisor is assigned a closed examination supervisor type.

Prerequisites

Person Details IGSPE034

Examination Supervisor Types IGSAS002

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Supervisors to Venue window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 14–34 Supervisors to Venue Window Description

Field Name	Type	Features	Description
Calendar Type	Display only		Calendar type
Calendar Status	Display only		Calendar status
Effective Dates	Display only		Effective start and end dates
Default Supervisor		Button	Opens the Default Supervisor region
Default Off Campus Supervisor		Button	Opens the Default Off Campus Supervisor region
Default Supervisor Region			
Person Number	Optional	List of values	Person’s number and name
Examination Instance	Optional	Check box	If selected, allocates the supervisor to all examination instances for all sessions at the venue Note: If the supervisor should not be allocated to all examination instances, delete those that are not applicable after running the default supervisor process.
Examination Venue	Optional	Check box	If selected, allocates the supervisor to all examination sessions at the venue Note: If the supervisor should not be allocated to all sessions, delete those that are not applicable after running the default supervisor process.

Table 14–34 Supervisors to Venue Window Description

Field Name	Type	Features	Description
Ignore Warnings	Optional	Check box	If selected, suppresses any warning messages and ignores failed validations For example, if the specified venue is not associated with the supervisor's nominated examination locations, the process ignores the warning validation and allocates the supervisor to the venue. A general warning message is displayed to indicate if any warning validations were encountered during the process. These must be resolved after running the default process.
Supervisor Type	Optional	List of values	Supervisor type and description
In Charge	Optional	Check box	If selected, indicates that the selected person is the supervisor Note: This defaults according to the supervisor type chosen. If not selected, the supervisor's predefined supervisor type is used.
Venue code	Optional	List of values	Venue code and description
OK		Button	Runs the default supervisor process
Cancel		Button	Cancels the default supervisor
Default Off Campus Supervisor Region			
Examination Instance	Optional	Check box	If selected, allocates the supervisor to default off campus examination instances for all sessions at the venue
Examination Venue	Optional	Check box	If selected, allocates the supervisor to all examination sessions at the venue
Ignore Warnings	Optional	Check box	If selected, suppresses any warning messages and ignores failed validations
OK		Button	Runs the default process and returns to the main window
Cancel		Button	Cancels the selections and returns to the main window
Examination Session Venue Region			

Table 14–34 Supervisors to Venue Window Description

Field Name	Type	Features	Description
Session Date	Display only		Examination session date
Start Time	Display only		Examination start times
End Time	Display only		Examination
Session Number	Display only		Examination session number
Examination Location Code	Display only		Examination location code
Venue Code	Display only		Examination venue code
Description	Display only		Examination session venue description
Venue Examination Supervisor > Obsoleted		Button	Opens the Examination Session Venue Supervisor region
Instance Examination Supervisor > Obsoleted		Button	Opens the Examination Instance Supervisor region
Examination Session Venue Supervisor Region			
Person Number	Required	List of values	Person's number
Name	Display only		Person's name
Supervisor Type	Required	List of values	Supervisor type
In Charge	Optional	Check box	If selected, indicates that the selected person is the supervisor
Supervisor Type Description	Display only		Supervisor type description
Effective Time	Optional	Calendar	Effective start and end time
Examination Instance Supervisor Region			
Person Number	Required	List of values	Person's number
Name	Display only		Person's name

Table 14–34 Supervisors to Venue Window Description

Field Name	Type	Features	Description
Supervisor Type	Required	List of values	Supervisor type
In Charge	Optional	Check box	If selected, indicates that the selected person is the supervisor
Supervisor Type Description	Display only		Supervisor type description
Assessment ID	Required	List of values	Assessment ID
Description	Display only		Assessment description
Start Override Time	Optional		Override start time can be used to limit supervisors to attendance for only part of a session if standard start time do not apply
Override End Time	Optional		Override end time can be used to limit supervisors to attendance for only part of a session if standard end time do not apply

Records: Progression

15.1 Progression Configuration

Academic and administrative staff use the Progression subsystem to evaluate students' academic progress, to apply outcomes which may involve holds, and to determine the student's progression status.

The Progression subsystem also has the ability to produce positive outcomes such as awards and can allow specific groups of students to be targeted by progression rules.

Progression rules are created and used to evaluate students' academic progress. The timing of progression measurement within an institution and the consequences if a student fails to progress must be decided.

The Progression Outcome Types window enables users to define institution-defined progression outcome types that are mapped to system progression rule outcome types. Progression Outcome types may also be mapped to a hold type. If a progression outcome type is mapped to a hold type, this hold represents the penalty that applies to a student who fails a progression rule.

All progression rules result in true or false. Rules can be applied at a number of levels within a defined hierarchy. This hierarchy includes the following:

- student program attempt
- program version
- organizational unit
- program type

Student program attempt is the highest level in the hierarchy and program type is the lowest.

A rule defined at the program version level will override a rule of the same rule category defined at the organizational unit level.

The Progression Rule Categories window enables users to define institution-defined progression rule categories. Progression rule categories are mapped to system rule call codes. System progression rules are organized into rule groups. These rule groups determine the rules the user chooses from when defining a progression rule. This window also enables users to create progression calendars and outcomes that are inherited by the progression rules that are defined for a rule category. Progression rules of the same progression rule category can be defined at different levels within the hierarchy. Rules defined at a higher level in the hierarchy override rules of the same category defined at lower levels.

The Progression Rule Applications window enables users to create progression rule applications by using an existing progression rule as defined by the Progression Rule Categories window or by defining a specific rule for this application by clicking **Edit Rule**. A progression rule application consists of the following:

- rule
- calendar
- outcome

Progression calendars and outcomes can be part of the progression rule application or they can be inherited from the Progression Rule Category window or Progression Rule window if they have been defined in those windows.

The Student Progression Rule Check window enables users to run the rule application process. Users can click **Manual Rule Check** on this window or run the concurrent process to create the student progression rule check and student progression outcome records.

The Progression Rule Outcome window enables users to define a progression rule and its associated outcome by clicking **Outcome Rule**. This progression rule and outcome can be applied to a student in subsequent periods.

The Progression Outcome Decision window enables users to approve or waive large numbers of student progression outcome records and to apply any outcome effects.

The Student Progression Outcome window enables users to edit records created through the rule application process by using the details from the progression outcome records or create records manually.

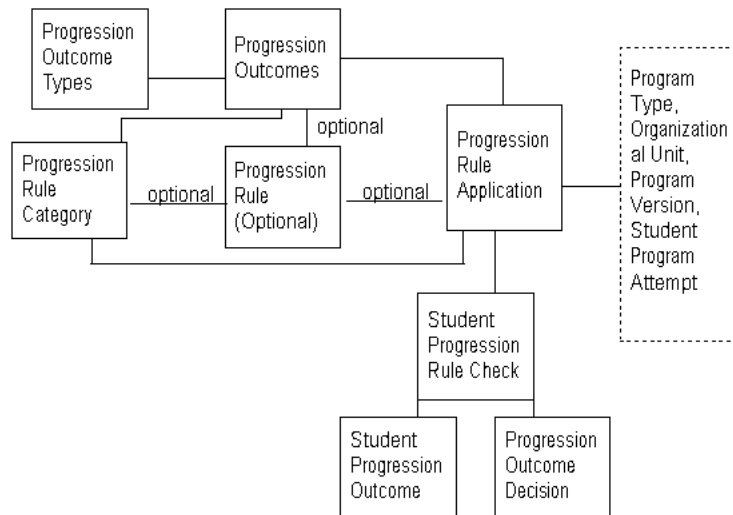
The following topics are described in Figure 15-1:

- progression outcome types

- progression outcomes
- progression rule category
- progression rule
- progression rule application
- student progression rule check
- organizational unit
- program type
- program version
- student progression outcome
- progression outcome decision

Figure 15–1 shows the process by which progression rules are created and applied to students.

Figure 15–1 Progression Process



At the time determined by the institution, typically at the end of the term, a determination of the student's academic progress is made. This determination is based on user-defined rules that apply measures such as grade point average, weighted average marks, credit points attempted and earned, specific unit failure

and other measures. Prior progression period outcomes can also factor into the evaluation of the student's academic progress.

Honors can be awarded at the end of each progression period, then of a program stage, or at graduation. Institutions can define progression rules to identify students who perform well and the associate positive outcomes with those rules.

15.1.1 Setting Up System Progression Configuration IGSPR002

Progression must be configured at a system-wide level to establish the default progression fields for the whole institution. This procedure can be used to establish and maintain the default configuration fields.

In the Progression subsystem, critical dates must be specified to establish the default progression application cycle. These apply to the whole institution unless they are overridden. Institutions can define the names for these date alias types. The System Progression Configuration window is used to enter the required institution-defined date alias types against the system date names, which enables their recognition by Oracle Student System. The definition of date alias types and the allocation of actual values to them are entered in the Calendar functionality.

It is also critical that calendar types, applicable at the system level, are specified. This is done in the overlay window. Progression rules within a calendar are considered only if the system configuration or the override configuration specifies that a progression calendar type is a recognized progression period in the system.

Other fields are also established at a system-wide level in this window. These fields control the consequences after failure of a progression rule, such as the availability of an appeal period or the timing of outcomes application related to the rule failure.

The system-wide configuration established in this window can be overridden for specified organizational units in the Organizational Unit Progression Configurations window or specified program versions in the Program Version Progression Configurations window.

The system progression configuration procedure includes the specification of the progression calendars set. The set of progression calendars that applies across the whole institution is specified in this window.

The Show Cause or Appeal check boxes must be selected if a show cause and appeal period is to be available at the institution at any level. Show Cause and Appeal check boxes must be selected at this system level to enable their configuration at either an organizational unit level in the Organizational Unit Progression Configurations window or at the program version level in the Program Version Progression Configurations window.

When the Calculate Weighted Average Mark and Calculate Grade Point Average check boxes are selected, users can calculate, store, and display a weighted average mark or grade point average value for all student program attempts, as required.

In the System Progression Calendar region, a stream number represents a logical sequence of progression periods. For example, progression calendars that represent semesters are logically a different sequence from an annual calendar. Therefore, a stream number of 1 could be entered for both semester calendars, but the annual calendar type would require a different stream number, such as 2.

Streams are important as they are used to determine if a student has failed the same progression rule more than once and if they have failed it on consecutive occasions.

Calendar types for use in this window are created in the Calendar Types window. Only calendar types with a calendar category of Progress can be entered.

Note: A stream number must be entered against each calendar type.

Prerequisites

Calendar Types IGSCA002

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > System Progression Configuration > System Progression Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 15–1 System Progression Configuration Window Description

Field Name	Type	Features	Description
Effective End Date Alias	Required	List of values	Represents the end of a progression period. Any student unit attempt results recorded prior to this date contribute to that progression period
Apply Start Date Alias	Required	List of values	A date alias to represent the date on which the automatic process of checking students against progression rules can begin in a progression period
Apply End Date Alias	Required	List of values	Date alias to represent the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only TODO entries are checked
End Benefit Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to GOODSTAND
End Penalty Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically
Hold End Date Alias	Required	List of values	Represents the expiry date for holds, due to expire within the related progression period. A date alias must be nominated to represent this, in the system-wide progression configuration. Where an hold end date alias does not exist, the calendar end date is used
Outcome Check Type	Required	Drop-down list	Valid outcome check type: Finalized, Recommended, and Missing
Show Cause Region			

Table 15–1 System Progression Configuration Window Description

Field Name	Type	Features	Description
Show Cause	Optional	Check box	If selected, value for Show Cause Cut Off Date Alias field can be specified
Show Cause Cut Off Date Alias	Optional	List of values	If selected, specifies the date by which any show cause period must end and description Note: A value can be selected only if the Show Cause box is selected.
Apply Outcome Before Show Cause	Optional	Check box	If selected, indicates if application of outcomes is required before the show cause period
Appeal Region			
Appeal	Optional	Check box	If selected, value for Appeal Cut Off Date Alias field can be specified
Appeal Cut Off Date Alias	Optional	List of values	Date by which any appeal period must end and description Note: A value can be selected only if the Appeal check box is selected.
Apply Outcome Before Appeal	Optional	Check box	Selected by default; if deselected, indicates outcome is applied after the appeal period
Count Suspension In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time
Calculate Weighted Average Mark	Optional	Check box	If selected the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Count Exclusion In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are included in the calculation of elapsed time
Calculate Grade Point Average	Optional	Check box	If selected the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Progression Calendars		Button	Opens System Progression Calendar region
System Progression Calendar Region			
Progression Calendar Type	Required		Progression calendar type

Table 15–1 System Progression Configuration Window Description

Field Name	Type	Features	Description
Description	Display only		Calendar type description
Stream Number	Required		Number represents a logical sequence of progression periods Note: A stream number must be entered against each calendar type.
Cause Length	Optional		Numeric value representing the number of cause show days
Appeal Length	Optional		Numeric value representing the number of appeal days
Back		Button	Closes System Progression Calendar region

15.1.2 Setting Up Program Version Progression Configuration IGSPR003

The program version progression configurations procedure enables users to configure and maintain Progression functionality for a nominated program version.

The default or system-wide configuration Progression is overridden to meet the needs of a particular program version. In the application of progression rules, the configuration defined for a program version takes precedence over student program attempts within that program.

If the Progression functionality is not configured at a program version level, the system-wide fields in the System Progression Configuration window, or organizational unit fields in the Organizational Unit Progression Configurations window, are used in determining the functioning of progression. The Program Version Progression Configurations window is used to establish and maintain the configuration fields for a specified program version.

In Progression, critical dates must be specified to establish the progression application cycle. To configure progression for a program version, each of these critical dates must have a date alias type assigned. To configure progression at a program version level, all configuration fields must be specified. Those selected can be date alias types defined specifically for the program version or date alias types that have been defined and used at other progression configuration levels.

The Program Version Progression Configurations window enables the required institution-defined date alias types to be entered against the system date names. The definition of date alias types and actual values allocated to them are entered in the Calendar functionality. Date alias types for use in this window are created in the

Date Aliases window. To delete a program version progression configuration, all links to progression calendars must be deleted first.

Note: Only program versions set as Active can be configured.

The progression calendar types used by the program version are specified in the window. Progression rules within a calendar are evaluated for student program attempts under this program only if this configuration specifies that a progression calendar type is a recognized progression period for this program version. Calendar types used in this window are created in the Calendar Types window. Only calendar types with a calendar category of Progress can be entered. A stream number must be entered against each calendar type.

Other fields are also established for the program version in this window. These fields control the consequences after failure of a progression rule, such as the availability of an appeal period or the timing of application of outcomes related to the rule failure.

The program version configuration established in this window overrides progression configuration for the parent organizational unit, if it has been configured, and the system-wide default configuration.

The program version progression configurations procedure is structured through the Program Version and System Program Version Progression Configuration regions.

The required program in the Program Version region is retrieved with a query. Entering just the program code retrieves all versions. Entering the program code and version number retrieves a specified version.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > Program Version Progression Configuration window

Steps

1. Query the appropriate record.

2. Enter data in each field of the window as described in the table. Save your work.

Table 15–2 Program Version Progression Configurations Window Description

Field Name	Type	Features	Description
Program Version Region			
Program Code	Display only		Program code
Version Number	Display only		Program code version
Short Title	Display only		Program code short description
Program Status	Display only		Program status
System Program Version Progression Configuration Region			
Apply Start Date Alias	Required	List of values	A date alias to represent the date on which the automatic process of checking students against progression rules can begin in a progression period
Apply End Date Alias	Required	List of values	Date alias to represent the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only TODO entries are checked
End Benefit Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to GOODSTAND
End Penalty Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically
Outcome Check Type	Required	Drop-down list	Outcome check type: Finalized, commended, or Missing

Table 15–2 Program Version Progression Configurations Window Description

Field Name	Type	Features	Description
Show Cause Region			
Show Cause	Optional	Check box	If selected, value for Show Cause Cut Off Date Alias field can be specified
Apply Outcome Before Show Cause	Optional	Check box	If selected, indicates if application of outcome is required before the show cause period
Show Cause Cut Off Date Alias	Optional	List of values	If selected, specifies date by which any show cause period must end and description Note: A value can be selected only if the Show Cause box is selected.
Appeal Region			
Appeal	Optional	Check box	If selected, value for Appeal Cut Off Date Alias field can be specified
Apply Outcome Before Appeal	Optional	Check box	Selected by default; if deselected, indicates outcome is applied before appeal period
Appeal Cut Off Date Alias	Optional	List of values	If selected, specifies date by which any appeal period must end and description Note: A value can be selected only if the Appeal check box is selected.
Count Suspension In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time
Calculate Grade Point Average	Optional	Check box	If selected the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Count Exclusion In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are included in the calculation of elapsed time
Calculate Weighted Average Mark	Optional	Check box	If selected the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Progression Calendars		Button	Opens System Program Version Progression Calendar region
System Program Version Progression Calendar Region			

Table 15–2 Program Version Progression Configurations Window Description

Field Name	Type	Features	Description
Progression Calendar Type	Required		Progression calendar type
Description	Required		Calendar type description
Stream Number	Required		Number represents a logical sequence of progression periods
Cause Length	Optional		Numeric value representing the number of cause days
Appeal Length	Optional		Numeric value representing the number of appeal days
Back		Button	Closes System Program Version Progression Calendar region

15.1.3 Setting Up Progression Outcome Types IGSPR008

The progression outcome types procedure enables users to maintain a set of institution-defined progression outcome types. Each institution-defined progression rule can have an outcome type, or multiple outcome types, associated with them.

An institution-defined progression outcome type must be mapped to a system progression rule outcome type. When an outcome, entered against a student program attempt, is approved, the system-defined outcome type can trigger changes to the progression status of the student program attempt.

For example, when a student fails a progression rule with the system-defined outcome type of Suspension and this outcome has been approved by the relevant academic committee, the student’s progression status becomes Suspension. The impact of each approved outcome type on a student’s progression status is described in the table below.

A progression outcome can also be mapped to a hold type. These holds represent the penalty that applies to a student who fails a progression rule, with the associated outcome type.

Table 15–3 System Progression Outcome Types

System Progression Rule Outcome Type	Suggested Use	Allowable hold Types and Effect Types	Progression Status When Outcome is Approved
Degree Award	Used for special awards such as Dean's List honors	No hold type can be set for any outcome type mapped to this system type	No effect on status
Advance	UK Specific. Used to indicate that student should advance to next Year of Program (YOP)	No hold type can be set for any outcome type mapped to this system type	No effect on status
Repeat Year	UK Specific. Used to indicate that student should repeat the current Year of Program (YOP)	No hold type can be set for any outcome type mapped to this system type	No effect on status
Expulsion	Used for expulsion from the institution, as represented by a program group	A hold type with a hold effect type of Exclusion must be defined for an outcome of this type.	Expulsion
Exclusion	Used to exclude a student from a program group, program, unit set, or unit	A hold type with a hold effect type of Exclusion must be specified.	Exclusion
Suspension	Used when suspension from a program is the result of a progression rule failure	A hold type with a hold effect type of Suspension must be specified.	Suspension

Table 15–3 System Progression Outcome Types

System Progression Rule Outcome Type	Suggested Use	Allowable hold Types and Effect Types	Progression Status When Outcome is Approved
No Penalty	Used when an institution requires a warning with no associated penalty for a progression rule failure	No hold type can be set for any outcome type mapped to this system outcome type.	No effect on status
Probation	If an outcome is to result in some type of restriction or requirement placed on the student's enrollment	A hold type must be specified. This hold must have one of the following hold effect types: restricted attendance type, restriction on enrollment to greater than, less than, or equal to given number of credit points, required enrollment in specified unit.	Probation
Manual	Used when the outcome is to be applied manually	No hold type can be set for any outcome type mapped to this system type.	No effect on status

Prerequisites

Person Hold Types IGSEN042

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > Progression Outcome Types

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 15–4 Progression Outcome Types Window Description

Field Name	Type	Features	Description
Progression Rule Outcome Type	Required		type of progression rule outcome Note: Each progression rule outcome type must be unique and once used in Student System cannot be deleted.
Description	Required		description of progression rule outcome type
System Progression Rule Outcome Type	Required	List of values	seeded outcome types related to the seeded progression status values in academic standing and can be related to specified system hold types
Positive Outcome	Display only	Check box	If selected, indicates that system progression outcome type is Award Note: This check box is automatically updated based on the rule category.
Closed	Optional	Check box	If selected, indicates that the progression outcome type is no longer available for selection in the Progression Rule Outcomes and Student Progression Outcome windows
Hold Type	Optional	List of values	user-defined outcome types are linked to user-defined hold types that determine the hold effects to be created when this outcome is applied to a student Note: Only Academic hold types can be linked to progression rule outcome type. Note: Hold type and system progression rule outcome type cannot be modified, if the current outcomes or hold linked to this progression rule outcome type exist.
Default Restricted Enrollment Credit Points	Optional		enabled only if the hold type chosen has system hold types which restricts the number of enrolled credit points
Default Restricted Attendance Type	Optional	List of values	enabled only if the hold type chosen has system hold types which restricts the attendance type and the student can effectively enroll the number of credit points as defined by the attendance type specified
Comments	Optional		explanation
Hold Type		Button	Opens the Person Hold Types window

15.1.4 Organizational Unit Progression Configurations

Progression must be configured at a system-wide level to establish the default progression fields for the entire institution

In Progression, critical dates must be specified to establish the default progression application cycle. These apply to the whole institution unless they are overridden. Institutions can define the names for these date alias types.

Organizations can override default or system-wide configuration for the Progression functionality. Configurations are used to apply progression rules for student program attempts within the organizational unit. Organizational unit configurations take precedence over system-wide configurations set in the System Progression Configuration window or program version configurations set in the Program Version Progression Configurations window.

Users can set organizational unit configurations as follows:

1. Users define date alias types and values in Calendar.
2. In Progression, users specify critical dates to establish the progression application cycle.
3. To configure the progression for an organizational unit, users enter the required institution-defined date alias types against the system date names in the Organizational Unit Progression Configurations window.

Note: Users can select date alias types defined specifically for the organizational unit or date alias types define and used at other progression configuration levels.

Progression rules within a calendar are evaluated for student program attempts under an organizational unit only if the configuration specifies that a progression calendar type is a recognized progression period for that organizational unit.

Users can also specify the consequences of failure of a progression rule such as the availability of an appeal period or the timing of application of outcomes related to the rule failure.

Users can override the organizational unit configuration established in this window for specified program versions offered by this organizational unit in the Program Version Progression Configurations window.

To configure progression at an organizational unit level, all configuration fields must be specified. To delete an organizational unit progression configuration, all links to progression calendars must first be deleted. To maintain organizational unit

progression configurations, users must include the specifications of the set of progression calendars that apply at the organizational unit level.

Note: Only organizational units set as Active can be configured.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > Organization Unit Progression Configuration window

Steps

1. Query the appropriate record.
2. Enter data in each field of the window as described in the Organization Unit Progression Configuration Window table.
3. Click Progression Calendars.
The System Organizational Unit Progression Calendar window appears.
4. Enter data in each field of the window as described in the System Organizational Unit Progression Calendar table. Save your work.

Table 15–5 Organizational Unit Progression Configurations Window Description

Field Name	Type	Features	Description
Organizational Unit Region			
Unit Code	Display only		Unit code
Start Date	Display only		Program code start date
Description	Display only		Program code short description
Status	Display only		Organization unit code status
System Organizational Unit Progression Configuration Region			

Table 15–5 Organizational Unit Progression Configurations Window Description

Field Name	Type	Features	Description
Apply Start Date Alias	Required	List of values	A date alias to represent the date on which the automatic process of checking students against progression rules can begin in a progression period
Apply End Date Alias	Required	List of values	Date alias to represent the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only TODO entries are checked
End Benefit Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to GOODSTAND
End Penalty Date Alias	Required	List of values	This date alias represents the final date, by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically
Outcome Check Type	Required	Drop-down list	Outcome check type; valid values are: Finalized, Recommended, or Missing
Show Cause Region			
Show Cause	Optional	Check box	If selected, value for Show Cause Cut Off Date Alias field can be specified
Apply Outcome Before Show Cause	Optional	Check box	If selected, indicates if application of outcome is required before the show cause period
Show Cause Cut Off Date Alias	Optional	List of values	If selected, specifies the date by which any show cause period must end and description Note: A value can be selected only if the Show Cause check box is selected.
Appeal Region			
Appeal	Optional	Check box	If selected, value for Appeal Cut Off Date Aliases field can be specified

Table 15–5 Organizational Unit Progression Configurations Window Description

Field Name	Type	Features	Description
Apply Outcome Before Appeal	Optional	Check box	Selected by default; if deselected, indicates the outcome is applied before the appeal period
Appeal Cut Off Date Aliases	Optional	List of values	If selected, specifies the date by which any appeal period must end and description Note: A value can be selected only if the Appeal check box is selected.
Footer Region			
Count Suspension In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time
Calculate Grade Point Average	Optional	Check box	If selected the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Count Exclusion In Time	Optional	Check box	If selected, outcomes resulting from failure of a progression rule are included in the calculation of elapsed time
Calculate Weighted Average Mark	Optional	Check box	If selected the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed
Progression Calendars		Button	Opens the System Organizational Unit Progression Calendar Window

Table 15–6 System Organizational Unit Progression Calendar Window Description

Field Name	Type	Features	Description
Progression Calendar Type	Required	List of values	Progression calendar type
Description	Display only		Calendar type description
Stream Number	Required		Number representing a logical sequence of progression periods

Table 15–6 System Organizational Unit Progression Calendar Window Description

Field Name	Type	Features	Description
Cause Length	Optional		Numeric value representing the number of cause days
Appeal Length	Optional		Numeric value representing the number of appeal days
Back		Button	Returns to Organizational Unit Progression Configurations window

15.1.5 Setting Up Progression Rule Categories IGSPR001

The progression rule categories procedure enables users to enter institution-defined progression rule categories and map each category to a system rule call code.

Users can create institution-defined rule categories that are used to group the progression rules of the institution. These categories may be used to differentiate between functionality such as Financial Aid Satisfactory Academic Progress, Dean’s List Awards and Honors or Academic Standing rules.

The use of different categories also ensures that, when applied, a progression rule is not unintentionally overridden by another rule specified at a different level in the rule application hierarchy.

The progression rule category mapped to an institution-defined rule category ensures that when the Rule window is used to build rules, only the rule options relevant to this progression measure are available.

More than one institution-defined rule category can be mapped to a single system rule call code. This provides flexibility in the application of rules within the category and limits unintentional overriding at different application levels. A rule category, even when it has associated calendars and outcomes, does not initiate progression checking until it is assigned to a progression application element. For example, program type, organizational unit, program version, or student program attempt.

Progression calendars and outcomes can be assigned to a progression rule category. This means that in the application of all progression rules within a category, the assigned outcomes and progression periods or dates, as identified through the selected calendars, are used by default. These default progression periods and outcomes can be overridden at the following levels:

- individual rule level, within the category, using the Progression Rules window
- rule application level, using the Progression Outcome Types window

For example, the majority of programs offered at an institution require students to pass one or more specific units in their first year. These units vary from program to program, but the progression outcome of failing one of these units is always on probation. The institution may establish a rule category of Dsgn-ufail and assign the progression outcome of Probation to the category.

An application-specific rule for a program version can be created at the rule application level using this rule category. The application does not need an outcome defined since the probation outcome is inherited from this rule category level.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > Progression Rule Category > Progression Rule Category

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 15–7 Progression Rule Categories Window Description

Field Name	Type	Features	Description
Rule Category	Required	List of values	Short name of progression rules as defined by the institution Note: Once used in the system, obsolete rule categories must be closed and not deleted.
System Rule Call Code	Required		System rule call code
Description	Required		Rule category description
Positive Rule	Optional	Check box	If selected, indicates rules in the category view and positive outcome
Closed	Optional	Check box	If selected, rule category is no longer valid for use
Progression Rule Calendar Region			

Table 15–7 Progression Rule Categories Window Description

Field Name	Type	Features	Description
Calendar Type	Optional	List of values	Type of calendar Note: Calendars must be associated with rules, as calendar can be set at server level.
Start Period	Optional	List of values	Date progression rules in category are effective, if other then start date of progression calendar
End Period	Optional	List of values	Period to phase out a defined rule category against the assigned rule category calendar
Student Start Period	Optional		Number that identifies rule category is applied to student
Applications	Optional		Number of times any rule within the category can be applied to a student unless overridden at a rule or rule application level
Back		Button	Returns to the Progression Rule Categories window
Progression Outcomes		Button	Opens the Progression Rule Outcome window
Rule Summary		Button	Opens the Progression Rule Summary window

15.2 Setting Up Progression Rules IGSPR006

This set up is only necessary if an institution has several rules with associated progression outcomes and calendars which may need to be applied for several different program types, organizational units, program version or student unit attempts. Progression rules can be set up here with progression outcomes and calendars if required and then used in several different Progression Rule Applications. This gives the institution the option of having some standard progression rules, outcomes and calendars which can be maintained in a single place, but can be applied in numerous places across the system.

Prerequisites

Progression Rule Categories IGSPR001

Calendar Types IGSCA002

Progression Outcome Types IGSPR008

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression > Progression Rules

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 15–8 Progression Rule Window Description

Field Name	Type	Features	Description
Rule Category	Required	List of values	Short name of progression rules as defined by the institution Note: Once used in the system, obsolete rule categories must be closed and not deleted.
Description	Required		Rule category description
Positive Rule	Display only	Check box	If selected, indicates rules in the category view and positive outcome
Closed	Optional	Check box	If selected, rule category is no longer valid for use
Edit Rule		Button	Opens the Rule window
[Data Coordination Check box]	Optional	Check box	If selected, data in the footer region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Rule Text field in the footer region. Select to speed up performance when querying records.
Rule Text	Required		Rule text associated with a rule
Message	Optional		Message associated with the rule category
Progression Calendars		Button	Opens Progression Rule Calendar region
Progression Rule Calendar Region			
Calendar Type	Optional	List of values	Type of calendar Note: Calendars must be associated with rules, as calendar can be set at server level.
Start Period	Optional	List of values	Date progression rules in category are effective, if other then start date of progression calendar
End Period	Optional	List of values	Period to phase out a defined rule category against the assigned rule category calendar

Table 15–8 Progression Rule Window Description

Field Name	Type	Features	Description
Student Start Period	Optional		Number that identifies rule category is applied to student
Applications	Optional		Number of times any rule within the category can be applied to a student unless overridden at a rule or rule application level
Back		Button	Returns to the Progression Rule Categories window
Progression Outcomes		Button	Opens the Progression Rule Outcome window
Rule Summary		Button	Opens the Progression Rule Summary window

15.3 Setting Up Progression Rule Applications IGSPR007

The Progression Rule Application is the key setup for Progression. The Progression Rule Application is made up of for key components:

- progression rule
- optional student identifiers
- progression calendars
- progression outcomes

The progression rule is the progress measure which the student is to be tested against. When this rule is evaluated to be true an outcome will be created against the student. For example a negative rule such as Academic Progress the rule could be Cumulative STANDARD with GPA less than 2.00. For a positive rule such as Dean's List for example the rule could be Cumulative STANDARD with GPA more than 3.75. The progression rule can be created here using the Edit Rule button or will be inherited from the user defined Progression Rule if one is used.

The progression Rule application includes several student identifiers to target particular groups of students within the existing context these are:

- Attendance Type
- Minimum Credit Points
- Maximum Credit Points
- Class Standing

For example, an institution could set up its progression rules at the Program Type level for Undergraduate and use the Class Standing to further target groups of students who are Freshman, Sophomores, Juniors or Seniors.

Progression Calendars are used to determine when and how many times a student will be evaluated against the progression. The progression calendars may be inherited by the Progression Rule Application from either the Progression Rule Category or Progression Rule if they have been defined there. Inherited Progression Calendars are overridden when a Progression Calendar is defined for the Progression Rule Application.

Progression Outcomes are the punishments or rewards which will result from the progression rule evaluating to true. The details in the Progression Outcomes are used by the progression rule application process to create Student Progression Outcomes. The progression outcomes may be inherited by the Progression Rule Application from either the Progression Rule Category or Progression Rule if they have been defined there. Inherited Progression Outcomes are overridden when a Progression Outcome is defined for the Progression Rule Application.

The Rule Summary button navigates to a screen which displays all of the components of the Progression Rule Application and where they are inherited from.

Progression rules can be applied at a number of levels within a hierarchy. These levels are:

- Program Type
- Organizational Unit
- Program Version
- Student Program Attempt

For a user to create a Progression Rule Application at a particular level they must navigate to the Progression Rule Application window in the appropriate context. For example if a user wished to set up a Progression Rule Application for a particular Program Type they must navigate to the Program Type window in Program Structure and Planning. Find the program type they are looking for and then navigate to the Progression Rule Application window by clicking the Progression Rules button.

<Context> Region

The <Context> region is configured dynamically based on how the Progression Rule Application window is accessed. Appropriate context details will be displayed in this region for each of the different places this window can be accessed from.

Data displayed in this region cannot be modified. For example, if accessed from the Program Type window this region is labelled Program Type and the appropriate Program Type details are displayed.

Prerequisites

Calendar Types IGSCA002

Progression Outcome Types IGSPR008

Basic Program Details IGSPS013

Basic Unit Set Details IGSPS065

Basic Unit Details IGSPS047

Progression Rule Categories IGSPR001

Attendance Types IGSPS006

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Program Types > Progression Rules button

or

Program Structure and Planning > Basic Program Details > Progression Rules button

or

Setups > Organizational Structure > Organizational Structure Setup > Progression Rules button

or

Enrollments > Student Enrollments > Program Attempts button > Progression Rules button

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 15–9 Progression Rule Application Window Description

Field Name	Type	Features	Description
Rule Category	Required	List of values	Rule category
Rule Code	Optional		Rule code
Description	Display only		Rule code description
Positive Rule	Default, display only	Check box	If selected, indicates that positive rules have positive outcomes
Attendance Type	Optional	List of values	The Attendance Type a student must have for this progression rule application to be evaluated against them
Min CP	Optional		The Minimum number of Credit Points a student must have for this progression rule application to be evaluated against them
Max CP	Optional		The Maximum number of Credit Points a student must have for this progression rule application to be evaluated against them
Class Standing	Optional	List of values	The Class Standing value a student must have for this progression rule application to be evaluated against them
Edit Rule		Button	Opens the Rule window
[Data Coordination Check Box]	Optional	Check box	If selected, data in the footer region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Rule Text field in the footer region. Select to speed up performance when querying records.
Rule Text	Optional		Rule text associated with rule
Message	Optional		Describes context rule that applies to progression periods and outcomes linked to the rule
Progression Calendars		Button	Displays Progression Rule Calendar region
Progressions Outcomes		Button	Opens the Progression Rule Outcome window
Rule Summary		Button	Opens the Progression Rule Summary window

Table 15–9 Progression Rule Application Window Description

Field Name	Type	Features	Description
Progression Rule Calendar Region			
Calendar Type	Required	List of values	Calendar type
Start Period	Optional	List of values	Period start date for a progression calendar
End Period	Optional	List of values	Period to phase out a defined rule against the assigned rule calendar
Student Start Period	Optional		Number of items the rule can be used against a student
Applications	Optional		Number of times any rule within the category can be applied to a student unless overridden at a rule or rule application level
Back		Button	Returns to the Progression Rules window

15.3.1 Assigning a Progression Calendar

Progression calendars and outcomes can be assigned to a progression rule. In the application of this progression rule, the assigned progression periods, that are dates identified through the selected calendars, and outcomes are used by default.

The rule category, used in defining a rule, can have existing calendar and outcome default. Any existing defaults assigned to the category can be viewed in the Progression Rule Categories window.

Apply Limits to a Rule

The following table defines limits on the application of a rule within a specific calendar.

Table 15–10 Applying Limits to a Rule

Limit	Function	Example
Start Period	If this rule is to start at a point in the future, a start period is nominated as part of assigning a calendar to the rule. Without this limit, the application of a rule begins when the rule is linked to an application element. Through the use of a start period, a rule can be planned and defined in advance of the period in which it is to start applying.	Current policy is that all students must maintain a program GPA of 3, but an institutional decision has been made that from the beginning of the 2001 academic year, this is to be a GPA of 3.5. This planned new rule can be defined with the appropriate start period. At that future point in time, the new, planned rule overrides the existing rule, if it has been linked to the required application element so that the start period 2001/P1 can be selected. The list of values displays the available start periods as a concatenation of the year of the calendar instance and the alternate code for the progression calendar type.
End Period	To phase out a defined rule, that is, it has a point at which it is no longer applied, nominate an end period against the assigned calendar. When a rule becomes redundant, an end period value can be entered at any time after the defining of the rule to end-date this rule, within the given calendar type. The rule can still be active under other rule applications that override this end-dating at the rule level.	Note: The list of values displays end periods in the same way as start periods, for example, 2002/P1.
Student Start Period	When the rule is applied to a student, this is a number that identifies the student's progression period, during which the application of the rule can begin.	If 2 is entered, a student who has just completed the first semester of study is not checked in relation to this rule. The student's evaluation against this rule cannot begin until the completion of the second progression period, or the second semester of study.

Table 15–10 Applying Limits to a Rule

Limit	Function	Example
Applications	This is a number that identifies the number of times the rule can be applied to a particular student.	If 2 is entered, the student can be checked in study semesters 2 and 3 only.

15.3.2 Setting Up Progression Rule Outcome IGSPR009

The progression rule outcome procedure enables users to define a progression rule outcome and map it to a progression rule application.

The progression subsystem defines outcomes for failing a progression rule and maps them to a rule at one of the following levels:

- rule category
- rule
- progression rule application

The Progression Rule Outcome window is used to define the outcome and determine the level at which the outcome is mapped to a rule application.

The following information applies when accessing outcomes mapped to a rule:

- If an outcome is defined and mapped to a rule category, access the Progression Rule Outcome window from the Progression Rule Category window.
- If an outcome is defined and mapped to a progression rule, access the Progression Rule Outcome window from the Progression Rules Applications window.

If a progression rule is assessed and failed, the details of the progression outcomes are used to create student progression outcome records. If multiple progression outcome records exist, multiple student progression outcome records are created.

Note: An outcome mapped at the progression rule application level takes precedence over any parent outcomes from the rule or rule category levels. If no outcome exists at the child application level, outcomes are inherited from the parent rule level or from the rule category level.

Existing outcomes mapped at preceding levels in the hierarchy can be viewed in the Rule Summary window. The Rule Summary window can be accessed from either the Progression Rules or Progression Rule Application windows.

Note: In the Progression Rule Outcome window, information is dynamically displayed, depending from which window the Progression Rule Outcome window is accessed.

The Progression Rule Outcome window contains the following regions:

- <context> region

The <context> region is configured dynamically, depending on from which window the Progression Rule Outcome window is accessed.

- Progression Rule Outcome region

In the Progression Rule Outcome window:

- A query cannot be performed in the <context> region.
- A rank of 1 is always used for an outcome with no alternatives.
- Progression outcome types used in the Progression Rule Outcome window are defined in the Progression Outcome Types window.
- Neither of the duration values can be specified when the progression outcome type is mapped to an Exclusion, Expulsion, or Nopenalty system type.
- Both duration values must be set where the progression outcome type is mapped to a suspension system type.
- An outcome with a system hold effect type of exclusion or suspension cannot be applied automatically.
- An error is displayed when an outcome is set to be applied automatically when program groups, credit points, attendance types, units, or unit set details are not entered completely.
- A restricted attendance type can only be entered for an outcome type with a related system hold type effect of Restricted Attendance Type.
- A restricted enrollment credit points limited to greatest or equal points and Enrollment limited to less than or equal credit points.
- A program group code can only be entered for an outcome type with a related system hold type effect of Exclusion from program group.
- Closed attendance program group codes cannot be entered.

<Context> Rule Region

The <Context> Rule region is configured dynamically based on how the Progression Rule Outcome window is accessed. Appropriate context details will be

displayed in this region for each of the different places this window can be accessed from. Data displayed in this region cannot be modified.

- If accessed from the Program Rule Category window, this region is labelled Progression Rule Category.

Navigation Buttons

The navigation buttons dynamically access the windows. The buttons are active if the context outcome type has the appropriate hold effect type. In each window, users can enter multiple codes for programs, unit sets, or units.

An outcome that affects either exclusion from a unit set or unit or required enrollment in a unit can only be set to apply automatically where at least one unit or unit set code has been recorded.

If the outcome is not set to apply automatically, the following can optionally be selected:

- programs
- unit sets
- unit codes

If a program code is not entered and the associated hold effect is program based the hold will be placed on the student program attempt the rule was tested against.

If the preceding are not entered in this window, they must be entered in the subsequent student progression outcome record before it can be applied.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Progression

Steps

1. Users can access the Progression Rules window in context from one of the following windows:
 - Rule Category window
 - Progression Rules window

- Progression Rule Application window
2. Click **Progression Outcomes**.
The Progression Rule Outcome Window appears.
 3. Enter data in each field of the window as described in the table.
 4. Save your work.

Table 15–11 Progression Rule Outcome Window Description

Field Name	Type	Features	Description
<Context> Region			
<Context>	Default, display only		<context> Note: Queries cannot be performed in the <Context> region.
Progression Rule Outcome Region			
[Data Coordination Check box]		Check box	If selected, data in Progression Rule Outcome window is automatically refreshed and coordinated with data in the Progression Rule Category window; if deselected, data in Progression Rule Outcome window is refreshed only when the user clicks in Progression Rule Outcome region. Leave deselected to speed up performance when querying records.
Failure	Required		Number of failures the context rule applies to an outcome Note: Multiple outcomes can be created for each failure number.
Repeat Failure Type	Required	List of values	Failure type; valid values are: Repeat and Conscript Note: Select Conscript if the outcome is failure for the second time or for consecutive progression periods. Note: Select Repeat if the outcome is to apply for single or subsequent rule failures in non-consecutive progression periods.

Table 15–11 Progression Rule Outcome Window Description

Field Name	Type	Features	Description
Rank	Required		<p>Rank alternative outcomes for the same rule failure</p> <p>Note: The highest ranked outcome, which is 1, is the outcome recommended or automatically applied by the system. A rank of 1 is always used for an outcome that has no alternatives. Lower ranked outcomes are selected when a student fails to make progress when reviewed.</p> <p>Note: A rank of 1 is always used for an outcome with no alternatives.</p>
Progression Outcome Type	Required	List of values	<p>Progression outcome types mapped to a system progression rule outcome type</p> <p>Note: Progression outcome types are defined in the Progression Outcome Types window.</p> <p>Note: If the progression outcome type is mapped to an exclusion, expulsion, or no penalty system type, the values for outcome duration and outcome duration type cannot be specified.</p>
Outcome Duration	Required		<p>Value determines the number of progression periods for which the outcome is active when applied to a student program attempt</p> <p>Note: The duration value is required when the progression outcome type is mapped to a suspension system type.</p>
Outcome Duration Type	Required	Drop-down list	<p>Progression outcome duration type; valid values are: Normal and Effective; normal is for all terms and effective term means the term student is enrolled for</p>
Apply Automatically	Optional	Check box	<p>If selected, indicates that an outcome is automatically added to a student program attempt as an approved outcome.</p> <p>Note: If deselected, indicates that a student program attempt is recommended with a decision status of pending that must be approved.</p> <p>Note: An outcome with a system hold effect type of Exclusion or Suspension cannot be applied automatically.</p> <p>Note: An error is displayed when an outcome is set to be applied automatically when program groups, credit points, attendance types, units, or unit set details are not complete.</p>

Table 15–11 Progression Rule Outcome Window Description

Field Name	Type	Features	Description
Restricted Attendance Type	Optional		Restricted attendance type with a related hold type Note: A restricted attendance type can only be entered for an outcome type with a related system hold type effect of restricted attendance type.
Restricted Enrollment Credit Point	Optional		Restricted enrollment credit point outcome with a related hold type Note: A restricted enrollment credit points value can only be entered for an outcome type with a related system hold type effect of restricted credit point or restricted LE credit point
Program Group Code	Optional		Program group code outcome type with a related hold type Note: Closed attendance program group codes cannot be entered.
Override Appeal	Optional	Drop-down list	If selected, indicates that the appeal is not allowed and description; valid values are: Yes and No
Override Show Cause	Optional	Drop-down list	If selected, overrides the default configuration settings applicable to a student for this rule and outcome application. It also indicates that for this outcome, show cause is not allowed.; valid values are: Yes and No
Positive Outcome	Optional	Check box	If selected, indicates that positive outcomes are linked to positive hold effects
Comments	Optional		Progression rule outcome comments
Funds	Button		Financial funding source for which awarding or disbursement will be placed on hold when outcome is applied
Excluded Programs		Button	Program from which student is excluded when outcome is applied
Awards		Button	Award given for positive outcome
Outcome Rule		Button	Opens the Progression Rule Applications Outcome window
Excluded Unit Sets		Button	Unit students from which student i excluded when outcome applied
Excluded/Required Units		Button	Units required or excluded based on pass or fail of results

15.4 Progression Rules Options

The following topics are described in this section:

- Syntax of Statistics Based Rule Options
- Syntax of Weighted Average Mark Rule Options
- Syntax of Proportional Failure Rule Options
- Syntax of Unit Failure Rule Options
- Syntax of Research Milestone Rule Options
- Syntax of Grading Options

Syntax of Statistics Based Rule Options

The progression rule leverage the flexibility of the Student Statistics and allow institutions to define rules which use institution defined student statistics. Statistic rules can be created for either Cumulative or Period timeframes, for any of the 5 current statistic elements (Earned Credit Points (CP), Attempted Credit Points, Grade Point Average (GPA), Grade Point Average Credit Points or Grade Point Average Quality Points) from any of the user defined Statistic Types and using either more than or less than logical operator.

See Chapter 13, "Records: Academic Statistics" for information about student statistics.

The following table describes syntax of statistic based rule options.

Table 15–12 Syntax of Statistic Based Rule Options

Syntax	Description
Cumulative <Statistic Type> with <Statistic Element> more than <Numeric value>	Definition: for a given user defined statistics type calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value
Cumulative <Statistic Type> with <Statistic Element> less than <Numeric value>	Definition: for a given user defined statistics type calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value
Period <Statistic Type> with <Statistic Element> more than <Numeric value>	Definition: for a given user defined statistics type calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value
Period <Statistic Type> with <Statistic Element> less than <Numeric value>	Definition: for a given user defined statistics type calculate one and compare this calculated value to the user supplied numeric value

Syntax of Weighted Average Mark Rule Options

Weighted Average Mark rules are created through nominating a Rule Category mapped to the System Rule Call Code of PRG-WAM.

The rule option selected when constructing a WAM progression rule determines the type of Weighted Average Mark calculation that is performed as the rule is evaluated. The inclusion/exclusion of student unit attempt outcomes, and the full execution of the calculation, is determined by the 'type' of WAM calculation in the rule option.

The following table describes the syntax of weighted average mark rule options:

Table 15–13 Syntax of Weighted Average Mark Rule Options

Syntax	Description
Program WAM falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt. Unit attempts not included in the calculation are those where:</p> <ul style="list-style-type: none"> the mark has a NULL value, that is, it is empty a recommended mark, not finalized, is recorded. <p>Any unit attempt with the status is DISCONTIN, is assigned a mark of 0, where the associated Administrative Unit Status is effectively enrolled for progression. If not, the unit is not included.</p> <p>Example: Program WAM falls below 60</p>
Program WAM inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt. Includes in the calculation, those unit attempts where the mark recorded is a recommended mark.</p> <p>Example: Program WAM in Recommended Outcomes falls below 60</p>
Program WAM (except where missing) falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has 'missing' marks. These would be where:</p> <ul style="list-style-type: none"> no mark is recorded, the outcome has a NULL value, that is, it is empty the mark recorded is a recommended mark, not finalized <p>The rule is failed where the calculated WAM falls below a value nominated in defining the rule.</p> <p>Example: Program WAM (except where missing) falls below 60</p>

Table 15–13 Syntax of Weighted Average Mark Rule Options

Syntax	Description
Program WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has 'missing' marks. These would be where:</p> <ul style="list-style-type: none"> no mark is recorded, the outcome has a NULL value, that is, it is empty the mark recorded is a recommended mark (not finalized) <p>Example: Program WAM (except where missing) falls below 60</p>
Program WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has 'missing' marks. These would be where:</p> <ul style="list-style-type: none"> no mark is recorded (the outcome has a 'NULL' value, i.e. it is empty) <p>A recommended mark is not considered a 'missing' mark in this calculation and is used, if a unit attempt has a recommended mark recorded.</p> <p>Example: Program WAM (except where missing) inc Recommended Outcomes falls below 60</p>
Progression period WAM falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. Unit attempts not included in the calculation are those where:</p> <ul style="list-style-type: none"> the mark has a NULL value (i.e. it is empty) a recommended mark, not finalized, is recorded <p>Any unit attempt with the status is 'DISCONTIN', is assigned a mark of 0</p> <p>Example: Period WAM falls below 60</p>
Progression Period WAM inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. Includes in the calculation, those unit attempts where the mark recorded is a recommended mark.</p> <p>Example: Period WAM inc Recommended Outcomes falls below 60</p>

Table 15–13 Syntax of Weighted Average Mark Rule Options

Syntax	Description
Progression Period WAM (except where missing) falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has missing marks.</p> <p>These would be where:</p> <p>no mark is recorded (the outcome has a 'NULL' value, i.e. it is empty)</p> <p>the mark recorded is a recommended mark (not finalized)</p> <p>Example: Period WAM (except where missing) falls below 60</p>
Progression Period WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has 'missing' marks.</p> <p>These would be where:</p> <p>no mark is recorded (the outcome has a 'NULL' value, i.e. it is empty)</p> <p>the mark recorded is a recommended mark (not finalized)</p> <p>Example: Period WAM (except where missing) falls below 60</p>
Progression Period WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has 'missing' marks.</p> <p>These would be where:</p> <p>no mark is recorded (the outcome has a 'NULL' value, i.e. it is empty)</p> <p>A recommended mark is not considered a 'missing' mark in this calculation and is used, where a unit attempt has a recommended mark recorded.</p> <p>Example: Period WAM (except where missing) inc Recommended Outcomes falls below 60</p>

Syntax of Proportional Failure Rule Options

Proportional Failure rules are created through nominating a Rule Category mapped to the System Rule Call Code of PRG-PRO or using PRG-ALL. The rule option selected when constructing a proportional failure progression rule, determines

whether the rule calculations use number of Credit Points attempted and achieved or number of units attempted and achieved in this Student Program Attempt. Which student unit attempts (in this Student Program Attempt) are included is also determined by the rule option selected. It may be only those attempted in the current progression period, all attempted in this student Program attempt or those attempted in a specified number of previous progression periods. Certain rule options allow the inclusion of recommended grades in the rule calculation.

The following table describes the syntax of proportional failure rule options:

Table 15–14 Syntax of Proportional Failure Rule Options

Syntax	Description
Fail more than < Numeric value>% CP attempted	<p>Definition: for the whole student Program attempt, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (at the date of the rule evaluation). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted</p>
Fail more than < Numeric value>% Units attempted [inc Recommended Outcomes]	<p>Definition: for the whole student Program attempt, the number of units failed is calculated as a percentage of the number that have been attempted (at the date of the rule evaluation). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted or with qualification: Fail more than 40 % Units inc Recommended Outcomes</p>
Fail more than < Numeric value>% CP attempted in current progression period	<p>Definition: for the current progression period only, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (in this progression period). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted in current progression period</p>

Table 15–14 Syntax of Proportional Failure Rule Options

Syntax	Description
Fail more than < Numeric value>% Units attempted in current progression period [inc Recommended Outcomes]	<p>Definition: for the current progression period, the number of units failed is calculated as a percentage of the number that has been attempted (in this progression period). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted in current progression period or with qualification: Fail more than 40 % Units in current progression period inc Recommended Outcomes</p>
Fail more than < Numeric value>% CP attempted in previous <Numeric value> progression periods	<p>Definition: for the nominated number of previous progression periods, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (over those progression periods). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted in previous 2 progression periods</p>
Fail more than < Numeric value>% Units attempted in previous <Numeric value> progression periods [inc Recommended Outcomes]	<p>Definition: for the nominated number of previous progression periods, the number of units failed is calculated as a percentage of the number which have been attempted (over those progression periods). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted in previous 2 progression periods or with qualification: Fail more than 40 % Units in previous 2 progression periods inc Recommended Outcomes</p>

Syntax of Unit Failure Rule Options

Unit Failure rules are created through nominating a Rule Category mapped to the System Rule Call Code of PRG-UFAIL or PRG-ALL.

The rule option selected when constructing a unit failure progression rule determines which student unit attempt results are evaluated (all attempted in this student Program attempt or only those matching/other than a list of designated units).

The following table describes the syntax of unit failure rule options:

Table 15–15 Syntax of Unit Failure Rule Options

Syntax	Description
Fail any unit <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a Student Program Attempt record contains failed unit attempts, these unit failures are evaluated to check if any single unit has been failed the nominated number of times. Where true, the student fails this progression rule. This can be qualified to include recommended unit results in the calculation.</p> <p>Example: Fail any unit 2 times or with qualification Fail any unit 3 times in Recommended Outcomes</p>
Fail any (I/W) unit <Numeric value> times	<p>Definition: where a Student has failed unit attempts (in this Program or others), these unit failures are evaluated to check if any single unit has been failed the nominated number of times. Where true, the student fails this progression rule.</p> <p>Example: Fail any unit 2 times</p>
Fail designated units {Unit Code}[inc Recommended Outcomes]	<p>Definition: where a Student Program Attempt contains failed unit attempts in any of the units listed inside the braces {}, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific versions by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail designated unit(s) {EXP201, EXP202, EXP301, EXP302, EXP401, EXP402} or with qualification Fail designated unit(s) {EXP201, EXP202} inc Recommended Outcomes</p>
Fail designated (I/W) units {Unit Code}	<p>Definition: where a Student Program Attempt contains failed unit attempts in any of the units listed inside the braces {}, whether in this Program or not, the progression rule is failed. The unit codes can be limited to specific versions by using a separator between the unit code and version number, FOR EXAMPLE, SRP161.2</p> <p>Example: Fail designated (I/W) unit(s) {EXP201, EXP202, EXP301, EXP302, EXP401, EXP402}</p>

Table 15–15 Syntax of Unit Failure Rule Options

Syntax	Description
Fail designated (I/W) units {Unit Codes} at least <Numeric value> times	<p>Definition: where a Student has failed unit attempts (in this or other Programs), these unit failures are evaluated to check if any match the unit codes listed. If true, has there been the nominated number of failures recorded for that unit code (or more). Where true, the student fails this progression rule.</p> <p>Example: Fail one of {EXP201, EXP202} more than 2 times</p>
Fail designated units not in {Unit Code} [inc Recommended Outcomes]	<p>Definition: where a Student Program Attempt contains any failed unit attempts other than those listed inside the braces{}, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific version by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail designated units not in {SEM317, SEM334, SEM225} or with qualification Fail designated unit(s) { SEM317, SEM334} inc Recommended Outcomes</p>
Fail one of {Unit Codes} at least <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a Student Program Attempt contains failed unit attempts, these unit failures are evaluated to check if any match the unit codes listed. If true, has there been the nominated number of failures recorded for that unit code (or more), in this Student Program Attempt. Where true, the student fails this progression rule. This can be qualified to include recommended unit results in the calculation.</p> <p>Example: Fail one of {EXP201, EXP202} more than 2 times or with qualification Fail one of {EXP201, EXP202} more than 2 times inc Recommended Outcomes</p>
Fail units not in {Unit Code} at least <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a Student Program Attempt contains any failed unit attempts other than those listed inside the braces{}, the number of times a unit has been failed is evaluated. Where the number of failures is equal to or greater than the numeric value entered, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific version by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail units not in {AAM261} more than 2 times or with qualification Fail units not in {AAM261} more than 2 times inc Recommended Outcomes</p>

Syntax of Research Milestone Rule Options

Research Milestone rules are created through nominating a Rule Category mapped to the System Rule Call Code of PRG-MLS or PRG-ALL.

The rule option selected when constructing a research milestone progression rule determines the Milestone Status evaluated (either a status of FAILED or any status other than ACHIEVED). Rule options can also limit the evaluation to specified milestones and/ or a nominated number of times that a milestone type can have a status of FAILED recorded.

The following table describes the syntax of research milestone rule options.

Table 15–16 Syntax of Research Milestone Rule Options

Syntax	Description
Fail any milestone	Definition: Where a research candidate has any milestone type with a milestone status of FAILED, he/she fails this progression rule. Example: Fail any milestone
Fail any milestone more than <Numeric Value> times	Definition: This rule is failed where a research candidate has the nominated number of instances of a milestone type with the milestone status of FAILED. Example: Fail any milestone more than 1 times A candidate may have the following set of Milestone Types and statuses: 6MONTH/Failed, 12MONTH/Achieved, 6MONTH/Failed, 12MONTH/Planned, PRE-SUB/Planned. This candidate would fail this progression rule. A second candidate with the set: 6MONTH/Failed, 12MONTH/Achieved, 6MONTH/Planned, 12MONTH/Planned, PRE-SUB/Planned; would not fail the rule.
Fail one of {Milestone Type} [more than <Numeric Value> times]	Definition: Where a research candidate has one of the nominated milestone types (listed in braces {}) with a milestone status of FAILED the progression rule is failed. This can be further qualified to consider the number of instances that one of the listed milestone types has a FAILED status. Example: Fail one of { 6MONTH, 12MONTH , PRE-SUB} Fail one of { 6MONTH, 12MONTH , PRE-SUB} more than 2 times

Table 15–16 Syntax of Research Milestone Rule Options

Syntax	Description
Fail to achieve {Milestone Type}	<p>Definition: This rule is failed when a research candidate has a milestone (one of the types listed inside braces {}), matching both conditions. The milestone's Due Date is later than the start date of the current progression period and earlier than the current date The milestone has a status of PLANNED.</p> <p>Example: Fail to achieve { 6MONTH , 12MONTH }</p>
Fail to achieve any milestone	<p>Definition: This rule is failed where a research candidate has any milestone matching both conditions. The milestone's Due Date is later than the start date of the current progression period and earlier than the current date The milestone has a status of PLANNED.</p> <p>Example: Fail to achieve any milestone</p>

Syntax of Grading Options

Grading rules are created through nominating a Rule Category mapped to the System Rule Call Code of PRG-ALL.

The rule option selected when constructing a Grading progression rule determines which grades are used to evaluate progress. Typically the grading rules are used in conjunction with other rule measures. Grades are designated using the grading schema/grade format.

The following table describes the syntax of grading options.

Table 15–17 Syntax of Grading Options

Syntax	Description
More than <numeric value> % attempted Credit Points of <grades>	<p>Definition: The percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted CP of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>

Table 15–17 Syntax of Grading Options

Syntax	Description
More than <numeric value> % attempted Credit Point of <grades> in current period	<p>Definition: For the current progression period, the percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted CP of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
More than <numeric value> % attempted units of <grades>	<p>Definition: The percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value> % attempted units of <grades> in current period	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
More than <numeric value> attempted Credit Points of <grades>	<p>Definition: The number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value> attempted Credit Points of <grades> in current period	<p>Definition: In the current progression period, the number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>

Table 15–17 Syntax of Grading Options

Syntax	Description
More than <numeric value> attempted units of <grades>	<p>Definition: The number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value> attempted units of <grades> in current period	<p>Definition: For the current progression period, the number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
Less than <numeric value> % attempted Credit Points of <grades>	<p>Definition: The percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted CP of grades {STANDARD/A, STANDARD/B, STANDARD/C}</p>
Less than <numeric value> % attempted Credit Point of <grades> in current period	<p>Definition: For the current progression period, the percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 35% attempted CP of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value> % attempted units of <grades>	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>

Table 15–17 Syntax of Grading Options

Syntax	Description
Less than <numeric value> % attempted units of <grades> in current period	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value> attempted Credit Points of <grades>	<p>Definition: The number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 8 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C}</p>
Less than <numeric value> attempted Credit Points of <grades> in current period	<p>Definition: In the current progression period, the number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value> attempted units of <grades>	<p>Definition: The number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C}</p>
Less than <numeric value> attempted units of <grades> in current period	<p>Definition: For the current progression period, the number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B} in current period</p>

15.4.1 Calculations

Progression Definitions

The following table describes terms used to measure progress as a student's progress is tracked.

Table 15–18 Progression Term Definitions

Term	Definition
achievable credit points	number of unit's credit points that count toward student's enrollment; if an override credit point value is set for a student unit attempt, override value is used; total value of achievable credit points used for GPA and WAM
grade point average (GPA)	calculated value used to measure a student's progress by averaging the grades a student receives, taking into account the total study load
grade GPA value	value specified for each grade when defining an institution's grading schema
weighted average mark (WAM)	calculated value used to measure a student's progress in a program attempt
numeric mark value	value recorded as the assessment outcome for each unit a student studies
WAM weighting value	<p>derived from one of the following values:</p> <p>value assigned to a unit when a unit level is entered; can be weighted differently by unit level, for example, an undergraduate degree program can have a lower weighting value than a unit designed to be studied in final year of same program</p> <p>value assigned to a unit internal program level; a program level value can be assigned to a unit that weights the unit based on program level at which unit is designed to be studied; for example, a standard first year undergraduate unit can have a unit internal course level of 1, but if that unit is taken by a student enrolled in a Master's degree program, the low unit internal program level results in a lower WAM value for that student</p> <p>Priority for WAM weighting value is as follows:</p> <ul style="list-style-type: none"> - first: unit internal program level value - second: unit level value - third: value of 1

Table 15–18 Progression Term Definitions

Term	Definition
show cause	If a student makes a submission related to a progression outcome before the outcome is applied, following details about submission can be viewed and recorded: <ul style="list-style-type: none"> - expiration date - date of show cause - date of show cause outcome - show cause outcome type
date of show cause	date when show cause submitted by student
date of show cause outcome	date on which decision about show cause outcome is made
show cause outcome type	result of show cause hearing; either upheld or dismissed
appeal	request to vacate decision after outcome is applied. If a student lodges an appeal against a progression outcome, the following details about the appeal are recorded: <ul style="list-style-type: none"> - expiration date - date of appeal - date of appeal outcome
date of appeal	date when appeal lodged by student
date of appeal outcome	date when decision about outcome is made
appeal outcome type	result of appeal hearing; either upheld or dismissed
progression rule outcome type	institution-defined code that defines an outcome that can be linked to a progression rule
encumbrance end date	expiration date for encumbrances that are due to expire within the related progression period. A data alias must be nominated to represent the encumbrance end date in the system-wide progression configuration. If no encumbrance end date alias exists, the calendar end date is used.

Weighted Average Mark Calculation

The standard formula for calculating a student's WAM is as follows:

$$\text{WAM} = \text{total WAM achieved} / \text{total achievable WAM}$$

The total WAM achieved is calculated from the results saved against each unit in a student's program attempt. The standard formula for calculating a student's total WAM achieved is as follows:

total WAM achieved = achievable credit points * WAM weighting * numeric mark
The total achievable WAM is calculated from the basic unit details saved against each unit. The standard formula for calculating total achievable WAM for each unit is as follows:

total achievable WAM = achievable credit points * WAM weighting

15.4.1.0.1 Unit Level WAM The following is an example of calculating unit level WAM weighting.

Three units have the unit level WAM weighting values described in the following table.

Table 15–19 Unit Level WAM Weighting Values

Unit	Achievable Credit Points Value	Unit Level WAM Weight Value
ABG271	2	2.00
ASC238	1	2.00
HD0101	4	9.00

Using the values in the previous table, the unit level WAM for that student is calculated as described in the following table.

Table 15–20 Unit Level WAM Calculation Example

Unit	Achievable WAM: Achievable CP * WAM Weighting	Student's Mark	WAM Achieved: Achievable CP * WAM Weight * Mark
ABG271	4	71	284
ASC238	2	85	170
HD0101	36	80	2880
Total	42	N/A	3.334

Using the values in the previous table, the calculation for the unit level WAM is as follows:

= 3,334/42
unit level WAM = 79.381

15.4.1.0.2 Unit Internal Program Level WAM The following is an example of calculating unit internal program level WAM weighting.

Three units have the unit internal program level WAM weighting values described in the following table

Table 15–21 Unit Internal Program Level WAM Weighting Values

Unit	Achievable Credit Points Value	Unit Internal Program Level WAM Weight Value
ABX712	2	2
ACC382	1	1
HD0411	4	4

Using the values in the previous table, the unit internal program level WAM for that student is calculated as described in the following table.

Table 15–22 Unit Internal Program Level WAM Calculation Example

Unit	Achievable WAM: Achievable CP * WAM Weighting	Student's Mark	WAM Achieved: Achievable CP * WAM Weight * Mark
ABX712	4	71	284
ACC382	1	85	85
HD0411	16	80	1,280
Total	21	N/A	1,649

Using the values in the previous table, the calculation for the unit internal program level WAM is as follows:

$$= 1,649 / 21$$
$$\text{unit internal program level WAM} = 78.524$$

The following guidelines apply when calculating the WAM:

- The inclusion or exclusion of student unit attempt outcomes and the full execution of the calculation is determined by the type of WAM calculation.
- The inclusion or exclusion of discontinued student unit attempts is determined by the associated administrative unit status. A discontinued unit is only included in the calculation if the Effectively Enrolled for Progression Indicator is set for that unit.
- WAM values are stored if the configuration parameter Calculate Weighted Average Mark indicator is set at the configuration level applicable to one of the following student program attempts:

- system
- organizational unit
- program version configuration
- WAM values are saved with data that identifies the progression period in which it was calculated. Only program WAM and progression period WAM values can be saved. Therefore, the resulting value from calculations that include recommended marks cannot be saved.

15.4.2 Calculating Show Cause or Appeal Expiration Dates

If progression rules are applied in a configuration that allows a student to show cause or appeal, the date by which that student must show cause or lodge an appeal is calculated. The calculation uses the following values:

- show cause or appeal length value from the configuration level that applies to this student
- show cause or appeal cutoff date alias instance from the applicable progression calendar
- date when progression outcome was approved

The standard formula for calculating the expiration date for show cause or appeal expiration dates is as follows:

expiration date = outcome approval date + show cause or appeal length value
If the expiration date is later than the show cause or appeal cut off date alias instance, the expiration date is set to the cut off date alias instance, which is a future date. This case is shown for Student B in the following table.

If the cut off date alias instance is passed, the expiration date for this student is set to the current date. This case is described for Student C in the following table.

Table 15–23 Calculating Show Cause or Appeal Expiration Dates Example

Student	Applicable Show Cause Cut Off Date Alias Value	Applicable Show Cause Length	Outcome Approval Date	Expiration Date by Which Time Student Must Show Cause
Student A	31-JUL-99	14	25-JUN-99	09-JUL-99
Student B	31-JUL-99	14	20-JUL-99	31-JUL-99
Student C	31-JUL-99	14	03-AUG-99	03-AUG-99

15.4.2.1 Calculating Expiration Dates

Progression outcome and encumbrance expiration dates can only be derived if the duration and duration type are defined as part of the student progression outcome. Only outcomes with the following system progression rule outcome types can have a duration or duration type:

- SUSPENSION
- PROBATION
- MANUAL

Therefore, only the preceding outcomes can have derived expiration dates for outcome and the associated encumbrance.

The progression outcome and encumbrance expiration dates calculation requires the existence of instances of future progression calendars of the same stream number as the progression calendar in which the outcome was applied. At least the same number of instances must exist as the number entered for the duration of the progression outcome. The instance for the identified progression calendar of the Encumb End Date Alias, which is set in the system-wide configuration, is saved as the expiration date. If no instance of this date alias exists in the existing progression calendar, the end date of that progression calendar is used.

The standard formula for calculating the progression outcome and encumbrance expiration dates is as follows:

- if duration type is NORMAL, expiration date is Encumb End Date Alias for the n^{th} future progression calendar instance where n equals duration
- if duration type is EFFECTIVE, expiration date is Encumb End Date Alias instance for the n^{th} future progression calendar instance in which student had a student unit attempt with status ENROLLED, COMPLETED, or DISCONTINUED saved in a subordinate teaching period
- if required calendars do not exist, expiration dates are not recorded and the batch maintenance process derives the dates as soon as possible after the calendar instance is created

Some progression outcomes and their associated encumbrances cannot have a duration or a duration type specified, and therefore cannot have a derived expiration date. These are outcomes of the following system progression rule outcome types:

- EXCLUSION
- EXPULSION

■ NOPENALTY

The preceding system progression rule outcome types must be manually ended in one of the following ways:

- A decision status CANCELLED can be entered for the outcome. When this change to decision status is applied, the system date is entered as the expiration date for the student progression outcome and associated encumbrance and encumbrance effects.
- An outcome can have the expiration date manually set to enable ending an outcome without changing the decision status. This can be done to end one of the outcome types that cannot have duration details recorded. It can also be used to expire a current outcome to allow the application of another incompatible outcome. For example, a student who currently has an applied PROBATION outcome cannot have an EXCLUSION outcome added until the existing probation expires.

Note: Any outcome can be manually set to expire by overriding a derived expiration date if the user has the required authority.

The following table describes an example where a NORMAL duration type and duration length of 2 is applied to Student1 on 25-JUN-99. The progression periods are semester length with a stream number of 1, so the student is suspended for Semester 2 1999 and Semester 1 2000. The outcome expiration date equals the Encumb End Date Alias instance for the Semester 1 2000 progression calendar.

Table 15–24 Progression Outcome and Encumbrance Expiration Dates, Example 1

Outcome Duration Type	Duration	Stream Number of Progression Calendar Instance	Required Conditions to Derive Expiration Date	Applied On	Outcome or Encumbrance Expiration Date
NORMAL	2	1	2 active future progression calendars with stream number=1 for example, Semester 2 1999 and Semester 1 2000	25-JUN-99	Encumb End Date Alias instance from 2nd identified calendar = 01-JUN-00

The following table describes an example where a NORMAL duration type and duration length of 2 is applied to Student2 on 25-NOV-99. The progression periods are a year long with a stream number of 2, so the student is suspended for academic

years 2000 and 2001. The outcome expiration date equals the Encumb End Date Alias instance for the year 2001 progression calendar.

Table 15–25 Progression Outcome and Encumbrance Expiration Dates, Example 2

Outcome Duration Type	Duration	Stream Number of Progression Calendar Instance	Required Conditions to Derive Expiration Date	Applied On	Outcome or Encumbrance Expiration Date
NORMAL	2	2	2 active future progression calendars with stream number=2 for example, Year 2000 and Year 2001	25-NOV-99	Encumb End Date Alias instance from 2nd identified calendar = 01-DEC-01

The following table describes an example where Student3 has a probation outcome applied with an associated encumbrance type restricting this student to part-time enrollment. This outcome has the duration value of two EFFECTIVE periods. The expiration dates cannot be derived until the student is effectively enrolled for two progression periods. When the second period in which the student is effectively

enrolled is identified by running a batch maintenance job, the expiration dates are derived.

Table 15–26 Progression Outcome and Encumbrance Expiration Dates, Example 3

Outcome Duration Type	Duration	Stream Number of Progression Calendar Instance	Required Conditions to Derive Expiration Date	Applied On	Outcome or Encumbrance Expiration Date
EFFECTIVE	2	1	<p>active future progression calendars with stream number=1</p> <p>for example, Semester 2 1999, Semester 1 2000 and Semester 2 2001</p> <p>student must have at least one student unit attempt with status ENROLLED, COMPLETED, or DISCONTIN recorded in a teaching period subordinate to each progression calendar</p>	25-JUN-99	<p>completed student unit attempt in Semester 2 1999 teaching period</p> <p>no student unit attempt in Semester 1 2000 teaching period</p> <p>enrolled student unit attempt in Semester 2 2000 teaching period</p> <p>Encumb End Date Alias Instance from second identified calendar = 01-DEC-2000</p>

Note: If the unit status is DISCONTIN, the associated administrative unit status must be one that considers this unit effectively enrolled for progression.

Records: Graduation

16.1 Graduation Configuration

The Graduation windows manage the records and processes required to identify and manage students expected to graduate during particular ceremony rounds, including conferral of awards and attendance at graduation ceremonies.

The following types of windows exist in the Graduation windows:

- windows that create a structure for ceremonies
- windows that manage graduands

Windows associated with other subsystems provide information used in the Graduation windows. For example, award information is maintained in the Program Structure and Planning subsystem. Assessment windows and Organizational Structure windows record ceremony venues and link graduation locations to campuses where graduands study. Progression windows affect decisions about which students can graduate.

A ceremony round describes a period of time when a set of graduation ceremonies is conducted. A ceremony round is based on a calendar instance and includes the preparatory processes leading up to a ceremony, as well as the cleanup processes after ceremonies are held.

Institutions typically have two or three ceremony rounds during an academic year. Ceremony rounds can run concurrently, for example, when an institution conducts graduation ceremonies both at home and in another country. This situation can also be handled by differentiating between locations within a single ceremony round.

Subsystem specialists must set up the following data before graduation processing can occur:

- graduation calendars and date aliases

- reference data, including award and honors level information
- each ceremony to be held in a ceremony round, together with venue, date, time, and other relevant details

Note: Ceremonies are identified by number.

- for each ceremony, a list of the awards to be presented

Note: Honorary awards must be listed for ceremonies.

Note: Unit sets, such as majors, within awards can be specified.

- all venues at which ceremonies are held. Venues are grouped under graduation locations that link to the campuses where students study, including campuses in different suburbs, cities, regions, or countries. For example, campuses A, B, and C of an institution can link to a city graduation location and campuses D and E can link to a regional graduation location. One or more ceremony venues are associated with each graduation location, although each location typically has a single venue.

Note: A student program attempt must have a location which is related to the location of the graduation ceremony venue for the student to be automatically matched to the ceremony by the Allocate Graduands job.

Graduation Reference Data

The following table describes reference data that must be created and maintained in order for the Graduation subsystem to function.

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
Graduand Statuses	indicate the graduand's academic eligibility to graduate and the current state of the graduand record	mandatory	Graduand Statuses	none

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
Graduand Approval Statuses	used to determine whether the graduand is formally approved to graduate	mandatory	Graduand Approval Statuses	none
Honors Levels	are institution-defined equivalents to government honors levels. Other non-government levels of achievement are also entered.	mandatory if institution records honors as part of graduation process	Honors Levels	government honors levels must be entered in the Government Honors Levels window
Graduation Note Types	used to classify notes about ceremonies according to purpose	mandatory if notes are used in the Graduation Ceremony window	Graduation Note Types	none
Testamur Types	indicate content and layout requirements of testamurs	optional	Credential Types	correspondence types
Measurements - Gown Hat	full list of gown and hat sizes available to graduands	mandatory if sizes are entered in the Graduand Ceremony Details window	Measurements	none

Reference Data	Purpose	Type	Window	Prerequisite Setup Dependencies
Awards	used to represent awards conferred by the institution, typically after completing the requirements of a program, and honorary awards, prizes, and medals	mandatory	Awards	none
Program Awards	used to enter the links between awards and programs and required for conferring awards and organizing graduation ceremonies. This data is typically set up when establishing program structure details.	mandatory	Program Awards	Awards window

Graduand Records

Once identified as a possible graduand, a graduand record is created for each ceremony round for which the student is eligible. The graduand record is the basis for any subsequent processing within the round. A second record, the graduand award ceremony record, is created when a graduand is assigned to a ceremony. This record must exist before an order-in-presentation number can be allocated to a graduand who wants to attend a ceremony. Both records are typically created for groups of students by running processes, but can be created through a window for individual students and graduands. For honorary awards, graduand records must always be created manually through a window.

Graduand Status, Graduand Approval Status, and Graduand Type

The combination of the graduand status, approval status, and graduand type determines how far a graduand can progress through the graduation cycle. Graduand status determines a graduand's academic standing. Approval status signifies whether formal approval to graduate has been granted by a council or by the relevant academic organizational unit, at the discretion of an individual institution. Graduand type indicates a graduand's intentions about receiving an award.

A graduand cannot be entered as graduated unless the graduand has a system graduand status of Eligible, an approval status of Approved, and a graduand type of Attending or Inabsentia.

The following table describes graduand status system values.

System Values	Description
Potential	Identified as possible graduand, but program not yet set as completed
Eligible	Completion of relevant program is confirmed and Program Attempt Requirements Complete? indicator set to Yes
Graduated	Award has been conferred
Surrender	Conferred award has been surrendered, typically in favor of a higher award

The following table describes approval status system values.

System Values	Description
Waiting	Pending decision
Approved	Approval granted
Rejected	Not approved

The following table describes graduand type system values.

System Values	Description
Unknown	Not yet notified by graduand
Attending	Attending ceremony
Inabsentia	Does not want to attend ceremony but is receiving award
Articulate	Declines award in favor of pursuing studies for higher award
Deferred	Wants to receive award in later, unspecified ceremony round
Declined	Declines to accept the award for other reasons

16.1.1 Setting Up Graduand Status IGSGR001

Graduand status determines a graduand's academic standing. Approval status signifies whether formal approval to graduate has been granted by a council or by the relevant academic organizational unit, at the discretion of an individual institution. Graduand type indicates a graduand's intentions about receiving an award.

Graduand statuses indicate the current state of a graduand record and whether graduands can graduate in a ceremony in a particular ceremony round.

The graduand statuses procedure creates institution-defined graduand statuses that are matched to system-defined graduand statuses.

In the Graduation windows, graduand statuses are viewed in the Graduand Ceremony Details and Ceremony Graduands windows, and modified in the Graduand Details window. In many circumstances, graduand statuses are set by the Identify and Create Graduands and Assign Graduand Status concurrent processes.

To create a graduand status, perform the following steps

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Graduand Status > Graduand Statuses window

Steps

1. Create institution-defined graduand status.
2. Map institution-defined graduand status to a system-defined graduand status.
One or more institution-defined statuses can be assigned to each system-defined status.
3. Save your work.

Guidelines

- System-defined graduand statuses include Potential, Eligible, Graduated, and Surrender.
- To prevent further use of a record, the Closed Check box must be selected.
- Once assigned to a graduand record, a graduand status cannot be deleted.

16.1.2 Setting Up Graduand Approval Statuses IGSGR002

The graduand approval status, graduand status, and graduand type indicate a potential graduand's progress toward graduation in a particular round. Approval indicates that graduands can graduate and final ceremony preparations can occur.

The graduand approval status procedure creates institution-defined graduand approval statuses that are matched to system-defined graduand approval statuses.

Institutions determine their approval process based on their graduation process, and can require approval by formal council or by an academic organizational unit.

The Ceremony Graduands window approves specific student groups for graduation.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Graduand Approval Status > Graduand Approval Statuses window

Steps

1. Create institution-defined graduand approval status.
2. Map institution-defined graduand approval status to a system-defined graduand approval status.

One or more institution-defined statuses can be mapped to each system-defined status.
3. Save your work.

Guidelines

- System-defined graduand approval statuses include Waiting, Approved, and Rejected.
- Approval can be granted if the graduand status is Potential, or approved subject to confirming program requirements are complete.
- A graduand's graduand status must be Eligible and graduand approval status must be Approved in order to graduate.
- To prevent further use of a record, the Closed Check box must be selected.
- Once assigned to a graduand record, a graduand approval status cannot be deleted.

16.1.3 Setting Up Government Honors Levels IGSST013

Institution-defined honors level codes must be mapped to government honors level codes, which specify the graduands.

Use this procedure to enter institution-defined honors level codes and codes for other similar levels of achievement.

Similar levels of achievement include degrees awarded with merit or with distinction, which may be used if a program does not have an honors level.

In the United Kingdom, the government honors levels are the HESA classification codes applicable to HESA student and combination return field 39 CLASS. The institution-defined classification codes are set up as honors levels.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Government Reference > Honors Level window

Steps

Enter data in each field of the window as described in the table. Save your work.

To create a government honors level code, perform the following steps.

1. In Oracle Student System, navigate to Government Honors Levels window as follows:

Setups > Government Reference > Honors Level

2. In the Government Honors Level Code field, enter the honors level code.
3. In the Description field, enter the Description of the code.
4. Click **Honors Level**.

The Honors Levels window appears.

5. Enter the honors level, description, and rank.
6. Save or save and continue as follows:
File > Save or Save and Proceed
7. Close the window.

Guidelines

Once mapped to an institution-defined honors level code, a government honors level code cannot be deleted.

Selecting Closed prevents further use, except when a government honors level code is mapped to an open institution-defined honors level code.

16.1.4 Setting Up Honors Levels IGSGR005

Similar levels of achievement include degrees awarded with merit or with distinction, used if a program does not have an honors level.

The honors levels procedure enters institution-defined honors level codes and codes for other similar levels of achievement.

In the Graduation windows, honors level codes are recorded against graduate records in the Graduand Details window.

In the Admissions subsystem, these codes are recorded against an applicant's prior academic history record in the Academic History Details window.

This window can be accessed directly from a menu or through the navigation button in the Government Honors Levels window. In the latter case, only those records which map to the government honors level selected in the Government Honors Levels window are displayed in this window. A query must be performed in this window to view other records.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Honors Level > Honors Levels window

Steps

1. Assign a rank to each honors level entered in this window.

This ranking is Required because the Set Graduand Order in Presentation process allocates sequence numbers to graduates for determining the order in which the graduates are presented with their awards at the graduation ceremony.

This process provides an option to group honors graduates separately. When selecting this option, the process sequences honors graduates within the group according to the ranks assigned in this window.

2. Map institution-defined honors level codes to government honors level codes other than zero, and enter their descriptions.
3. Map other institution-defined achievement level codes to the government honors level code zero, and enter their descriptions.
4. Save your work.

Guidelines

- More than one honors level can be mapped to the same government honors level.
- Once used in the system, the honors level record of a graduate cannot be deleted. Select the Closed Check box to prevent further use.

16.1.5 Setting Up Credential Types IGSGR004

A credential is a diploma or any official printed document indicating a student receives an award.

A credential type classifies a credential. For example, an institution can have a standard credential for a program award and another non-standard credential for joint awards. Awards are associated with credential types in the Awards window. Each credential type must also be mapped to a correspondence type because credentials are frequently mailed.

Prerequisites

Correspondence Types IGSCO001

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Credential Type > Credential Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 16–1 *Credential Types Details Window Description*

Field Name	Type	Features	Description
Credential Type	Required		Credential type Note: Once assigned to an award, a credential type cannot be deleted.

Table 16–1 Credential Types Details Window Description

Field Name	Type	Features	Description
Description	Required		Credential type description
Correspondence Text	Required	List of values	credential type correspondence text Note: One or more credential types can be mapped to each correspondence type.
Closed	Optional	Check box	If selected, prevents further use of a record

16.1.6 Setting Up Measurements IGSGR006

In the Measurements window, the full range of hat, or mortarboard, and gown sizes available for graduands is entered. All details entered in this window appear in a List of values in the Graduand Ceremony Details window, where hat and gown sizes for a graduand are entered.

The measurements procedure enters measurement codes that designate the size of graduation gowns and hats for each graduand.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Measurements > Measurements window

Steps

1. In the Measurement Code field, enter a measurement code, for example, 51 CM or 42 IN.
2. In the Description field, enter a description of the measurement code, for example, 51 Centimeters or 42 Inches.
3. In the Measurement Type field, enter the category to which a measurement belongs, for example, Mortarboard or Gown.
4. Save your work.

16.1.7 Setting Up Graduation Note Types IGSGR003

The graduation note types procedure enters note types that classify notes about graduation ceremonies.

In the Graduation Ceremony window, notes in a variety of formats can be added about graduation ceremonies. Note types set up in the Graduation Note Types window group notes according to criteria relevant to the institution, such as purpose of notes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Setups > Graduation Note Type > Graduation Note Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 16–2 *Graduation Note Types Window Description*

Field Name	Type	Features	Description
Graduation Notes Type	Required		Graduation notes type Note: Notes created in the Graduation Ceremony window must be assigned a note type created in the Graduation Note Types window.
Description	Required		Graduation notes type description

16.1.8 Setting Up Venues

Venues are created in System Wide - Organizational Structure module.

Venues IGSA017

Venue Addresses IGSA018

Venue Availability IGSA019

See Setting Up Venues IGSA017 in Chapter 6, "Systemwide Services: Organizational Structure" for information about setting up venues.

16.2 Graduation Ceremonies

16.2.1 Setting Up Graduation Ceremony IGSGR007

The term ceremony round represents a period of time during which a set of graduation ceremonies are conducted. The term can also imply the preparatory events and processes leading up to the ceremony period itself. Each ceremony round is linked to one or more completion periods called ceremony round periods, that identify potential graduands. Oracle Student System automatically identifies and creates graduand records in the Identify and Create Graduands concurrent process and compares the nominated completion periods defined in Enrollments to ceremony round periods.

Institutions typically have more than one ceremony round during an academic year. Ceremony rounds can run concurrently, for example, if an institution also runs graduation ceremonies abroad. Institutions can also create different ceremony locations within the same ceremony round.

Ceremony rounds and their associated ceremonies are defined in the Graduation Ceremony window, one of three windows used to enter ceremony data. The Award Ceremony window, accessed from the Graduation Ceremony window, and the Unit Set Ceremony window, accessed from the Award Ceremony window, are also used to enter ceremony data.

The ceremony data is used primarily by the Manage Allocation of Graduands to Ceremonies concurrent process to allocate graduands with program awards to ceremonies, and the Set Graduand Order in Presentation concurrent process to set up presentation orders within each ceremony. Graduates can be allocated to ceremonies individually using the Graduand Ceremony Details window.

A graduation calendar instance broadly defines a ceremony round. Only those date alias instances already associated with the selected ceremony round are available for use in this window.

Note: Information related to a ceremony cannot be updated after the ceremony date is passed.

Combinations of graduate status, graduate approval status, and graduate type are used to determine the following types of totals:

- Total, for graduands with graduation statuses of Potential or Eligible to graduate, Approved or Waiting approval, and indicating they are Attending or their intention to attend is Unknown
- Total attending, all those Eligible, Approved or Waiting who are Attending

- Total minus total attending

Prerequisites

Venues IGSAS017

Calendar Types IGSCA002

Date Aliases IGSCA006

Program Details IGSOS013

Program must be active.

Awards IGSPS008

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Graduation Ceremony > Graduation Ceremony window

Steps

Enter data in each field of the Graduation Ceremony window as described in the table. Save your work.

Table 16–3 Graduation Ceremony Window Description

Field Name	Type	Features	Description
Calendar Type	Required	List of values	Graduation calendar type
Effective Dates	Display only		Effective calendar dates
Start Date Alias	Required	List of values	Graduation start date alias
End Date Alias	Required	List of values	Graduation end date alias
Graduands		Button	Opens the Ceremony Graduands window
Ceremony Round Period Region			

Table 16–3 Graduation Ceremony Window Description

Field Name	Type	Features	Description
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Ceremony Round region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Year field in the Ceremony Round region. Select to speed up performance when querying records.
Year	Required		Ceremony round year
Completion Period	Required	List of values	Ceremony round completion period
Graduation Ceremony Region			
Ceremony Number	Required		Unique ceremony number Note: Once a ceremony is created, the ceremony number cannot be amended.
Venue Code	Required	List of values	graduation ceremony venue code Note: Venue codes are entered in the Venues window.
Ceremony Date Alias	Required	List of values	Ceremony date alias mapped to ceremony round, description, and alias value Note: The ceremony start date alias instance cannot be changed once graduands are allocated to the ceremony.
Closing Date Alias	Required	Calendar	Closing date alias instance indicating the cutoff point for the automatic allocation of graduands to the ceremony; individual allocation of graduands to ceremonies can occur after the closing date using the Graduand Ceremony Details window
Ceremony Start Time	Required	Calendar	Ceremony start time
Ceremony End Time	Required	Calendar	Ceremony end time
Ceremony Fee	Optional		Ceremony fee amount
Maximum Guests Per Graduand	Optional		Maximum number of guests allowed per graduand
Total Attending	Display only		Total indicates graduands with statues of Potential or Eligible to graduate, Approved or Waiting for approval and attending or Attending or Unknown
Total Possible	Display only		Total possible is derived from subtracting Total value from Total Attending value

Table 16–3 Graduation Ceremony Window Description

Field Name	Type	Features	Description
Total	Display only		Graduands with statuses of potential or eligible to graduate, approved, waiting for approval, attending or unknown
Notes		Button	Opens the Graduation Notes window Note: Can be used to enter a description of the ceremony.
Graduands		Button	Opens the Ceremony Graduands window in the context of the selected ceremony
Award Ceremony		Button	Opens the Award Ceremony window to enter details of the programs and unit sets for which awards are to be presented in the selected ceremony

16.2.2 Setting Up Graduation Ceremony Notes IGSGR010

Many types of notes can be created for a ceremony. Each type reflects the purpose of the notes associated with it. Graduation ceremony note types are created in the Graduation Note Types window.

The graduation ceremony notes procedure enters additional information about a graduation ceremony in the form of a note.

Prerequisites

Graduation Note Types IGSGR003

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Graduation Ceremony Notes > Graduation Ceremony Notes window

Steps

1. Query the appropriate record.
2. Enter data in appropriate fields.
3. Save your work.

Note: Notes can be created, stored, and retrieved in text format.

16.2.3 Setting Up Award Ceremony IGSGR008

The Award Ceremony window enters awards to present at each ceremony within a ceremony round, after a ceremony round and its associated ceremonies are defined in the Graduation Ceremony window. An Order of Ceremony number assigned to each award indicates its order of presentation in the ceremony.

Most awards are directly related to programs or program versions, but honorary degrees must also be entered in this window. Awards are maintained in the Awards window.

In this window, graduands can be grouped by program version and award combination, or by award code.

Program awards can be grouped by unit set in the Unit Set Ceremony window, accessed from the Award Ceremony window, in the following instances:

- awards are divided between ceremonies when the award involves many graduands who are divided between ceremonies according to their major or majors
- graduands are presented in alphabetical order within their unit set, rather than within the award

Awards are assigned to program versions in the Program Awards window, accessed through the Basic Program Details window.

The groups established in the Award Ceremony window and the Unit Set Ceremony window are the basis for allocating graduands to ceremonies in the Manage Allocation of Graduands to Ceremonies concurrent process, and placing them in order of presentation within a ceremony in the Set Graduand Order in Presentation concurrent process.

The Unit Set Group label indicates that a program award is grouped by unit set in the Unit Set Ceremony window.

The following table describes values in the Attending, Possible, and Total fields of the Award Ceremony window. The values are determined by graduand status, graduand approval status, and graduand type. The values reflect the latest

information about graduand attendance, not including guests, for the ceremony, and are calculated each time a record is queried.

Table 16–4 Attending, Possible, and Total Field Descriptions

Field Name	Description
Attending	Number of graduands with Eligible, Approved or Waiting status indicating they are attending
Possible	Number equal to Total field value minus Attending field value
Total	Number of graduands with Potential, Eligible, Approved, Waiting status and indicating they are attending or their intention is unknown

If after running the Manage Allocation of Graduands to Ceremonies concurrent process the number of graduands in each ceremony is not balanced, one or more award records can be closed and added to other ceremonies. When the Manage Allocation of Graduands to Ceremonies concurrent process is run again, the graduands are reallocated to another ceremony associated with their award, if one exists.

Prerequisites

Programs IGSPS013

Awards IGSPS008

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Award Ceremony > Award Ceremony window

Note: The Award Ceremony window can also be accessed from the Graduation Ceremony window.

Steps

1. Query the appropriate record.
2. Enter data in appropriate fields.
3. In the Order in Ceremony field, enter a number indicating the order the awards are presented in the ceremony.

Typically, the number must be unique, but can be duplicated for program awards if two different program versions have the same award code and graduands are presented in alphabetic order within the award, rather than the program version.

4. For program awards, in the Program Code field, select a program code from the List of values.

Active and inactive programs appear in the List of values and planned programs do not.

Closed program are displayed, but cannot be selected.

If multiple versions exist, select a version from the List of values.

Closed awards appear in the List of values, but cannot be selected.

A warning appears if a program version is selected but no students with program attempts for that program version exist.

For program versions with a single award, the award code appears.

5. Optionally, click **Graduands** to open the Ceremony Graduands window, listing graduands in the ceremony selected.
6. Optionally, click **Unit Set Groups** to open the Unit Set Ceremony window and enter unit set groups, allowing graduands to be ordered by group within a program and award combination or within an award that is ordered across program versions.
7. Save your work.

16.2.4 Setting Up Unit Set Ceremony IGSGR009

A program award entered in the Award Ceremony window is subdivided into groups of unit sets related to it. This is done to split an award across ceremonies and to present graduates in alphabetical order within their unit set grouping rather than in straight alphabetical order within the award.

For example, if the award involves large numbers of graduates who are to be divided between ceremonies according to their major, the groups are placed in order of presentation within the award, with their component unit sets listed within the group.

Unit set groups are created solely for use in the Graduation windows and have no wider applicability.

The unit set ceremony procedure enters constituent unit set groups for program awards.

Allocating Graduands

The institution can choose to subdivide only some awards into unit set groups within any particular ceremony. The decision to subdivide into unit sets or groups has certain implications.

- Unless the process allocating graduands to ceremonies is instructed to ignore unit sets

If a graduand has one or more primary unit set attempts for a program, then they must match exactly the unit sets entered as a group against the relevant program award. If not, the graduand is not allocated to the ceremony

- If some graduates are eligible for a specific award after studying one unit set, and others are eligible after two, then unit set groups must be entered in both cases.
- Graduates who do not have a unit set attempt for the program are allocated to the ceremony at program award level.

For example, the following table describes a program version, S300/2, that has been divided and ordered into two unit set groups. The unit set group comprising the unit sets ECMJ and RBMJ has a title formed by concatenating the two unit set titles

Table 16–5 Program Version Example

Program Version	Award	Order	Unit Set Group	Unit Sets	Award Order
S300/2	1188	1	Electronics Major & Robotics Major	ECMJ RBMJ	1
			Manufacturing Major	MFMJ	2
M300/1	1002	2	Accounting Major & Banking and Finance Major	ACMJ001 BFMJ001	1
			Economics Major	ECMJ001	2
M300D/1	1002	2	Accounting Major & Banking and Finance Major	ACMJ001 BFMJ0001	1

Prerequisites

Unit Sets IGSPS065

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Graduation > Award Ceremony > Award Ceremony window

Steps

1. In the Award Ceremony window, click **Unit Set Groups** to open the Unit Set Ceremony window.
2. Enter data in appropriate fields.
3. In the Award Ceremony Unit Set Group region, enter a number to signify the order of presentation within the program award.

Note: The override title, if provided, is substituted wherever a group title is unsuitable or two versions of the same unit set are included in the group.

4. Optionally, enter an override title.
5. In the Award Ceremony Unit Set region, enter a number for each component unit set.

Note: This affects concatenation of group titles and it does not control ordering.

6. Select a unit set code.
7. Optionally, click **Graduands** to open the Ceremony Graduands window and view the list of graduates in the selected unit set group.
8. Save your work.

Guidelines

The following information applies to this procedure:

- If a unit set group contains multiple unit sets, the graduate ceremony allocation process considers graduates with attempts in all unit sets within the group.
- Administrative unit sets cannot be entered against program awards.
- If the unit set groups are not added to another ceremony, the graduands are not allocated to a ceremony.
- The group title appears in ceremony lists.

- Combinations of the graduate status, graduate approval status, and graduate type are used to determine totals.

Records: Order Documents

17.1 Order Documents Configuration

The back office document setup windows enable users to configure the self service screens for Order Document functionality.

17.1.1 Setting Up Delivery Method Types IGSAS066

Use this procedure to set up delivery method types for self service users. Each document in an order requires a delivery method (examples include Courier and US Postal) to be associated with it. Each delivery method has a fee associated with it.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Order Documents > Setup Delivery Methods window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 17–1 Delivery Method Types Window Description

Field Name	Type	Features	Description
Delivery Method Type	Required		Unique delivery method type Note: Values must be entered in upper case only.
Description	Required		Delivery method type description
System Delivery Method Type	Required	List of values	A System delivery method type must be associated with each user-defined Delivery method type
Closed	Optional	Check box	If selected, indicates that the delivery method type cannot be used further

17.1.2 Order Document Lookups

Order Documents has an extensible lookup type named IGS_AS_DOCUMENT_SUB_TYPE. The seeded values for this lookup type are:

- CONTINUING_EDUCATION
- ENCERT
- LIFE_TIME_TRANS
- OFFICIAL
- OTHERS
- UNOFFICIAL

During setup, additional values may be created to meet specific needs of the institution.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Lookups

Steps

1. In the Type field, enter IGS_AS_DOCUMENT_SUB_TYPE.
2. Enter user-defined codes.

17.1.3 Document Request Processing Setup IGSAS067

The document request processing setup procedure enables users to enable specific documents and choose the options that govern the behavior of the Order Documents self-service functionality.

Prerequisites

Fee Types IGSFI012

Responsibility

Oracle Student System Super User

Navigation

Academic Records > Order Documents > Setup Processing Options > Document Request Processing Setup window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 17–2 Document Request Processing Setup Window Description

Field Name	Type	Features	Description
Provide Transcripts	optional	check box	if selected, users can order for the transcripts
Allow Lifetime Transcript fee to be paid	optional	check box	institutions provide lifetime transcript service; if selected, lifetime transcript service plan can be created and any self service user can select this option
Allow all Academic history to be combined in one document	optional	check box	if selected, combines all academic history into one document and the check box Include all above appears in the list of careers and programs to select a type of transcript
Do not allow Transcript to be requested if Transcript Hold Exists	optional	check box	if selected, prevents a transcript order from being accepted by the system so long as there is a Transcript Hold placed against the student Note: Users can either select this check box or Allow Transcript Request But Delay Delivery Until Hold Is Released check box.

Table 17-2 Document Request Processing Setup Window Description

Field Name	Type	Features	Description
Allow Transcript request but delay delivery until hold is released	optional	check box	if selected, allows transcript but delays delivery until hold is released Note: If the system finds a Transcript Hold and it displays a message in the Order Summary page informing the user that transcripts can be ordered but delivery will be delayed until the hold is removed.
Provide Enrollment Certification	optional	check box	if selected, allows the user to request Enrollment Certificates
Enable "Bill me Later" option for Current Students	optional	check box	if selected, allows the student to account the charges related to document order towards regular billing account maintained in Student Finance subsystem if not selected, the student can only pay through the credit card
Provide Duplicate Documents	optional	check box	If selected, duplicate document request processing is enabled and institutions must decide whether the Duplicate Document is charged for production and delivery respectively
We can deliver documents via EDI	optional	check box	if selected, delivers documents via EDI Note: This functionality has no current usage. EDI will be supported in a future release of Oracle Student System.
Use EDI to send Documents to EDI partners	optional	check box	if selected, indicates that the university supports EDI and can deliver documents by EDI Note: This functionality has no current usage. EDI will be supported in a future release of Oracle Student System.
Charge Document Fee	optional	check box	If selected, if duplicate documents are provided then is a fee charged for the document processing and production
Charge Delivery Fee	optional	check box	If selected, if duplicate documents are provided then is a fee charged for the delivery of that document
NOTIFY	Required	List of values	Administrator's AOL User ID Show all the application users stored in AOL users entity
Document Fee Tab			

Table 17–2 Document Request Processing Setup Window Description

Field Name	Type	Features	Description
Document Type	required	list of values	document type (examples include Office Transcript, Unofficial Transcript, Enrollment Certificate) Note: For the document type of Lifetime Transcript Services, the range fields are disabled as lifetime is not associated with the number of copies.
Number of copies From	optional		minimum number of transcript copies required
Number of copies To	optional		maximum number of transcript copies required
One time	optional	radio button	If selected, charges are computed at the rate designated for entire set of documents within the specified range
Per Copy	optional	radio button	if selected, charges are computed at the rate designated for each document within the specified range
Amount	required		amount charged to student for a specified transcript request
Fee Type	required	list of values	fee type associated with the charge
Delivery Tab			
Delivery Type	required	list of values	document delivery type
Amount	required		delivery amount based on delivery method
Fee Type	required	list of values	
Transcript Service Plans			
Plan Type	Required		Type of the service plan. It can be either system defined or user entered User can describe either a system-defined service plan type or create a new user-defined type. The system defined values come from the Transcript Service Plan lookup type; values include Lifetime Transcript and Free Transcripts
Unlimited	Optional	Check box	If selected, the service plan type provides transcripts on an unlimited basis

Table 17–2 Document Request Processing Setup Window Description

Field Name	Type	Features	Description
Quantity Limit	Optional; Required if Unlimited is not checked		The limit if the service plan type provides limited transcripts Valid value is any non-negative, non-zero quantity. You cannot enter a limit if the plan type is Lifetime Transcript
Period of Plan	Required	List of values	Valid term for service plan type
Total Periods Covered	Optional		Term for which the service plan is valid
Fee Amount	Required		Amount charged for the Service Plan Type
Closed	Required	Check box	If selected, indicates that the service plan type is closed and cannot be used in the future Note: If the you do not offer either free transcripts or lifetime transcripts (the seeded plan types), if you select this check box, these seeded values are nullified and are not offered as service options to requesters in self-service
Document Purposes			
Code	Required		User-defined code to identify a unique document purpose
Description	Required		Description for document purpose code
Document Type	Required	List of values	Document type for which this purpose is applicable
Closed	Required	Check box	If selected, the document purpose can be used in the system
Alias Tab			
Order of Display on Transcript	Display only		Order of displaying the Alias Type while Producing the Document
Alias Type	Required	List of values	Alias Type Description is shown while Producing the Document
Order of Display on Transcript	Display only		Order of displaying the Alias Type while Producing the Document
Alias Type	Required	List of values	Alias Type Description is shown while Producing the Document

Student Finance

18.1 Student Finance Overview

The Student Finance subsystem manages the student and related sponsor account activity. This includes the assessment of tuition and fees, and payments and deposits received from students and sponsors, as well as disbursements of financial aid from the Financial Aid subsystem.

The Student Finance subsystem operates as a true subledger to Oracle General Ledger for student related financial activity. It can also operate with non-Oracle General Ledger.

Student Finance windows are used to set up the data framework for fee processing. Once the data framework is established, little additional data entry is required. Daily work mainly consists of running and monitoring concurrent processes and reports, and using a small number of windows to query and enter fee related adjustments to individual student records.

A data framework is created for each fee period within an institution's financial year. This framework can be rolled over from year to year and modifications can be made as required. Fee processing follows a cycle based on a fee period.

Terminology

The following table lists Student Finance terminology.

Table 18–1 Student Finance Terminology

Term	Definition
fee type	name of a fee or charge. Examples include TUITION; LAB-FEE; and GSF, or general service fee.

Table 18–1 Student Finance Terminology

Term	Definition
fee category	describes a set of fee payable by a student for a program attempt. A student is assigned a fee category through the Admissions or Enrollment subsystem when applying for admission to the institution or enrolling in the institution. In the Student Finance subsystem, a fees administrator sets up fee types and fee categories and assigns fee types to the categories. One fee type can be included in many categories. A single fee type within a fee category is a fee liability. The fee assessment process matches students and fees by matching fee categories.
fee period	periods of time set up with fees to be assessed for students enrolled in those periods; also referred to as fee calendar instance or fee assessment period. Subsystem data is set up within specific fee periods. For example, a fee period called FEE-SEM1 runs from 01-JAN-1999 to 30-JUN-1999. Fee categories INTERNL and DOMESTIC are set up for this period. Students who enroll between these two dates are liable for the fees in their respective categories. Note: All fee periods are connected to a financial calendar representing an institution's fiscal year.
start and end date alias	beginning and termination dates, linked to a fee period, marking limits when fee assessment is run. Start and end date aliases do not have to correspond to start and end dates of a fee period. If required, start date alias can occur before teaching begins. Note: Start and end date aliases can be set for different operations. For example, a start and end date alias can indicate a period when a sponsor pays the fees for a student. Note: Start and end date aliases are required.
retro date alias	absolute cutoff point after which fee assessment cannot be run for the fee period. Note: Retro date aliases are optional.

18.2 Student Finance Profile Options

Set up the following Student Finance profile options:

- IGS: Use Funds Authorization
- IGS: Remit To Address Usage
- IGS: Include Waitlist

- IGS: Attendance Type and Attendance Mode

Refer to Appendix A, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the Oracle Applications User's Guide.

18.3 Student Finance Options

This section identifies the fundamental setup required to support the Student Finance subsystem as a whole.

18.3.1 Setting Up System Options - Header IGSFI037

A single record is created using the System Options window. That means, for each installation of the Oracle Student System there can only be one Student Finance System Options setup.

Financial Accounting functionality resides in the Student Finance subsystem within the Oracle Student System. All transactions, including charges, credits and applications that occur in the Student Finance subsystem create accounting activity that comply with Generally Accepted Accounting Principles (GAAP). There are several key system options that should be defined at the header level:

- Oracle General Ledger
- Accounting Method
- Fee Calculation Method
- Name
- Currency
- Next Number
- Include Planned Credits

18.3.1.1 Oracle General Ledger

Institution that are using Oracle General Ledger will select 'Yes' for this option. All transactions created in the Student Finance subsystem will be transferred to the Oracle General Ledger through the General Ledger Interface Process.

When Oracle General Ledger is installed, Student Finance uses the standard Oracle accounting flexfield code combinations to record accounting information.

18.3.1.2 Accounting Method

Institutions can implement in the accrual or cash method of accounting.

18.3.1.3 Fee Calculation Method

Institution has the option to implement using the Asses by Program, Assess by Career or Assess by Primary Career. The following discussion explains the different options.

Program and Career Differences

The following topics are described in this section:

- Institution Attendance Types
- Fee Assessment

Institution Attendance Types

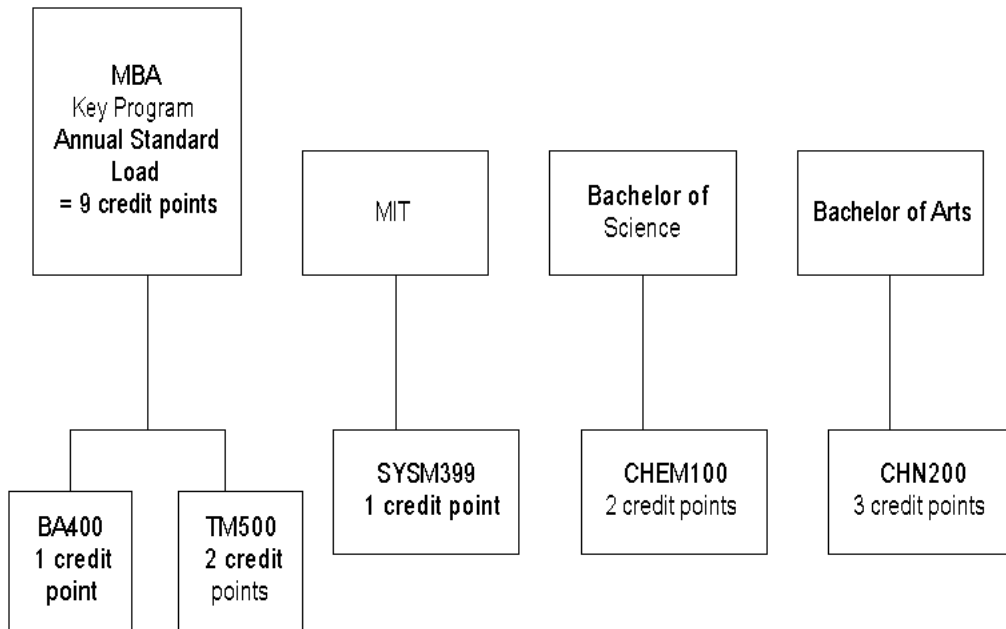
Institution attendance type is based on primary career load. Institutions are required to manually designate one program as the key program through the Key Program check box on the Student Program Attempt window, which in turn determines the primary career in the career structure model.

The following topics are described in this section:

- Program Centric Model
- Career Centric Model

Program Centric Model

Figure 18–1 shows an example of a student's annual standard load of key program for a program centric model.

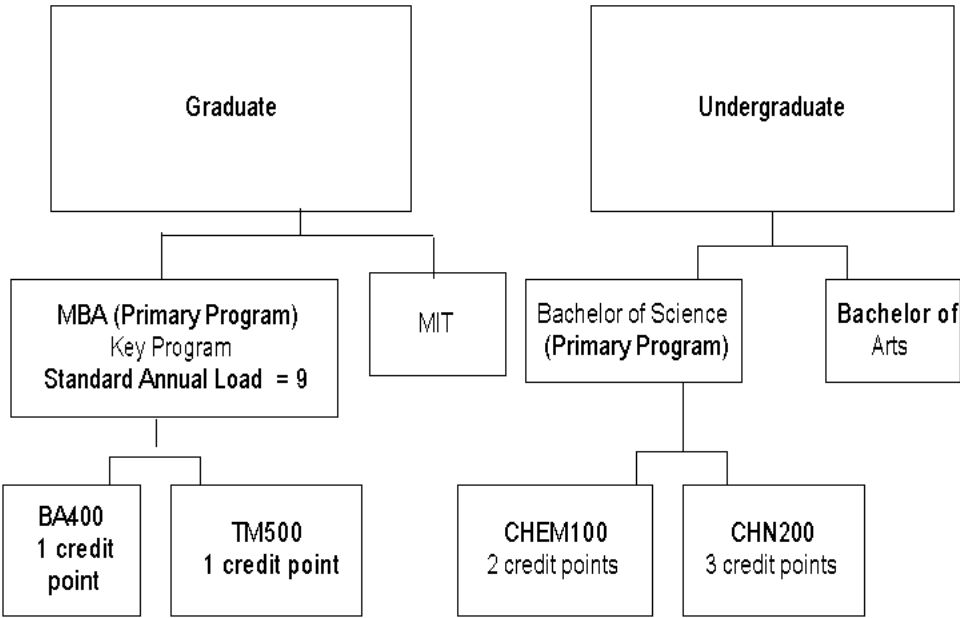
Figure 18–1 Program Centric Model

To calculate the overall attendance type, divide the sum of credit points for all programs, in this case, 9, by the annual standard load of key program, in this case, 9. This results in 1 Full Time Equivalent. Using the attendance type set up described above, then this student in this example has an overall institution type of Full Time.

Career Centric Model

Figure 18–2 shows an example of a student's annual load for key program for a career centric model.

Figure 18–2 Career Centric Model



To calculate the overall attendance type, divide all credit points, in this case, 7, by the standard annual load of the key program, in this case, 9. This results in a 0.777 FTE.

The following table describes an example of attendance type setup.

Table 18–2 Example of Attendance Type Setup

Attendance Type	Range
Full-time	>0.751
Three Fourths-time	0.510 to 0.750
Half-time	0.251 to 0.500
Less than half-time	0 to 0.250

According to this example, the student has an overall institution attendance type of Full Time.

Fee Assessment

The following topics are described in this section:

- Assess By Programs
- Assess By Career
- Assess By Primary Career

Assess By Programs

Institutions have the option to assess fees differently than in Figure 18–1. The option is that fee calculation ignores key program and assesses fees for each program. The attendance type in the rate table is based on the attendance type for each program. The class standing in the rate table is based on the class standing of each program.

The following topics are described in this section:

- Charge Element Calculation
- Element Ranges
- Charge Rate Determination

Charge Element Calculation

If the charge element calculation is based on unit based charge methods, for example, charged by unit or by credit point, then the units or credit points are totalled by each program before assessment and assessed against the rate of each program. If a student is enrolled in more than one program concurrently, fees with a system fee trigger category of Institutn are calculated against both programs, though the amounts shown represent a single assessment. If assessment is unit based and the trigger is Institutn, then users must sum the load for student unit attempts across all applicable programs where this fee is a liability.

Element Ranges

Users must sum all loads for each student program attempt for regular fees. For fees with a system fee trigger category of Institutn, users must sum all the applicable student unit attempt, SUA, load for each fee liability. Since institution fees are assessed only once, all the applicable student program attempts SPA, are considered only once. The SUAs within those applicable SPAs are summed for total element ranges.

Charge Rate Determination

The following table describes charge rate determination.

Table 18–3 Charge Rate Determination for Assessment by Program

Charge Rate	Determination
program	program at the SPA
attendance type	program attendance type
attendance mode	no change from present calculation
organization unit code	use organization unit code at the SPA if the charge method of the fee is FLATRATE; if the charge method is unit based, use the organization unit code from the SUA; if not found at the SUA, use the organization unit code from the unit section definition
class standing	class standing for the student program attempt
location code	from SPA if FLATRATE charge method; from SUA if unit based charge method

The following table describes institution fees for charge rate determination.

Table 18–4 Institution Fees for Charge Rate Determination for Program

Charge Rate	Determination
program	N/A
attendance type	Student System uses institution attendance type, which sums the load and then divides by the key program annual load
attendance mode	no change from present calculation; if there is more than one mode across units, use composite
organization unit code	N/A
class standing	N/A
location code	N/A

Assess By Career

Institutions have the option to assess fees differently than in Figure 18–2. The option is that fee calculation ignores key program and assesses fees for each career, which is derived from the primary program. Multiple careers will yield multiple

assessments accept for fee types with the trigger of Institutn. The attendance type in the rate table is based on units in each career, or primary program. The class standing in the rate table is based on the class standing of each career, or primary program.

The following topics are described in this section:

- Charge Element Calculation
- Element Ranges
- Charge Rate Determination

Charge Element Calculation

If the fee is a regular fee type with unit based charge method, then users must sum the load from all SUA for the primary program for the career. For institution fee types with unit based charge method, then users must sum the load for all SUAs for the applicable primary programs. Only one institution fee is charged regardless of the number of primary programs.

Element Ranges

Users must sum all loads for the SUAs for the primary program of each career for regular fees. For institution fees, users must sum all SUAs for all applicable primary programs.

Charge Rate Determination

The following table describes charge rate determination.

Table 18–5 Charge Rate Determination for Assessment by Career

Charge Rate	Determination
program	primary program for each career
attendance type	career attendance type; this is the sum of SUAs linked to each primary program divided by the primary program annual load and them compared to the program attendance type setup
attendance mode	derived from the SUA associated with each primary program
organization unit code	use organization unit code set up at each primary program level if the charge method of the fee is Flatrate; if the charge method is unit based, then use he organizational unit code from the SUA; if not found at SUA, use the organization unit code from the unit section definition

Table 18–5 Charge Rate Determination for Assessment by Career

Charge Rate	Determination
class standing	career class standing
location code	from each primary program if Flatrate is the charge method; from SUA if unit based charge method
institution fees	N/A

The following table describes institution fees for charge rate determination.

Table 18–6 Institution Fees for Charge Rate Determination for Career

Charge Rate	Determination
program	assess by key program
attendance type	sum all units across applicable primary programs that have that fee liability; if a fee is not in the fee category those units are not subject to assessment Note: Career attendance type or institution attendance type cannot be used.
attendance mode	assesses all units across applicable careers; if modes are different, use composite trigger
organization unit code	N/A
class standing	class standing of the key program
location code	N/A

Assess By Primary Career

Institutions have the option to assess fees differently than in Figure 18–2. The option is that fee calculation is based on the fee category for the primary career as determined by the key program indicator. The attendance type in the rate table is based on institution attendance type. The class standing in the rate table is based on the class standing of the primary career. Only one rate is assessed. If the charge element is unit or credit points, then all units or credit points for all programs are totaled prior to assessing against the rate for primary career.

The following topics are described in this section:

- Charge Element Calculation
- Element Ranges

■ Charge Rate Determination

Charge Element Calculation

If the fee is a regular fee type with unit based charge method, users must sum the load from all SUA for the primary program for all of the careers. For institution fee types with unit based charge method, users must sum the load from all SUA for the primary program for all of the careers.

Element Ranges

Users must sum all loads for the SUAs for the primary program for regular fees. For institution fees, users must sum all SUAs for regular fees.

Charge Rate Determination

The following table describes charge rate determination.

Table 18–7 Charge Rate Determination for Assessment by Primary Career

Charge Rate	Determination
program	key program
attendance type	sum of SUAs linked to all primary programs divided by the key primary program annual load and then compared to the program attendance type setup
attendance mode	mode attached to key program
organization unit code	use organization unit code set up at the key program level if the charge method of the fee is Flatrate; if the charge method is unit based, then use he organizational unit code from the SUA; if not found at SUA, use the organization unit code from the unit section definition
class standing	class standing of the key program
location code	from key program if Flatrate is the charge method; from SUA if unit based charge method

The following table describes institution fees for charge rate determination.

Table 18–8 Institution Fees for Charge Rate Determination for Primary Career

Charge Rate	Determination
program	key program across all careers

Table 18–8 Institution Fees for Charge Rate Determination for Primary Career

Charge Rate	Determination
attendance type	institution attendance type for key program
attendance mode	mode attached to key program
organization unit code	N/A
class standing	class standing attached to key program
location code	N/A

18.3.1.4 Name

Institutions using Oracle General Ledger will need to select a Set of Books Name.

18.3.1.5 Currency

Institutions that are not using Oracle General Ledger will need to define a functional currency. For institutions using Oracle General Ledger this will default based on the set of books.

18.3.1.6 Next Number

This represent the charge numbers in the Student Finance subsystem. Institutions can set the initial charge number.

18.3.1.7 Include Planned Credits

Indicates planned credits in the Billing Extract Process.

WARNING: After you have defined the header level options and saved this information, all options excluding the Include Planned Credits option cannot be update. The initial selection controls the operation of several windows and concurrent processes. The institutions only option would be to reinstall the Oracle Student System.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > System > System Options window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–9 System Options Window Description

Field Name	Type	Features	Description
Oracle General Ledger	Required		Indicates if Oracle General Ledger is installed Values are Yes, No
Accounting Method	Required		System options accounting method Values are Cash and Accrual
Fee Calculation Method	Required		Fee calculation method Values are Assess by Career, Assess by Primary Career, and Assess by Program
Set of Books	Required	List of values	Set of books name
Currency	Required	List of values	Indicates the functional currency If you select the value for Oracle Financials as Yes and select a set of books in the Name field, then the currency attached to a particular set of books Defaults in the Currency field. You cannot enter or update a value in this field if you indicate that Oracle Financials is installed. If you select the value for Oracle Financials as No, then you can enter a value for the Currency field. Note: After you save your work, you cannot update the value in the Currency field.
Next Number	Default, display only		next charge number
Include Planned Credits	Optional		Indicates planned credits in the Billing Extract Process. values are Yes, No. When the value of this field is null, it is considered as No in all Student Finance processes and windows that use this field.
Refunds Tab			
Liability Account Flex Field	Optional	List of values	Liability account flexfield Note: This field is enabled when Oracle Financials is installed.

Table 18–9 System Options Window Description

Field Name	Type	Features	Description
Liability Account Code	Optional		Liability account code Note: This field is enabled when Oracle Financials is not installed.
Clearing Account Flex Field	Optional	List of values	clearing account flexfield Note: This field is enabled when Oracle Financials is installed.
Clearing Account Code	Optional		Clearing account code Note: This field is enabled when Oracle Financials is not installed.
Description	Display only		Account code description
Refund Destination	Optional		Valid values include Oracle Payables, Other, and Blank Note: If the Oracle General Ledger field is set to No, Oracle Payables is not a valid value.
Payables Operating Unit	Conditionally Required		Indicates which org ID should be used to create the supplier site in Oracle Payables by the Supplier API called by the Transfer Refund to Oracle Payables concurrent process; required if the refund destination is set to Oracle Payables and the Oracle Applications Installation is Multi Org Enabled. This field is disabled if the value in the Refund Destination field is Blank or Other.
Default Supplier Site Name	Conditionally Required		Supplier site names in Oracle Payables; required if the refund destination is Oracle Payables
Calendar Configurations Tab			
Refund Add Drop Cut Off Date	Optional	List of values	Refund add drop cut off date
Program Change Enforcement Date	Optional	List of values	Program change enforcement date
GL Accounts Tab			
Cash Account Flexfield	Optional	List of values	
Cash Account Code			

Table 18–9 System Options Window Description

Field Name	Type	Features	Description
Unapplied Account Flexfield	Optional	List of values	Unapplied accounts
Unapplied Account Code			
Receivables Account Flexfield	Optional	List of values	Receivables revenue
Receivables Account Code			
Revenue Account Code			
Description	Display only		Automatically populated
Account Code	Display only		Account code
Receivable Defaults Tab			
LockBox Region			
LockBox Context	Optional	List of values	Receivables lockbox context
LockBox Number Attribute	Optional	List of values	Receivables lockbox number attribute
Revenue Segments Tab			
Segment	Display only		Segment; automatically populated
Revenue Accounts	Optional	List of values	Segment values
Lockbox Tab			
Lockbox Number	Required	List of values	Lockbox number

18.3.2 Setting Up Fee Posting Accounts IGSFI004

The financial accounting set up enables users to create user-defined accounting information when charge transactions, credit transactions, and application of credits are created. These transactions originate in the Student Finance subsystem and then are passed to an interface table. This interface table can be used to support a custom

interface process to transfer general ledger level transactions to a non-Oracle financial system.

The fee posting accounts procedure provides a method for capturing account codes assigned to fee types, programs, organization, units, unit sections, and location.

The account code here is a free text format kind of field and can be made inactive by using the Closed check box. You cannot delete an account code.

Prerequisites

Implementation of interface to non-Oracle financial system

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Fee Posting Accounts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Fee Posting Accounts Window Description

Table 18–10 Fee Posting Accounts Window Description

Field Name	Type	Features	Description
Account Code	Required		Account code name
Description	Required		Account code description
Closed	Optional	Check box	If selected, prevents further selection of a fee posting account

18.3.3 Setting Up Account Hierarchy IGSFI057

Users can indicate the order, or hierarchy, in which entities are considered for individual accounting segments to arrive at a complete accounting flexfield. In the Account Hierarchy window, users can specify one account hierarchy as Default at any time.

Users can further define the order in which various entities are considered for a particular account hierarchy in the Hierarchy Order window. The entities to derive revenue account for a charge transaction can be chosen from unit section, location, fee type, program, organization, and units.

Account hierarchies are assigned at the fee type calendar instance level. For each possible fee type calendar instance, users can assign a uniquely defined hierarchy.

Prerequisites

System Options IGSFI037

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Account Hierarchy window

Steps

1. Enter data in each field of the window as described in the table.
2. Click Hierarchy Order.
3. The Hierarchy Order IGSFI058 window appears.
4. .Enter data in each field of the window as described in the table. Save your work.

Table 18–11 Account Hierarchy Window Description

Field Name	Type	Features	Description
Name	Required		Account hierarchy name
Description	Required		Account hierarchy description
Default	Optional	Check box	If selected, indicates that account hierarchy is set as Default. Only one account hierarchy can be set as default.
Zero Fill	Optional	Check box	If selected, enables build account process to fill incomplete segments after searching the entire hierarchy.
Closed	Optional	Check box	If selected, prevents account hierarchy from further use
Hierarchy Order		Button	Opens the Hierarchy Order window

Table 18–12 Hierarchy Order Window Description

Field Name	Type	Features	Description
Name	Default display only		Account hierarchy name
Description	Default Display only		Account hierarchy description
Hierarchy Order Region			
Order Sequence	Required		Order in which various entities are to be considered for a particular account hierarchy
Entity	Required	List of values	Account hierarchy entity

18.3.4 Setting Up System Options - Tabs IGSFI037

A single record is created using this System Options window. That means for the each installation of the Oracle Student System there can only be one Student Finance System Options setup.

Returning to this window, the institution will define additional information in the following tabs:

- Refunds
- Calendar Configuration
- GL Accounts
- Revenue Segments
- Receivable Defaults
- Lockbox

18.3.4.1 Refunds

In this tab the institution can define the following:

- Accounting
- Refund Destination
- Default Supplier Site Name

Accounting

The institution defines the default accounts that will be used for liability and clearing.

Refund Destination

The institution can select the destination for the refund transactions created by the Student Finance subsystem.

The Refund Destination will default to Blank.

If the Oracle General Ledger option is set to No at the header level, then the Refund Destination cannot be Oracle Payables.

If Multiple Organization has been enabled as part of the Oracle Financials installation and the Refund Destination is Oracle Payables, then the Payables Operating Unit option will be required

The Payables Operating Unit is updateable as long as there are no records defined in the Supplier Relationship window.

See the Supplier Relationship window section in the *Oracle Student System User's Guide* for more information.

Default Supplier Site Name

The institution will be required to supply a default supplier site name when the refund destination is Oracle Payables. This will be used by the Transfer Refunds to Oracle Payables process when a new supplier site needs to be created.

18.3.4.2 Calendar Configuration

The institution can define the following date controls:

- Refund Add Drop Cut Off Date
- Program Change Enforcement Date

Refund Add Drop Cut Off Date

The institution can define a date that prior to this date will prevent the refund process from creating refunds against the student account.

Program Change Enforcement Date

The institution can define a date where by any changes to the program after that date will not result in a fee assessment adjustment.

18.3.4.3 GL Accounts

The institution defines the following accounts that will be used to support transactions that are transferred to either the Oracle or non-Oracle General Ledger:

- Cash
- Unapplied
- Receivables
- Revenue (non-Oracle General Ledger)

Cash

Institutions define a single cash account to be used for the relevant Student Finance subsystem transactions.

Unapplied

Institutions define a single unapplied account to be used for the relevant Student Finance subsystem transactions.

Receivables

Institutions define a single receivables account to be used for the relevant Student Finance subsystem transactions.

Revenue (non-Oracle General Ledger)

For institutions using a non-Oracle General Ledger, a default revenue account can be defined at the system level. This revenue account would be used for all relevant transactions where a revenue account was not supplied at a lower level.

18.3.4.4 Revenue Segments

For institutions using Oracle General Ledger, default values can be defined for each accounting flexfield segment at the system level. These segment values would be used to build the accounting flexfield for all relevant transactions where a segment value was not supplied at a lower level.

18.3.4.5 Receivable Defaults

Institution defines receivable default information to support the use of the Oracle Receivable lockbox functionality.

18.3.4.6 Lockbox

Institution defines the lockbox number.

Prerequisites

System Options (Header) IGSFI037

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > System > System Options window

Steps

Enter data in each field of the window as described in "Setting Up System Options - Header IGSFI037" in the table. Save your work.

18.4 Revenue Accounting

Revenue accounts can be recorded in the following seven entities to derive a revenue account flexfield or revenue account code:

- Organization
- Location
- Program
- Unit
- Unit Section
- Fee Type

Oracle General Ledger

If an institution is using Oracle General Ledger the Segments tab is enabled in the Account setup forms. This tab is used to capture values for each accounting flexfield segment. The segment values are used in the Build Accounts Process to derive a complete revenue account.

Non-Oracle General Ledger

If an institution is using a non-Oracle General Ledger the Accounts tab is enabled. This tab will be used to define accounts.

18.4.1 Setting Up Program Accounts IGSFI059

Institutions can define segment values or accounts for specific programs.

Prerequisites

System Options IGSFI037

Programs IGSPS013

If using Oracle General Ledger, it will need to be implemented.

If using non-Oracle General Ledger, the account structure will need to be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Accounts > Program Accounts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–13 Program Accounts Window Description

Field Name	Type	Features	Description
Program Code	Default, display only		Program account code name
Version Number	Default, display only		Program account code version number
Program Status	Default, display only		Program account code status
Title	Default, display only		Program account code title
Segments and Accounts Region			
Segments Tab			
Segment	Required		Revenue account segment name
Revenue Account	Optional		Revenue account segment values
Accounts Tab			
Revenue Account Code	Display only	List of values	Revenue account code

18.4.2 Setting Up Unit Accounts IGSFI060

Institutions can define segment values or accounts for specific units.

Prerequisites

System Options IGSFI037

Units IGSPS047

If using Oracle General Ledger, it will need to be implemented.

If using non-Oracle General Ledger, the account structure will need to be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Accounts > Unit Accounts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–14 Unit Accounts Window Description

Field Name	Type	Features	Description
Unit Code	Default, display only		Unit account code name
Version Number	Default, display only		Unit account code version number
Unit Status	Default, display only		Unit account code status
Title	Default, display on		Unit account code title
Segments and Accounts Region			
Segments Tab			
Segment	Required		Revenue account segment name
Revenue Account	Optional		Revenue account segment values
Accounts Tab			
Revenue Account Code	Display only	List of values	Revenue account code

18.4.3 Setting Up Unit Section Accounts IGSFI061

Institutions can define segment values or accounts for specific unit sections.

Prerequisites

System Options IGSFI037

Unit Section IGSPS083

If using Oracle General Ledger, it will need to be implemented.

If using non-Oracle General Ledger, the account structure will need to be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Accounts > Unit Section Accounts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–15 Unit Section Accounts Window Description

Field Name	Type	Features	Description
Unit Region			
Unit Code	Default, display only		Unit section account code
Unit Version	Default, display only		Unit section account code version
Title	Default, display only		Unit section account code section title
Location	Default, display only		On-campus or off-campus site
Unit Class	Default, display only		Section number or day and time indicator depending on the profile users select
Unit Mode	Default, display only		On campus, off campus, or combination of the two
Teaching Period Region			
Call Number	Default, display only		Teaching period call number
Calendar Type	Default, display only		Teaching period calendar type
Alternate Code	Default, display only		Teaching period alternate code
Effective Dates	Default, display only		Teaching period effective start and end dates
Unit Section Status	Default, display only		Institution-defined unit section status
Unit Section Effective Dates	Default, display only		Unit section start and end dates if different from the teaching period start and end dates
Segments Tab			

Table 18–15 Unit Section Accounts Window Description

Field Name	Type	Features	Description
Segment	Required		Revenue account segment name
Segment Value	Required		Revenue account segment value
Accounts Tab			
Revenue Account Code	Display only	List of values	Revenue account code

18.4.4 Setting Up Organization Accounts IGSFI062

Institutions can define segment values or accounts for specific organizations.

Prerequisites

System Options IGSFI037

Organization Unit IGSOR030

If using Oracle General Ledger, it will need to be implemented.

If using non-Oracle General Ledger, the account structure will need to be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Accounts > Organization Accounts > Organization Accounts window

Steps

Enter data in each field of the Organization Accounts window as described in the table. Save your work.

Table 18–16 Organization Accounts Window Description

Field Name	Type	Features	Description
Org Unit Code	Default display only		Organization unit code
Start Date	Default display only		Organization unit code start date
Description	Default display only		Organization unit code description

Table 18–16 Organization Accounts Window Description

Field Name	Type	Features	Description
Segments and Accounts Region			
Segments Tab			
Segment	Display only		Revenue account segment name
Revenue Account	Optional	List of values	Revenue account segment value
Accounts Tab			
Revenue Account Code	Display only		Revenue account code

18.4.5 Setting Up Location Accounts IGSFI063

Institutions can define segment values or accounts for specific locations

Prerequisites

System Options IGSFI037

Locations IGSOR031

If using Oracle General Ledger, it will need to be implemented.

If using non-Oracle General Ledger, the account structure will need to be defined.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Accounts > Location Accounts window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–17 Location Accounts Window Description

Field Name	Type	Features	Description
Location Code	Default, display only		Location code name and description
Closed	Optional	Check box	If selected, prevents further use of a location account
Segments and Accounts Region			
Segments Tab			
Segment	Display only		Revenue account segment name
Revenue Account	Optional	List of Values	Revenue account segment value
Accounts Tab			
Revenue Account Code	Display only	List of Values	Revenue account code

18.5 Fee Structure

Calculation and schedule data can be stored at various levels, each level determining the scope of a fee. Different windows and screens allow access to data at one of the levels.

Fee classes are functional groupings of fee types. Examples of groupings include Housing and Tuition.

Grouping fee types into fee classes does not set up an application hierarchy within the student account. Grouping fee types into fee classes only enables users to perform Pays Only functionality within Oracle Financial Aid.

For information on Pays Only functionality, see Financial Aid User's Guide.

This section includes the following topics:

- Example with Rate
- Fee Type, Fee Type Levels, and Associated Windows
- Fee Data and Fee Type Levels

Example with Rate

A computer access fee with fee type Comp-Acc is assigned to two fee categories, Intrntl-Ug and Domestc-Ug, and charged at a flat rate of \$75 in the Fee-Sem1 fee period.

If the rate is entered using the Fee Types window, the rate applies to both the Intrntl-Ug and Domestc-Ug fee categories and to students in both these fee categories.

If the rate is entered using the Fee Category Calendar Instance window with the Domestc-Ug fee category selected, the rate only applies to students in the Domestc-Ug fee category.

Fee Type, Fee Type Levels, and Associated Windows

The following table shows the fee types and fee type levels that apply to the Fee Type and Fee Category windows and each scenario outlined in this section.

Table 18–18 Fee Types and Levels and Corresponding Windows

Window	Fee Type	Fee Type Level
Fee Types	all fee types, regardless of category	FTCI, or Fee Type level
Fee Category Calendar Instance, first window	all fee types in a particular category, schedules only	FCCI, or Fee Category level
Fee Category Calendar Instance, second window	single fee type in a particular category	FCFL, or Fee Liability level

Fee Data and Fee Type Levels

The following table summarizes fee data, corresponding fee type levels, and additional information related to fee data. A value of S indicates that fee data can exist at these levels simultaneously and a value of E indicates that fee data can exist at either level, but not both.

The following table shows fee data and fee type levels.

Table 18–19 Fee Data and Fee Type Levels

Fee Data	Fee Type Level	Additional Information
FTCI Level		

Table 18–19 Fee Data and Fee Type Levels

Fee Data	Fee Type Level	Additional Information
schedules	S	see Retention Schedules in this chapter
charge method	E	charge method and rule must be at same level
payment rank	E	N/A
rule	E	N/A
rate	E	see Rate
element ranges	E	see Element Ranges
define trigger type	S	see Define Trigger Type
use triggers	N/A	not applicable to INSTITUTION trigger category

FCCI Level

schedules	S	see Retention Schedules
charge method	N/A	charge method and rule must be at same level
payment rank	N/A	N/A
rule	N/A	N/A
rate	N/A	see Rate
element ranges	N/A	see Element Ranges
define trigger type	N/A	see Define Trigger Type
use triggers	N/A	not applicable to INSTITUTION trigger category

FCFL Level

schedules	S	see Retention Schedules
charge method	E	charge method and rule must be at same level
payment rank	E	N/A
rule	E	N/A
rate	E	see Rate
element ranges	E	see Element Ranges

Table 18–19 Fee Data and Fee Type Levels

Fee Data	Fee Type Level	Additional Information
define trigger type	N/A	see Define Trigger Type
use triggers	S	not applicable to INSTITUTION trigger category

This section includes the following topics:

- Retention Schedules
- Rate
- Element Ranges
- Define Trigger Type

Retention Schedules

The following information applies to retention schedules:

- For fees with an Institutn trigger category, schedules must be set up to operate at the FTCT level. In these cases, if fees do not have a schedule set up to operate at the FTCT level, they cannot have schedules set up to operate at another level, even if they are included in a fee category.
- If a fee type has a schedule set up to operate at the FTCT level, another schedule cannot be set up to operate at the FCFL level, and vice versa.
- If a fee type has a schedule set up to operate at the FTCT level, this schedule overrides one set up to operate at the FCCI level for that fee type only.
- If a fee type has a schedule set up to operate at the FCFL level, this schedule overrides one set up to operate at the FCCI level.

Rate

The following information applies to rate:

- Fees with an INSTITUTION trigger category must have calculation details set up to operate at the FTCT level.
- Charge rate and element ranges must be set up to operate at the same level.
- Rates can be differentiated by level, by any combination of location, attendance type, and attendance mode.

Note: If location, attendance type, and attendance mode attributes do not make rates mutually exclusive, an order of precedence must be set.

Element Ranges

The following information applies to element ranges:

- Element ranges cannot be specified for a fee if the charge method is Flatrate.
- The element range can only be set up to operate at the FTCl level for institution fees.

Define Trigger Type

The following information applies to define trigger types:

- Fees with an Institutn trigger category do not have triggers, can use any charge method, must have all their details set up to operate at the FTCl level, and are levied only once, even if a student has more than one current program attempt.

Fee Type Rates

In this section, rates refer to standard contract rates established through the Fee Assessment Rates window, not contract rates established with individual students in the Contract Fee Assessment Rates window.

Fee type rates are set up in the Fee Assessment Rates window, accessed from the Fee Types window, or from the Fee Category Fee Liability window.

Students are assessed charges based on their unique characteristics and how those characteristics match against attributes that exist in a rate table in Student System. This rate table is created through the Fee Assessment Rates window based on user-defined values.

Multiple rates can be specified for a single fee type, depending on the following rate variables:

- Organization Unit
- Location Code
- Enrollment Attributes
- Nominated and Derived Program Attributes
- Residency
- Class Standing
- Institution

Note: If the criteria entered for a fee type rate do not cover all options, users can enter additional fees through the Ancillary Charges window using rates set up in the Ancillary Rates window and Ancillary Segment window. Users can enter additional external charges through the External Charges window.

Organization Unit

If the Organization field of the Fee Assessment Rates window is populated, Student System will determine which organization the unit is associated with and calculate the fee based on the rate associated with that organization. By setting a higher fee assessment rate, for example, Tuition, as compared to Library Fine, a payment or credit to the student's account will first pay-off the Tuition in full before any portion will be paid as Library Fine. An application hierarchy in only for OTC receipts and credits.

Location Code

Student System uses location codes at different levels, such as Program Location Code and Unit Location Code, for different cases of fee data. For institution triggered fee types, the accounting is not done based upon Course Code, Location code, and Org Unit Code. The Fee Assessment Process makes use of Location Codes at different levels such as Program Location Code and Unit Location Code for different cases of fee data.

For fee types with the trigger category of Institutn, the attributes of student enrollment is not used for identifying the charge rate applicable.

The charge rate varies for individual units, even when the units are in the same program attempt because charge rate is a function of organization unit and location code, both of which can vary at the unit level.

Enrollment Attributes

Certain combinations of criteria are mutually exclusive, for example, two rates with the values full-time and part-time set up with attendance type as the only criterion. However, some combinations of criteria are not mutually exclusive. In these instances, the system follows an order of precedence value given to each criteria combination.

Attendance Type and Attendance Mode

The following list indicates all possible mutually exclusive criteria combinations:

- only criterion is location code, and a rate is given for each possible value of location code

- only criterion is attendance type, and a rate is given for each possible value of attendance type
- only criterion is attendance mode, and a rate is given for each possible value of attendance mode
- criteria are location code and attendance type only, and a rate is given for each possible combination of values of the two criteria
- criteria are location code and attendance mode only, and a rate is given for each possible combination of values of the two criteria
- criteria are attendance type and attendance mode only, and a rate is given for each possible combination of values of the two criteria
- criteria are location code, attendance type, and attendance mode, and a rate is given for each possible combination of values of the three criteria

All other combinations must specify an order of precedence value.

Institutions can set up one rate for programs studied at any location and for any attendance type or mode, and other rates with particular criteria for a limited number of exceptions. For example, one rate can be set up for all options, a second rate can be specified for full-time students at Campus A, and a third rate for on-campus students at Campus B. The exceptional cases must be set up to take precedence over the general case, as shown in the following table.

The following table shows the sample order of precedence rankings.

Table 18–20 Sample Order of Precedence Ranking

Order of Precedence	Location Code	Attendance Type	Attendance Mode	Rate
1	Campus A	full-time	N/A	rate X
2	Campus B	N/A	N	rate Y
3	N/A	N/A	N/A	rate Z

The order of precedence for exceptional cases can be reversed, but the general case must always be listed last. If the general case were listed first, the exceptional cases would never take effect.

An empty criterion field in the Fee Assessment Rates window indicates that the rate applies for any value of that criterion.

Nominated and Derived Program Attributes

For some enrolled students, the values for attendance type and attendance mode values can vary based upon whether it is nominated or not from the values obtained by examining their individual unit enrollments for the program. For example, a student program attempt can have an off-campus attendance mode entered, but for a majority of units, the student can study on campus.

For fee assessment, it is important to understand whether nominated program attributes, those entered for the program attempt, or derived program attributes, determined by examining units being studied, are used. These are based upon a profile setting.

Program Fee Triggers

Program fee triggers can be created in the Program Fee Trigger window to match any or all location, attendance type, and attendance mode attributes of a program attempt. The program fee triggers are matched to nominated program attempt attributes and if a match is made, the student is liable for the fee.

Single Program Attempt Fees

A fee with a trigger category of Program, Unit, Unitset, or Composite, relates to a single program attempt.

A rate with a location specified is matched against a nominated location of the student program attempt. This depends upon the charge method and can match against the unit location also.

A rate with an attendance mode and attendance type specified is matched against a derived attendance type or mode of the student program attempt. This depends on whether nominated or derived values are used.

The derived attendance mode is determined as follows:

- for a student program attempt to match a rate for an institution-defined value equivalent to on-campus attendance, all units must be on-campus
- for a student program attempt to match a rate for an institution-defined value equivalent to off-campus attendance, all units must be off-campus
- if neither of these conditions is met, a rate for a value equivalent to multi-modal attendance applies

The derived attendance type, in which the fee period is associated with only one load calendar in the Calendar windows, is determined as follows:

- for a student program attempt to match a rate for an institution-defined value equivalent to full-time, the sum of the Effective Full Time Student Units, or EFTSU, for each unit must be within the range specified by the institution as a full-time load for that load calendar in the Program Attendance Types window
- for a student program attempt to match a rate for an institution-defined value equivalent to part-time, the sum of the Effective Full Time Student Units, or EFTSU, for each unit must be within the range specified as a part-time load for that load calendar in the Program Attendance Types window

The derived attendance type, in which the fee period is associated with more than one load calendar in the Calendar windows, is determined as follows:

- for a student program attempt to match a rate for an institution-defined value equivalent to full-time, the sum of the Effective Full Time Student Units, or EFTSU, for each unit must be within the range specified as full-time for the academic period in the Program Attendance Types window
- for a student program attempt to match a rate for an institution-defined value equivalent to part-time, the sum of the Effective Full Time Student Units, or EFTSU, for each unit must be within the range specified as part-time for the academic period in the Program Attendance Types window

Multiple Program Attempt Fees

When a student is enrolled in more than one program, an assessment for an institution-wide fee must take into account all program attempts liable for the fee when determining the rate.

A rate with a location specified is matched against a nominated location of the major program attempt. The major program attempt is the one with the greatest sum of the unit Effective Full Time Student Units, or EFTSU, for the student or, if program attempts have equal EFTSU values, the program with the earliest commencement.

A rate with an attendance mode or attendance type specified is matched against a derived attendance type or mode of the major program attempt.

The derived attendance mode for each program is determined, as explained in Single Program Attempt Fees for fees with a Program trigger category, and then the following criteria are applied:

- if all programs are on-campus, the on-campus rate applies
- if all programs are off-campus, the off-campus rate applies
- if neither of these criteria is met, a rate for multi-modal attendance applies

The derived attendance type for each program is determined by summing the unit Effective Full Time Student Units, or EFTSU, for all program attempts and matching the sum to either the load calendar attendance type range or the academic period attendance type range.

Residency

Residency types are values for students who are residents or non-residents of the location of the institution which they are attending. Examples of residency types include residency in-state and out-of-state. Student System checks residency types created by the institution and maintained in the person's record. If there are values associated with the residency attribute, then the charge rate associated with the attribute is assessed, depending on the residency code found in the person's record.

Residency types appear as a list of values for any applicable fees on the Fee Assessment Rates window. Rates that correspond to each residency type will be entered in the Fee Assessment Rates window.

Class Standing

Institutions may assess fees based on the student's year in school, or class standing. For example, a freshman may be billed tuition at one rate and a sophomore may be billed tuition at a different rate.

Class standing is determined at the career level for a student. However, if a program is designated as the primary program, then the class standing used for rate calculation will be at the career level for the primary program.

If there is more than one career, then there will be more than one class standing. However, since there will be one primary program, and thus a primary career, rates that are dependent on class standing will be assessed using the class standing of the primary program.

Institution

Institution fees, fees that have a system fee trigger category of institution, are levied only once across all enrollments. This means that a single fee type assessment applies across a student's enrollment regardless of the number of courses enrolled and the fee category assigned to each of the courses.

All student course attempts are grouped and assessed together that meet the following criteria:

- fee type is a liability under fee category
- all fee categories are operational in the same fee calendar instance

If the charge methods are not Flatrate, then unit enrollments under all considered courses are grouped for the charge elements calculation. If the charge method is at Flatrate, then assessment is by element ranges.

Institution fees are independent of program attempts and fee categories assigned to each program attempt of the student. The fee type for Institution can be assessed using all charge methods. These charge methods can vary across the course attempt fee categories.

Fee Triggers and Fee Liabilities

A trigger is the name given to one or more programs, units, or groupings of programs and units, including unit sets, when they are associated with a fee liability, or a fee within a specific fee category. If fee assessment matches a particular student's program, unit set, and unit attempts to a trigger, the student in that fee category is assessed the corresponding fee.

Setting up triggers requires the following prerequisites:

- a trigger category must first be entered for each fee type in the Fee Types window
- triggers must be associated with fee liabilities by accessing one or more of the trigger windows

Trigger Categories

Trigger windows, accessed from the second window of the Fee Category Calendar Instance window, are used to select the appropriate trigger or triggers for a fee liability.

This section includes information on the following trigger categories:

- PROGRAM
- UNIT
- UNITSET
- COMPOSITE

PROGRAM

A fee liability can have Program triggers set in the following windows:

- Program Fee Trigger
- Program Group Fee Trigger
- Fee Types

The Program Fee Trigger window is used when only a single program, a single method of studying a program, or a small number of programs are associated with a fee. The other windows allow various sets of programs to be associated with a fee. These sets of programs are defined in the Program Structure and Planning subsystem using the Program Groups window for program groups, and the Program Types window for program types.

UNIT

The Unit Fee Trigger window is used to set up Unit triggers, associating a fee with an individual unit or units. Whether or not the system associates a fee with a unit or units depends on when and where the unit is studied.

UNITSET

The Unit Set Fee Trigger window is used to set up Unitset triggers, associating a fee with a particular unit set.

COMPOSITE

The Fee Trigger Group window is used to set up a Composite trigger, associating a fee with a trigger group, including a program, one or more unit sets, and one or more units. All components of the trigger group must match the student's enrollment for the Composite trigger to take effect.

A trigger group is entered in the Fee Trigger Group window. The number of the group is entered in the Program Fee Trigger window for programs, in the Unit Set Fee Trigger window for unit sets, and in the Unit Fee Trigger window for units.

A Composite trigger can be set up to take effect if any one of its components is present.

For example, a computer access fee liability is assigned a Composite trigger category and includes the following triggers:

- trigger group consisting of the Bachelor of Commerce program and computing units SCC111, SCC222, SCC333, and SCC555
- Bachelor of Computing program
- Multimedia Technology unit set, or major

Students are charged the fee if they study the Bachelor of Commerce program and all computing units SCC111, SC222, SCC333, and SCC555, the Bachelor of Computing program, or the Multimedia Technology unit set as part of any program.

Institution Fee Categories

The institution fee category has no triggers since fees in this category apply throughout the institution to any eligible student.

Ancillary Charges

Ancillary charges are charges that originate in offices outside of the student finance office but are unrelated students' tuition. Examples of ancillary charges include housing and dining expenses.

Fee types represent charges from ancillary operations. Each ancillary fee type must be associated with a fee calendar and must be part of the fee type calendar rollover functionality.

Charges assessed against the ancillary fee type are created through lookups and through a manual process which permits users to assess ancillary charges for an individual student.

Institutions have the ability to define the attributes of the ancillary charge. Institutions provide student attributes, and Student System applies this rate to the matching attributes imported for each student.

Prior to assessing the ancillary rate, institutions must determine if there are dependences among multiple rates, and if there are dependencies, institutions must determine how to enter these rates. For example, if a board charge is dependent on a room charge, then a rate table needs to accommodate both room and board attributes in each of the rates.

Note: Some institutions may provide students with assistantships. These assistantships are reflected as negative numbers in the rate table. Institutions issue a charge based on the student's attribute and then issue a separate transaction to show the credit.

Users create an active fee type that maps to a system fee type of Ancillary. Users then query this fee type in the Fee Types window. The result of this action is that the Ancillary Segment window is invoked. Users define ancillary segments for the fee type that maps to the system fee type of Ancillary for a particular fee type calendar instance.

To define ancillary rates for an ancillary segment, users must click Rates on the Fee Types window. The Ancillary Rates window appears and users can enter rates. To calculate the ancillary charges, users must run the Import and Calculation of Ancillary Charges concurrent process. If some ancillary attributes are not defined, users will get an error message. Users must then open the Ancillary Charges Error Resolution window. Users cannot delete a record from the Ancillary Charges window.

Fee Disbursement Rules

Rules for fee disbursement are unique to the fee type, calendar type, and fee disbursement formula number. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The fee disbursement rules determine whether a fee disbursement formula applies to a student or a program. Fee disbursement rules are viewed in the Fee Disbursement Formula Rules window.

The following table describes fee disbursement rule operators.

Table 18–21 Fee Disbursement Rule Operators

Syntax / Operator	Definition	Example	Result
=	equal to	Sex = Male	returns true if gender of student is male
< >	not equal to	Sex < > Male	returns true if gender of student is not male, that is, gender is female or unknown
()	parentheses	(Sex < > Male AND Sex < > Unknown)	returns true if sex is female, otherwise false
AND	logical and	(Sex < > Male AND Sex < > Unknown)	returns true if sex is female, otherwise false
OR	logical or	(Sex < > Male OR Sex < > Female)	returns true if sex is male, female, or unknown

The following table describes fee disbursement rule parameters.

Table 18–22 Fee Disbursement Rule Parameters

Parameter	Description	Current Value
Sex	returns gender of student	Male, Female, Unknown

18.6 Setting Up Fee Structures - Overall Procedure

Setting up fees includes the following procedures and subprocedures:

Setting Up Fee Structure Statuses IGSFI001

Setting Up Fee Types IGSFI012

1. Setting Up Fee Type Calendar Instances IGSFI012
 - a. Setting Up Fee Assessment Rates - Fee Type IGSFI021
 - b. Setting Up Fee Type Accounts IGSFI064
 - c. Setting Up Ancillary Segments IGSFI039
 - Setting Up Ancillary Rates IGSFI040
2. Setting Up Retention Schedules - Fee Type IGSFI024
3. Setting Up Element Ranges - Fee Type IGSFI020

Setting Up Fee Category Calendar Instance IGSFI019

1. Setting Up Retention Schedules - Fee Category IGSFI024
2. Setting Up Fee Category Fee Liabilities
 - a. Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
 - b. Setting Up Fee Triggers
 - Setting Up Program Group Fee Triggers IGSFI014
 - Setting Up Program Fee Trigger IGSFI015
 - Setting Up Program Type Fee Triggers IGSFI013
 - Setting Up Unit Fee Trigger IGSFI016
 - Setting Up Fee Trigger Group IGSFI018
 - Setting Up Program Fee Trigger - Composite IGSFI015
 - Setting Up Unit Fee Trigger - Composite IGSFI016
 - Setting Up Unit Set Fee Trigger - Composite IGSFI018
 - Setting Up Unit Set Fee Trigger IGSFI018
 - c. Setting Up Fee Assessment Rates - Fee Category IGSFI021
 - d. Setting Up Element Ranges - Fee Category IGSFI020

18.7 Setting Up Fee Structure Statuses IGSFI001

Use this procedure to match a fee structure status defined by the institution to a system-defined status.

Student finance data can vary in scope and can affect the following:

- a fee type in any category to which it belongs
- all fee types in a fee category
- a single fee type in a particular category

The different ranges for a particular fee apply within a specified fee period. They are represented by different levels.

Fee structure statuses reflect the active, inactive, or planned activity of a fee at each level. Statuses are entered in the Fee Types window for the first level and in the Fee Category Calendar Instance window for the second and third levels. The three levels are fee type calendar instance, fee category calendar instance, and fee category fee liability.

The system statuses for fee structure are active, inactive, and planned. Unless it is important to retain a term already in use in the institution, it is recommended that institution-defined status names reflect system status names.

You can change the status of any unused fee type calendar instance attribute to inactive or planned. You cannot delete these attributes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Fees > Fee Structure Statuses > Fee Structure Statuses window

Steps

Enter data in each field of the window as described in the Fee Structure Statuses window description table. Save your work.

Table 18–23 Fee Structure Statuses Window Description

Field Name	Type	Features	Description
Fee Structure Status	Required		Institution-defined status name to map to system fee structure statuses
Description	Required		Fee structure description
System Fee Structure Status	Required	Drop-down list	System fee structure values are Active, Inactive, or Planned
Closed	Optional	Check box	If selected, prevents a status from being used

18.8 Setting Up Fee Types IGSFI012

Prerequisites

Fee Structure Statuses IGSFI001

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Fees > Fee Types > Fee Types window

Steps

1. Enter data in each field of the window as described in the Fee Types window description table below.

Enter the fee type name and select the system fee type from the list. Next, select the system fee trigger category. The system fee trigger category determines if fees assessment is done at the institution, program, unit, composite or unit set level.

Note: Institution fees (fees that have a system fee trigger category of institution) are levied only once across all enrollments. This means that a single fee type assessment applies across a student’s enrollment regardless of the number of courses i.n which the student is enrolled and the fee category assigned to each of the courses.
2. Enter the description of the fee type created.
3. Save your work.

4. Perform the procedures below to complete setting up fee types:
 - a. Setting Up Fee Type Calendar Instances IGSFI012
 - Setting Up Fee Assessment Rates - Fee Type IGSFI021
 - Setting Up Fee Type Accounts IGSFI064
 - Setting Up Ancillary Segments IGSFI039
 - Setting Up Ancillary Rates IGSFI040
 - b. Setting Up Retention Schedules - Fee Type IGSFI024
 - c. Setting Up Element Ranges - Fee Type IGSFI020

Table 18–24 Fee Types Window Description

Field Name	Type	Features	Description
Fee Type	Required	List of values	Fee type
System Fee Type	Required	drop-down list	System fee type; must be assigned to each fee type
System Fee Trigger Category	Required	drop-down list	Restricts the type of fee triggers used to match a student program, unit, or unit set attempt to a fee for which students in a particular category are liable. Valid values are Program, Institution, Unit, Composite, and Unitset
Fee Class	Optional	List of values	Groups fee types under different classes.
Optional Payment	Optional	Check box	<p>If selected, indicates that a fee is not mandatory; no debt management applicable</p> <p>Note: If selected and the system fee type is Finance Charge, Late Charge, Sponsor, Aid Adjustment, Document or Refunds, an error message is displayed that the Optional Payment indicator cannot be set for this system fee type and users cannot save the record with the Optional payment indicator flag set.</p>
Closed	Optional	Check box	If selected, prevents an existing fee liability from being assigned as a new fee liability

Table 18–24 Fee Types Window Description

Field Name	Type	Features	Description
Description	Required		Fee type description
Comments	Optional		Fee type comments
Fee Type Calendars	Required	Button	Opens Fee Type Calendar Instances window

18.8.1 Setting Up Fee Type Calendar Instances IGSFI012

In the Student Finance subsystem, a fees administrator sets up fee types and fee categories independently, and then assigns fee types to the categories. One fee type can be included in many categories. Only fees assigned in this way are available for assessment. A single fee type within a fee category is known as a fee liability.

After a fee type is defined, it must be attached to a fee type calendar instance. A calendar instance contains the start and end date of an academic period. A fee type attached to a calendar instance is known as fee type calendar instance.

For example, an international science undergraduate might be in the fee category INTERNATNL. This category includes fees for tuition, health benefit levy and laboratory, and computer access fees. A local student with the fee category DOMESTIC may also be liable for general service and program related fees, but the category will not include a health benefit levy.

Responsibility

Oracle Student System Super User

Prerequisites

Fee Periods IGSCA002

Date Alias IGSCA006

Account Hierarchy IGSFI057

Calendar Relationships IGSCA004

Navigation

From previous procedure (Setting Up Fee Types IGSFI012): Click **Fee Type Calendars**.

From Navigator: Student Finance > Setup > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendars Instances window

Steps

1. In the Fee Type Calendar Instances window, select the fee calendar type and specify the status of the fee calendar type.
2. Enter the start and end date for fee assessment to begin. Also, enter the retro date to specify the date after which fee assessment cannot take place.
3. Select the appropriate charge method for fee assessment.
4. Select the rule sequence number, and select the account hierarchy.

Note: Fees administrators can specify an Initial Default Amount to be assessed every time the fee assessment concurrent process is run. For this to happen, the Initial Processing mode parameter for fee assessment concurrent process must be set to Initial mode with Default mode.

5. Save your work. Click **Back**.

18.8.1.1 Setting Up Fee Assessment Rates - Fee Type IGSFI021

Rates shown in the Fee Assessment Rates window are used by the Process Fee Assessment Landscape and Process Fee Assessment From To Do Entries concurrent processes.

The enrollment attributes as determined by the Fee Assessment process are compared with the rates attributed to determine the rate value to be used for assessment. In determining applicable charge rates, program attributes in the Fee Assessment Rates window are matched to nominated student program attempt attributes in cases in which the assessment is predictive and the student is not currently enrolled for the fee calendar instance concerned or the derived student program attempt attributes for enrolled students.

The fee type calendar instance associated with the system fee type Document has an account hierarchy defined only with the fee type entity. If there is a change in org unit when fee assess is rerun, it reverses the original transaction and creates a fresh transaction with the new changed organization unit, even if there is no change in the final assessment amount.

Levels

Assessment rate data can be attached at the FTCL level, with the rates for a fee applying regardless of category, or at the FCFL level, with the rate or rates applying to the fee only within the category selected. Fees with a system fee trigger category of Institution must be specified only at the FTCL level because these fees are levied once across all the program attempts of students at the institution, regardless of their fee category.

Other than fees with a system fee trigger category of INSTITUTION, rates can exist at either level but not at both levels for the same fee type.

Level Access

The Fee Assessment Rates window is accessed at the following levels:

- FTCL level by the Assessment Rates button in the Fee Type Calendar Instances window
- FCFL level by the Fee Calculations button and then Fee Type Calendar Instance Assessment Rate button in the Fee Category Fee Liability window. The Fee Assessment Rates window can be accessed from the FCFL level, but only to display the existing data.

Multiple Rates

Within a level, multiple charge rates can be set up for a single fee, depending on various enrollment attributes such as location, attendance type, attendance mode. For example, the rate of a general service fee may depend on the location where a student is studying. When setting up these attributes, the circumstances of all students due to pay the fee must be covered.

Prerequisites

Fee Periods IGSCA002

Location Code IGSOR010

Attendance Type IGSPS006

Attendance Mode IGSPS005

Class Standing IGSPR015

Program IGSPS013

Organization IGSOR013

Residency Status IGSPE007

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Assessment Rates**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendars Instance window > Assessment Rates button > Fee Assessment Rates window

Steps

1. Enter data in each field of the window as described in the table.
2. Save your work.
3. Click **Back**.

Table 18–25 Fee Assessment Rates Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Fee Category	Default, display only		Fee category
Currency	Default, display only		Currency is displayed if available in the Fee Assessment Rates window Note: If not displayed, local currency applies to any rate entered and can be found in the International Currency Codes window.
Charge Method	Default, display only		Charge method associated with fee assessment rate
Fee Assessment Rate Region			
Included deleted rates	Optional	Check box	If selected, displays deleted rates Note: If rates are deleted, any dependent element range rates are also logically deleted. A deletion date is supplied by the system
Rate Number	Display only		Fee assessment rate number
Charge Rate	Required		Fee assessment charge rate

Table 18–25 Fee Assessment Rates Window Description

Field Name	Type	Features	Description
Order of Precedence	Optional		Fee assessment precedence number Note: Fees can have rates that vary according to changes in the attributes location code, attendance type, and attendance mode. When any of these attributes are used to define a rate, and these attributes are not mutually exclusive, an order of precedence must be specified. For example, a rate with the precedence number 1 is used in preference to one with the precedence number 2, in cases for which both might apply
Location Code	Optional	List of values	List of location codes
Attendance Type	Optional	List of values	List of attendance types Note: Attendance Type is specified in Program Structure Planning subsystem in the Program Attendance Types window
Attendance Mode	Optional	List of values	List of attendance modes Note: Attendance Mode is specified in Program Structure Planning subsystem in the Program Attendance Modes window
Class Standing	Optional	List of values	List of class standings
Program	Optional	List of values	List of programs
Organizational Unit Code	Optional	List of values	List of organization unit codes
Residency Status			List of residency statuses
Location	Default, display only		Fee assessment rate location
Program	Default, display only		Fee assessment rate program
Attendance Type	Default, display only		Fee assessment rate attendance type
Organizational Unit	Default, display only		Fee assessment rate organization unit code

Table 18–25 Fee Assessment Rates Window Description

Field Name	Type	Features	Description
Attendance Mode	Default, display only		List of attendance modes
Residency Status	Default, display only		Fee assessment rate residency status
Class Standing	Default, display only		Fee assessment rate class standing
Back		Button	Returns to Fee Category Fee Liability window

18.8.1.2 Setting Up Fee Type Accounts IGSFI064

Note: This is required if defining revenue account segments, retention accounts and receivable accounts at the fee type level. Applicable to all System Fee Types.

Prerequisites

If using Oracle General Ledger, Accounting Flexfield structure

If using non-Oracle General Ledger, Accounting structure

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Accounts**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendar Instances window > Accounts button > Fee Type Accounts window

Steps

1. Enter data in each field of the window as described in the table.

2. Save your work and close the window.

Table 18–26 Fee Type Accounts Window Description

Field Name	Type	Features	Description
Fee Type	Default, display only		Fee type
Description	Default, display only		Fee type description
Fee Calendar	Default, display only		Fee calendar
Effective Dates	Default, display only		Fee calendar effective start and end dates
Segments and Accounts Region, Revenue Segments Tab			
Revenue Segments Tab			
Segment	Required		Revenue account segment name
Revenue Account	Optional	List of values	Revenue account segment value
Accounts Tab			
Receivables	Required		Receivables account key flexfield
Retention	Optional		Retention revenue account Note: The revenue account used for retention is different from the normal revenue account and is defined separately in the Fee type Accounts window. This can be a GL Account Flexfield or an Account Code defined in the Fee Posting Accounts window.
Receivables	Required	List of values	Receivables account code
Revenue	Required	List of values	Revenue account code
Retention	Optional		Retention revenue account

18.8.1.3 Setting Up Ancillary Segments IGSFI039

The ancillary segments procedure enables users to set up ancillary segments for a fee type calendar instance. This is only applicable for System Fee Type Ancillary.

The Ancillary Segments window displays the calendar type, effective dates, and fee type.

In the Ancillary Segments region, users can enter ancillary segments and enable the segments. The segments are then enabled in the Ancillary Rates window. Users can also view the ancillary rates by clicking the Rates button.

Prerequisites

Fee Calendars IGSCA002

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Ancillary Rates**.

Note: The button is active only for ancillary rate types.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendar Instances window > Ancillary Rates button > Ancillary Segments window

Steps

1. Enter data in each field as described in the table.
2. Save your work.

Table 18–27 Ancillary Segments Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Ancillary Segments Region			

Table 18–27 Ancillary Segments Window Description

Field Name	Type	Features	Description
Segments	Required		Ancillary segment
Enabled	Optional	Check box	If selected, is enabled in the Ancillary Rates window
Rates		Button	Opens the Ancillary Rates window

18.8.1.3.1 Setting Up Ancillary Rates IGSFI040 The ancillary rates procedure enables users to set up rates for different combinations of ancillary segments. An ancillary segment is used to define the rates for a combination of ancillary attributes.

Users can use the ancillary rates to calculate the ancillary charges of a particular student. Examples of ancillary charges include dining, housing and so on.

In the Rates region of the Ancillary Rates window, users can enter rates for ancillary segments. The ancillary segments that users have set up in the Ancillary Segments window, such as housing type and dining, are displayed.

Prerequisites

Fee Calendars IGSCA002

Navigation

From previous procedure (Setting Up Ancillary Segments IGSFI039): Click **Rates**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendars Instances window > Ancillary Rates button > Ancillary Segments window > Rates button > Ancillary Rates window

Steps

1. Enter data in each field of the Ancillary Rates window (IGSFI040) as described in the table.
2. Save your work.

3. Close the Ancillary Segments window

Table 18–28 Ancillary Rates Window Description

Field Name	Type	Features	Description
Calendar Type	Default display only		Calendar type
Effective Dates	Default display only		Effective start and end dates
Fee Type	Default display only		Fee type
Rates Region			
Housing	Required		Ancillary segments for which rates are entered. Note: Ancillary segments that users have set up in the Ancillary Segments window, such as housing type and dining, are displayed.
Enabled		Check box	Is selected if the combination of segments are enabled in the Ancillary Segments window
Rate	Required		Rate amount Note: The ancillary rate amount cannot be negative.

18.8.1.4 Setting Up Retention Schedules - Fee Type IGSFI024

The retention schedules procedure enables users to specify the date after which the institution retains a specified portion of an assessed fee.

A retention schedule is designed to operate in circumstances when, prior to a teaching period census, a student's liability for a fee reduces. This can happen if the student withdraws from one or more units or discontinues program enrollment altogether.

Entries in the Retention Schedule window define a portion of the fee liability that is to be retained after reassessment even though students have reduced their enrollment load.

Retention can be specified as a percentage of a prior liability or as a fixed amount that applies equally to paid and unpaid student fee liabilities. If a student's liability is reduced after payment is made, any refund due equals the balance after retained amounts have been subtracted. For unpaid amounts, debt recovery applies to the amount retained.

If the unit discontinuation criteria is correctly established, retention schedules do not operate if a student discontinues or reduces enrollment after the teaching period census. When a student withdraws after the census, the load has already been incurred and any assessed fees typically remain due for payment.

The Fee Calendar Instances region identifies the fee period and level for which the schedule is relevant. For a schedule at the FTCL level, the fee category is blank. At the FCCI level, the Fee Type field is blank. At the FCFL level, there are entries in both the Fee Type and the Fee Category fields.

Warnings advising that exceptions exist at another level are shown at the FCCI level if, for any fee in the category, a schedule exists, at any other level, that overrides the FCCI schedule for that fee or institution fee is included in the category.

Schedule Entries

One or more records are entered in a retention schedule. Each entry represents a particular date, after which the corresponding retention conditions apply. Generally, the amount or percentage retained increases as the fee period progresses. The effective date of the Process Fee Assessment concurrent process is compared to the dates in the schedule, to decide which entry is applicable to reassess a student's liability.

Levels and Overrides

Though retention schedules can be specified at three levels, it can be concurrently run at two levels. The combinations are:

- FTCL level and FCCI level concurrently, in which case the schedule at the FTCL level overrides that at the FCCI level for the corresponding fee only
- FCCI level and FCFL level concurrently, in which case the schedule at the FCFL level overrides that at the FCCI level for the corresponding fee only

In both of the preceding cases, fees without schedules at the FTCL or FCFL level have retention applied according to the category schedule at the FCCI level, even if they are in a group with other fees for which an override applies. However, note the important exception described in the Institution Fees section.

If a fee is not covered by a schedule at any level, retention does not apply.

Institution Fees

Fees with a system fee trigger category of type Institution can have retention schedules defined only at the FTCL level.

WARNING: For institution fees, the fee assessment routine takes no account of schedules at any other level. Lack of a schedule at the FTCI level means that no schedule exists, and therefore that no retention applies. This is so, even in cases in which a category that includes the corresponding fees as liabilities has a schedule attached.

Level Access

The Fee Retention Schedules window is accessed as follows:

- FTCI level by the Retention Schedule button in the Fee Type Calendar Instances window
- FCCI level by the Fee Retention Schedule button in the Fee Category Calendar Instances window
- FCFL level by the Fee Retention Schedule button or the Fee Type Calendar Instance Retention Schedule button in the Fee Category Fee Liability window

The Fee Type Calendar Instance Retention Schedule button is displayed when a schedule exists at the FTCI level. The window can still be accessed from the FCFL level, but only to display the existing FTCI schedule.

Example 1

A university applies a fee retention and refund policy to tuition fees:

Semester 1

- Discontinuation up to and including 31-DEC of the preceding year:
Nil retention. 100% refund of fees paid.
- Discontinuation between 01-JAN and up to the start of teaching:
50% retention of assessed fees. All monies in excess of 50% refunded.
- Discontinuation between the start of teaching and the teaching period census:
80% retention of assessed fees. All monies in excess of 80% refunded.
- Discontinuation after the teaching period census:
No refund applicable

This policy can be defined in a retention schedule as follows:

First entry: Date alias instance = 01-JAN-99, Retention% = 50.00, Retention Amount = no entry

Second entry: Date alias instance = 01-MAR-99, Retention% = 80.00, Retention Amount = no entry

Example 2

First entry: Date alias instance = 01-FEB-99, Retention% = no entry, Retention Amount = 50.00

Second entry: Date alias instance = 01-MAR-99, Retention% = no entry, Retention Amount = 75.00

Third entry: Date alias instance = 25-MAR-99, Retention% = 100, Retention Amount = no entry

With an effective assessment date of 15-FEB-99, the first entry applies. If an assessed fee liability is reduced at that time from \$120 to \$10, then the fee assessment is reduced to \$10, an additional debt of \$40 is retained, and the student is liable for \$50 in total.

With an effective assessment date of 27-MAR-99, the third entry applies. If an assessed fee liability is reduced at that time from \$120 to \$90, then the fee assessment is entered as \$90, an additional debt of \$30 is retained, and the student is liable for \$120 in total or 100% of the original assessment.

Prerequisites

Date Aliases IGSCA006

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012): Click **Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendar Instances window > Retention Schedule button > Retention Schedules window

Steps

1. Enter data in each field of the Retention Schedules (Fee Type Level) window as described in the table.
2. Save your work.

3. Click Back.

Table 18–29 Retention Schedules Window Description

Field Name	Type	Features	Description
Calendar Type	Default display only		Calendar type and description
Effective Dates	Default display only	List of values	Effective start and end dates
Fee Type	Default display only		Fee type
Fee Category	Default display only	Drop down list	Fee category Note: Schedules for fees with a system fee trigger category of Institutn must be specified at the FTCTI level.
Currency	Default display only		Currency type
Fee Retention Schedules Region			
Date Alias	Required	Calendar	Displays date aliases available in the fee period Note: A date alias can be used more than once, as long as a different instance is selected.
Date Value		Calendar	Date value
Retention%	Optional		A proportion of a previous assessment Note: The assessed liability to which percentage retention applies can differ depending on the student's pattern of enrollment and withdrawal in units before the census date. In cases where a student progressively discontinues units, retention applies to the assessment immediately prior to the date of the first retention schedule entry. In cases where a student's enrollment fluctuates, retention applies on the highest assessment made whether immediately prior to, or during, the period when retention operates.

Table 18–29 Retention Schedules Window Description

Field Name	Type	Features	Description
Retention Amount	Optional		Amount to be retained if fixed amount Note: Amounts not retained are available for refund.
Effective Dates	Required	Calendar	Effective start and end dates Note: Start date is the date alias instance for the entry. Start date and end date for each entry indicates the inclusive period during which the entry applies. Note: End date is the day before the start of the next entry. It can be the end date of the fee period.
Back		Button	Returns to Fee Type Calendar Instances window

18.8.1.5 Setting Up Element Ranges - Fee Type IGSFI020

The element ranges procedure enables users to create element ranges for a fee type within which specific charge rates apply.

For fee types with a charge method of Eftsu, Credit Point, or Charge Per Unit, rates entered in the Fee Assessment Rates window can be assigned to element ranges entered in the Element Ranges window. For example, if the charge method is Charge Per Unit, a range of 9.000 to 12.000 can be set up, with a rate applied specifically to eligible students whose total calculated load for the relevant fee period falls within that range.

An important feature of the Element Ranges window is the ability to override the standard charge method for the fee by setting a Flatrate charge method for one or more ranges. In this case, all eligible students with a load falling within the range are charged the same amount for the fee.

Users cannot access the Element Ranges window if the existing charge method for the fee is Flatrate.

Levels

For a particular fee, element ranges are specified at the FTCL level if the ranges operate for the selected fee regardless of category, or at the FCFL level if the ranges apply only to the fee within the category selected. They cannot be specified at both levels for the same fee type. Fees with a trigger category of Institutn can have element ranges entered only at the FTCL level.

The window is accessed at the following levels:

- FTCI level using the Element Ranges button in the Fee Type Calendar Instances window
- FCFL level using the Fee Calculations button and the Element Ranges button, or the Fee Type Calendar Instance Elements Range button, in the Fee Category Fee Liability window

Note: The Fee Type Calendar Instance Elements Range button on the Fee Category Fee Liability window is displayed when ranges are already entered at the FTCI level. The window can still be accessed from the FCFL level, but only to display the existing data.

Recording Range Rates

For each range specified in the Elements Range region, a rate or rates from those already entered in the Fee Assessment Rates window can be assigned in the Elements Range Rate region. An element range rate record is created when a rate is assigned to an element range.

Example 1

The institution offers international students studying full-time a tuition fee of \$5,000 per semester. However, this arrangement applies only if students study three or four units per semester. If they drop below this load, or take more than four units, a fee of \$1,700 per unit is used.

To implement this in a one-semester fee period for Tuition fee type in the Internatnl category with a Perunit charge method, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$1,700 and Rate Number 2 for \$5,000.
- In the Element Ranges window, define three range entries.

Define the following range entries:

- Lower Range value = no entry; Upper Range value = 2; Rate Number 1
- Lower Range value = 3; Upper Range value = 4; FLATRATE Override Charge Method Type; Rate Number 2
- Lower Range value = 5; Upper Range value = no entry; Rate Number 1

The fee assessment calculation is as follows:

- Student with a load of 1 unit: 1 times 1700 = \$1,700

- Student with a load of 2 units: 2 times 1700 = \$3,400
- Student with a load of 3 or 4 units: 1 times 5000 = \$5,000 that is the flat rate for this element range
- Student with a load of 5 units: 5 times 1700 = \$8,500

Example 2

A discount on a computer access fee is applied to students in computer science programs if their credit point load is over a certain value.

To implement a discount in a one-semester fee period for a COMP-ACC fee type with a CRPOINT charge method and triggered by computer science programs, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$10 and Rate Number 2 for \$8.
- In the Element Ranges window, assign Rate Number 1 to a range with a Lower Range value of 1 and an Upper Range value of 9. Assign Rate Number 2 to a range with a Lower Range value of 10 and an Upper Range value of 12.

The fee assessment calculation is as follows:

- Student with a load of 3 credit points: 3 times 10 = \$30
- Student with a load of 4 credit points: 4 times 10 = \$40
- Student with a load of 9 credit points: 9 times 10 = \$90
- Student with a load of 10 credit points: 10 times 8 = \$80
- Student with a load of 11 credit points: 11 times 8 = \$88
- Student with a load of 12 credit points: 12 times 8 = \$96

Prerequisites

Assessment Rates IGSFI021

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Element Ranges**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types window > Fee Type Calendars button > Fee Type Calendar Instances window > Element Ranges button > Element Ranges window

Steps

1. Enter data in each field of the Element Ranges (Fee Type Level) window as described in the table.
2. Save Your work. Click **Back** to return to the Fee Type Calendar Instances window.
3. Click **Back** to return to the Fee Types window.
4. Create additional fee types or close the window.

Table 18–30 *Element Ranges Window Description*

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee calendar type
Fee Category	Default, display only		Fee calendar category
Currency	Default, display only		Fee calendar currency
Charge Method	Default, display only		Fee calendar charge method
Elements Range Region			
[Data Coordination Check Box]	Optional	Check box	If selected, data in Element Ranges window is automatically refreshed and coordinated with data in the Fee Type Calendar Instances window; if deselected data in Element Ranges window is refreshed only when the user clicks in Elements Range region. Leave deselected to speed up performance when querying records.
Include deleted ranges	optional	Check box	If selected, indicates that deleted ranges are included

Table 18–30 Element Ranges Window Description

Field Name	Type	Features	Description
Range Number	Default, display only		System-assigned range number
Lower Range	Required		Element range beginning
Upper Range	optional		Element range end
Override Charge Method Type	optional	List of values	Charge method type to be overridden
Deletion Date	Default, display only		Element range deletion date
Elements Range Rate Region			
Include deleted rates	optional	Check box	If selected, indicates that deleted element range rates are included
Rate Number	Required	List of values	Elements range rate number
Charge Rate	Default, display only		Fee assessment charge rate
Location Code	Default, display only		Fee assessment location code
Attendance Type	Default, display only		Fee assessment attendance type
Attendance Mode	Default, display only		Fee assessment attendance mode
Class Standing	Default, display only		Fee assessment class standing
Program	Default, display only		Fee assessment program
Org Unit Code	Default, display only		Fee assessment organization unit code
Residency Status	Default, display only		Fee assessment residency status
Creation Date	optional	Calendar	Element range creation date
Deletion Date	optional	Calendar	Element range deletion date
Back		Button	Returns to Fee Type Calendar Instances window

18.9 Setting Up Fee Category Calendar Instance IGSFI019

Fee categories are set up in the Fee Category Calendar Instance window.

Like a fee type, a fee category must be associated with a fee period and assigned a set of dates. A fee category can only operate in the fee period and with the dates associated with it.

At a minimum, users should establish the following set of fee categories:

- a postgraduate and an undergraduate fee category for international students, such as Intrntl-Pg and Intrntl-Ug
- a postgraduate and an undergraduate fee category for domestic students, such as Domestc-Pg and Domestc-Ug

Schedule data is typically associated with fee categories through schedule windows, accessed from the Fee Category Calendar Instance window. The schedules are intended to apply to all fees in a fee category and operate at the Fee Category, or FCCI, level.

Note: Overrides can apply for some fees in a fee category.

A fee category groups the fee that is applicable on a program attempt, and hence is attached to a program attempt when it is created. A program attempt has only one fee category. The fee assessment process assesses the fee, based upon the fee types included in this fee category.

Users can allow change in the fee category of a person program attempt even after the fee has been assessed for it. The fee category of a program attempt is derived based on the Fee Calendar Instance for which the fee assessment is being done.

The attached fee category to all program attempts cannot be changed if prior assessment for a student is being done. To perform a successful run in prior assessment mode, the fee category definition in the prior fee calendar instance and current calendar instance should be the same. Even the fee type attached to the fee category should be same and also have the same definitions.

The fee category calendar instance procedure enables users to create fee categories and link them to relevant calendar instances and date aliases.

In the Fee Category Calendar Instance window, users can assign fee calendars to categories. Users must enter appropriate active or planned fee calendar instances for each fee category, together with their relevant date alias instances. They are selected from instances already created in the Calendar subsystem.

If the assessment for a fee calendar instance is being done for the first time, the latest fee category attached to the program attempt is considered. If a previous assessment is present for this fee calendar instance, then the fee category to be used is the one used for the previous assessment. If there is a change in any of a person's program attempts, the prior assessment for that person is not possible.

Prerequisites

Fee Periods IGSCA002

Date Alias IGSCA006

Account Hierarchy IGSFI057

Calendar Relationships IGSCA004

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window

Steps

1. Enter data in each field of the Fee Category Calendar Instance Window as described in the table. Save your work.
2. Perform the following procedures to complete fee category calendar instance setup:
 - a. Setting Up Retention Schedules - Fee Category IGSFI024
 - b. Setting Up Fee Category Fee Liabilities
 - Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
 - Setting Up Fee Triggers
 - Setting Up Program Group Fee Triggers IGSFI014
 - Setting Up Program Fee Trigger IGFSI015
 - Setting Up Program Type Fee Triggers IGSFI013
 - Setting Up Unit Fee Trigger IGSFI016
 - Setting Up Fee Trigger Group IGSFI018
 - Setting Up Program Fee Trigger - Composite IGSFI015

- Setting Up Unit Fee Trigger - Composite IGFSFI016
- Setting Up Unit Set Fee Trigger - Composite IGFSFI018
- Setting Up Unit Set Fee Trigger IGFSFI018
- Setting Up Fee Assessment Rates - Fee Category IGFSFI021
- Setting Up Element Ranges - Fee Category IGFSFI020

Table 18–31 Fee Category Calendar Instance Window Description

Field Name	Type	Features	Description
Fee Category	Required		Fee category name
Description	Required		Fee category description
Closed	Optional	Check box	If selected, indicates that fee category is no longer valid Note: You cannot delete fee categories.
Currency	Default display only		The Currency Field is disabled and defaulted with the functional currency set up in the System Options window. This field is updateable for customers who have created any fee category with any other than the local currency.
Fee Category Calendar Instances Region			
Calendar Type	Required	Calendar	Fee category calendar type
Description	Default display only		Fee category calendar type description
Start Date	Default display only		Fee category calendar start date
End Date	Default display only		Fee category calendar end date
Status	Required	List of values	Status of fee category and calendar instance combination, as distinct from the status of calendar instance. Values are Active, Inactive, Planned. Note: A fee category and calendar instance status cannot be changed from Active to Inactive if a fee liability is Active in the category.

Table 18–31 Fee Category Calendar Instance Window Description

Field Name	Type	Features	Description
Start Date Alias	Required	Calendar	Calendar type start date and description
End Date Alias	Required	Calendar	Calendar type end date and description
Retroactive Date Alias	Optional	Calendar	Calendar type retroactive date and description

18.9.1 Setting Up Retention Schedules - Fee Category IGSFI024

The retention schedules procedure enables users to specify the date after which the institution retains a specified portion of an assessed fee.

A retention schedule is designed to operate in circumstances when, prior to a teaching period census, a student’s liability for a fee reduces. This can happen if the student withdraws from one or more units or discontinues program enrollment altogether.

Entries in the Retention Schedule window define a portion of the fee liability that is to be retained after reassessment even though students have reduced their enrollment load.

Retention can be specified as a percentage of a prior liability or as a fixed amount that applies equally to paid and unpaid student fee liabilities. If a student’s liability is reduced after payment is made, any refund due equals the balance after retained amounts have been subtracted. For unpaid amounts, debt recovery applies to the amount retained.

If the unit discontinuation criteria is correctly established, retention schedules do not operate if a student discontinues or reduces enrollment after the teaching period census. When a student withdraws after the census, the load has already been incurred and any assessed fees typically remain due for payment.

The Fee Calendar Instances region identifies the fee period and level for which the schedule is relevant. For a schedule at the FTCL level, the fee category is blank. At the FCCI level, the Fee Type field is blank. At the FCFL level, there are entries in both the Fee Type and the Fee Category fields.

Warnings advising that exceptions exist at another level are shown at the FCCI level if, for any fee in the category, a schedule exists, at any other level, that overrides the FCCI schedule for that fee or institution fee is included in the category.

Schedule Entries

One or more records are entered in a retention schedule. Each entry represents a particular date, after which the corresponding retention conditions apply. Generally, the amount or percentage retained increases as the fee period progresses. The effective date of the Process Fee Assessment concurrent process is compared to the dates in the schedule, to decide which entry is applicable to reassess a student's liability.

Levels and Overrides

Though retention schedules can be specified at three levels, it can be concurrently run at two levels. The combinations are:

- FTCI level and FCCI level concurrently, in which case the schedule at the FTCI level overrides that at the FCCI level for the corresponding fee only
- FCCI level and FCFL level concurrently, in which case the schedule at the FCFL level overrides that at the FCCI level for the corresponding fee only

In both of the preceding cases, fees without schedules at the FTCI or FCFL level have retention applied according to the category schedule at the FCCI level, even if they are in a group with other fees for which an override applies. However, note the important exception described in the Institution Fees section.

If a fee is not covered by a schedule at any level, retention does not apply.

Institution Fees

Fees with a system fee trigger category of type INSTITUTION can have retention schedules defined only at the FTCI level.

WARNING: For institution fees, the fee assessment routine takes no account of schedules at any other level. Lack of a schedule at the FTCI level means that no schedule exists, and therefore that no retention applies. This is so, even in cases in which a category that includes the corresponding fees as liabilities has a schedule attached.

Level Access

The Fee Retention Schedules window is accessed as follows:

- FTCI level by the Retention Schedule button in the Fee Type Calendar Instances window
- FCCI level by the Fee Retention Schedule button in the Fee Category Calendar Instances window

- FCFL level by the Fee Retention Schedule button or the Fee Type Calendar Instance Retention Schedule button in the Fee Category Fee Liability window

The Fee Type Calendar Instance Retention Schedule button is displayed when a schedule exists at the FTCL level. The window can still be accessed from the FCFL level, but only to display the existing FTCL schedule.

Example 1

A university applies a fee retention and refund policy to tuition fees:

Semester 1

- Discontinuation up to and including 31-DEC of the preceding year:
Nil retention. 100% refund of fees paid.
- Discontinuation between 01-JAN and up to the start of teaching:
50% retention of assessed fees. All monies in excess of 50% refunded.
- Discontinuation between the start of teaching and the teaching period census:
80% retention of assessed fees. All monies in excess of 80% refunded.
- Discontinuation after the teaching period census:
No refund applicable

This policy can be defined in a retention schedule as follows:

First entry: Date alias instance = 01-JAN-99, Retention% = 50.00, Retention Amount = no entry

Second entry: Date alias instance = 01-MAR-99, Retention% = 80.00, Retention Amount = no entry

Example 2

First entry: Date alias instance = 01-FEB-99, Retention% = no entry, Retention Amount = 50.00

Second entry: Date alias instance = 01-MAR-99, Retention% = no entry, Retention Amount = 75.00

Third entry: Date alias instance = 25-MAR-99, Retention% = 100, Retention Amount = no entry

With an effective assessment date of 15-FEB-99, the first entry applies. If an assessed fee liability is reduced at that time from \$120 to \$10, then the fee assessment is reduced to \$10, an additional debt of \$40 is retained, and the student is liable for \$50 in total.

With an effective assessment date of 27-MAR-99, the third entry applies. If an assessed fee liability is reduced at that time from \$120 to \$90, then the fee

assessment is entered as \$90, an additional debt of \$30 is retained, and the student is liable for \$120 in total or 100% of the original assessment.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Category Calendar Instances IGSFI019): Click **Fee Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance Window > Fee Retention Schedule button > Retention Schedule window

Steps

1. Enter data in each field of the Retention Schedules (Fee Category Level) window as described in "Setting Up Retention Schedules - Fee Type IGSFI024" in the Retention Schedules window description table.
2. Save your work. Click **Back**.

18.9.2 Setting Up Fee Category Fee Liabilities

The Fee Category Fee Liability window is used to assign fees to fee categories. Fees can only be included in fee categories with the same fee period. Once a fee is assigned to a fee category, it becomes a fee liability.

Calculation and schedule data can be set up for a fee liability. The data operates at the Fee Liability, or FCFL, level, and applies to the fee only when it is assigned to a specific fee category.

Although calculation data should typically be set up to operate at the Fee Type level and schedule data to operate at the Fee Category level, setting up calculation and schedule data to operate at the Fee Liability level allows a single fee to be assessed for one category of student only.

Note: Whatever level calculation and schedule data is set to, students can only be assessed a fee pertaining to their category.

Some fees are charged for a certain program, unit set, or unit. The windows to associate programs, unit sets, or units with fees are accessed through the Fee Category Calendar Instance window.

Note: Attributes of the fee category fee liability can be made inactive or planned if no longer in use. You cannot delete these attributes.

Prerequisites

Fee Structure Statuses IGSFI001

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window

Steps

1. Enter data in each field of the Fee Category Fee Liability window as described in the table.
2. Perform the following as necessary:
 - a. Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
 - b. Setting Up Fee Triggers
 - Setting Up Program Group Fee Triggers IGSFI014
 - Setting Up Program Fee Trigger IGFSI015
 - Setting Up Program Type Fee Triggers IGSFI013
 - Setting Up Unit Fee Trigger IGSFI016
 - Setting Up Fee Trigger Group IGSFI018
 - Setting Up Program Fee Trigger - Composite IGSFI015
 - Setting Up Unit Fee Trigger - Composite IGFSFI016
 - Setting Up Unit Set Fee Trigger - Composite IGSFI018
 - Setting Up Unit Set Fee Trigger IGSFI018

c. Setting Up Fee Assessment Rates - Fee Type IGSFI021

3. Save your work. Click **Back**.**Table 18–32 Fee Category Fee Liability Window Description**

Field Name	Type	Features	Description
Calendar Type	Default, display only		Fee type entered in Fee Types window
Effective Dates	Default, display only		Calendar type effective dates
Fee Category	Default, display only		Calendar type fee category
Currency	Default, display only		Calendar type currency
Status	Default, display only		Calendar type status
Fee Category Fee Liability Region			
Fee Type	Required	List of values	Fee type associated with calendar type
System Fee Type	Default, display only		System fee type associated with fee type
Fee Trigger Type	Default, display only		Fee trigger type associated with fee type;
Fee Liability Status	Default, display only	List of values	Status of fee type; statuses are Active, Inactive, Planned
Description	Default, display only		Description of fee type
Start Date Alias	Default, display only	List of values	Start date assigned to fee type
Charge Method Type	Default, display only		Charge method type associated with fee type

Table 18–32 Fee Category Fee Liability Window Description

Field Name	Type	Features	Description
Rule	Default, display only		Number of charge method rule
Syntax Tab	Default, display only		Displays formula for fee type
Description Tab	Default, display only		Describes fee type

18.9.2.1 Setting Up Retention Schedule - Fee Category Fee Liability IGFSI024

This is required if defining retention schedules at the Fee Category Fee Liability level.

Prerequisites

Date Aliases IGSCA006

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up Fee Category Fee Liability IGFSI019): Click **Fee Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Retention Schedule button > Retention Schedules (Fee Category Fee Liability Level) window

Steps

1. Enter data in each field of Retention Schedules (Fee Category Fee Liability Level) window as described in "Setting Up Retention Schedules - Fee Type IGFSI024" in the Retention Schedules window table.
2. Save your work. Click **Back**.

18.9.2.2 Setting Up Fee Triggers

The setup for fee liability fee triggers varies depending on the fee trigger type set for the specified fee type for the fee category calendar instance. There are four fee trigger types: program, unit, composite, and unit set.

If fee trigger type = program, then the following three buttons are exposed.

- Program Group Fee Triggers (displays IGSFI014)
- Program Fee Triggers (displays IGSFI015)
- Program Type Fee Triggers (displays IGSFI013)

If fee trigger type = unit, then the Unit Fee Trigger window opens.

If fee trigger type = composite, then the following four buttons are exposed.

- Fee Trigger Groups (displays IGSFI017)
- Program Fee Triggers (displays IGSFI015)
- Unit Fee Triggers (displays IGSFI016)
- Unit Set Fee Triggers (displays IGSFI018)

If fee trigger type = unit Set, then the Unit Set Fee Trigger window (IGSFI018) opens.

The setup for fee triggers is described in the following sections:

Program Fee Trigger Type

- Setting Up Program Group Fee Triggers IGSFI014
- Setting Up Program Fee Trigger IGSFI015
- Setting Up Program Type Fee Triggers IGSFI013

Unit Fee Trigger Type

- Setting Up Unit Fee Trigger IGSFI016

Composite Fee Trigger Type

- Setting Up Fee Trigger Group IGSFI018
- Setting Up Program Fee Trigger - Composite IGSFI015
- Setting Up Unit Fee Trigger - Composite IGSFI016
- Setting Up Unit Set Fee Trigger - Composite IGSFI018

Unit Set Fee Trigger Type

- Setting Up Unit Set Fee Trigger IGSFI018

18.9.2.2.1 Setting Up Program Group Fee Triggers IGSFI014 The program group fee trigger procedure creates a link between a fee liability and the set of programs constituting a program group so that only students in the specified programs are considered for the fee liability.

In the Process Fee Assessment concurrent process, triggers are used to decide whether a fee applies to a particular program a student is studying. If a program trigger entered against a fee liability matches a student program attempt, the student is eligible for assessment.

The Program Group Fee Trigger window matches program groups to fee liabilities. The programs and versions that form a program group are determined by an institution according to its own administrative or academic requirements. There is scope to set up groups relating specifically to the fees they attract. It is recommended that users establish a specific program group type, for example FEE-AS, as a USERDEF type, to distinguish fee-related groups.

Three windows are used to enter program triggers. The Program Fee Trigger window is used to specify individual programs. The Program Group Fee Trigger window and the Program Type Fee Trigger window, which deals with program types, can be used to set a single trigger to operate for a particular grouping of a range of programs, as set up in the Program Structure and Planning subsystem.

The Program Group Fee Trigger window shows the fee liability, which is the fee within a category in a fee period, in the Fee Category Fee Liability region and the charge method for which triggers are entered in the Course Type Fee Trigger region.

Program Attributes The window does not accommodate different attributes of the programs in question, but only the program versions making up a group. If only particular attributes of the programs are to invoke fee assessment, this must be handled by setting up rates only for those attributes in the Fee Assessment Rates window. For example, in that window there may be just one rate, which applies for full-time attendance type. This prevents an assessment being made against the selected fee type for student program attempts with any other attendance type.

Deletion of Triggers Logical deletion is a way to remove a trigger from further use while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

For example, there may be some programs that attract a fee for laboratory use. Program versions for these programs could be entered against a program group, LAB-CRS, and this group assigned as a trigger to a liability with the fee type LAB-FEE.

Prerequisites

Program Groups IGSPS012

Responsibility

Oracle Student System Super User

Navigation**From previous procedure: (Setting Up Fee Category Fee Liability):** Click **Program Group Fee Triggers**.**From Navigator:** Student Finance > Setup > Fees > Fee Category Calendars Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Program Group Fee Trigger button > Program Group Fee Trigger window**Steps**

1. To define fee triggers at the program group level, enter data in each field of the window as described in the table.
2. Save your work. Close the window.

Table 18–33 Program Group Fee Triggers Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Fee Category	Default, display only		Fee category
Charge Method	Default, display only		Charge method
Program Group Fee Triggers Region			
Include deleted triggers	Required	Check box	If selected, displays all triggers, including those that have been deleted
Program Group Code	Required	List of values	List of program group codes

Table 18–33 Program Group Fee Triggers Window Description

Field Name	Type	Features	Description
Description	Required		Program group code description
Creation Date	Required	Calendar	Program group code creation date
Deletion Date	Required	Calendar	Program group code deletion date

18.9.2.2.2 Setting Up Program Fee Trigger IGFSI015 The program fee trigger procedure enables users to include a program as a member of a trigger group and create a link between a fee liability and a program, so that only students in the specified program are considered for the fee liability.

In the Process Fee Assessment concurrent process, program fee triggers match program-related fees to corresponding student program attempts. If a program trigger entered against a fee liability matches a student program attempt, the student is eligible for assessment.

If triggers are entered in the Program Fee Trigger window, distinctions can be made between program versions, and within versions, at the program offering and offering option level. This is in contrast to broader groupings that are possible when triggers are entered in the Program Group Fee Trigger window and the Program Type Fee Trigger window at the program version level.

The Program Fee Trigger window is used to enter, maintain, or view programs and combination of criteria for programs that determine the scope of the fee liability selected.

The Program Fee Trigger window is useful in setting up a small number of programs with fees particular to the program, or to a specific method of studying the program. Fees applying to a large number of programs can be set up within program groups or program types. When used for a fee liability with a Composite category, a recorded program can be included as part of a trigger group. Trigger groups are established in the Fee Trigger Group window.

Changes in the application of fees to programs are accomplished by entering values in any of the optional fields. If location code, attendance mode, or attendance type have been selected, the fee assessment routine matches the values given to values held against the student’s program attempt.

Program Attributes The programs that act as triggers are entered in the Program Fee Trigger region.

Distinctions within programs are made depending on the values entered in optional fields.

Trigger Deletion Triggers are removed by deletion while still enabling transaction reversals to be made for those transactions that are already created as a result of the trigger.

For example, for program A700, version 2, was established in 1995. With a postgraduate tuition fee trigger set only for this version, the fee could be restricted to students enrolling in the program in or after 1995.

For another example, a program for which a materials delivery fee is levied only for off-campus students studying through the Warrnambool campus could be represented in this window by entering an off-campus attendance mode and the Warrnambool location code, but leaving all other optional fields blank. The fee would apply to all off-campus students studying through Warrnambool, both full-time and part-time. The fee would also apply to program attempts of any program version and under any academic calendar.

The fields Calendar Type, Alternate Code, Location, and Unit Class are not updateable once the record is saved.

Prerequisites

Program Code IGSPS013

Responsibility

Oracle Student System Super User

Navigation

From previous procedure (Setting Up fee Category fee Liability IGSFI019): Click **Program Fee Trigger**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Program Fee Triggers button > Program Fee Trigger window

Steps

1. To define fee triggers at the program level, enter data in each field of the window as described in the table.
2. Save your work. Close the window

Table 18–34 Program Fee Trigger Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Category	Default, display only		Fee category Note: If the Fee Category field is blank, apportionment data operates at the FTCL level, but with a category shown, the data operates at the FCFL level.
Fee Type	Default, display only		Fee type
Charge Method	Default display only		Charge method
Program Fee Triggers Region			
Include Deleted Triggers	Required	Check box	If selected, displays all triggers, including those that have been deleted
Program Code	Required	List of values	List of program codes Note: Only programs with a system program status of Active or Planned can be selected
Version Number	Optional	List of values	List of version numbers Note: Version number sets the trigger at the program version level.
Title	Required		Program fee trigger title
Trigger Group	Optional	Drop down list	List of trigger groups Note: The list of values presents all groups entered for the liability except those with a deletion date. For fee liabilities with a Composite trigger category, a recorded program can be included as a member of a trigger group by selecting a trigger group number. There is a limit of one program per trigger group. The same program can be used as a member of more than one trigger group for the same fee liability, if required.

Table 18–34 Program Fee Trigger Window Description

Field Name	Type	Features	Description
Calendar Type	Optional	calendar	<p>Calendar type and description</p> <p>Note: The calendar type sets the trigger at the program offering level. Open calendars with a system calendar category of Academic can be selected.</p> <p>Note: After you have saved, this field is no longer updateable.</p>
Location Code	Optional	List of values	<p>Location code and description</p> <p>Note: The location code sets the trigger at the program offering level.</p> <p>Note: After you have saved, this field is no longer updateable.</p>
Attendance Mode	Optional	List of values	<p>Attendance mode and description</p> <p>Note: The attendance mode sets the trigger at the program offering level.</p>
Attendance Type	Optional	List of values	<p>Attendance type and description</p> <p>Note: The attendance type sets the trigger at the program offering level.</p>
Creation Date	Required	Calendar	<p>Program fee creation date</p> <p>Note: Only locations with a system location type of Campus are displayed.</p>
Deletion Date	Required	Calendar	<p>Program fee trigger deletion date; provided by Oracle Student System when a delete is performed</p>

18.9.2.2.3 Setting Up Program Type Fee Triggers IGSFI013 The program type fee trigger procedure creates a link between a fee liability and the set of programs constituting a program type, so that students in the specified programs can be considered for the fee liability.

In the Process Fee Assessments concurrent process, triggers are used to decide whether a fee applies to a particular program a student is studying. If a program trigger entered against a fee liability matches a student program attempt, the student is eligible for assessment.

The following windows are used to enter program triggers.

- The Program Fee Trigger window is used to specify individual programs.
- The Program Type Fee Trigger window can be used to set a single trigger to operate for a particular grouping of a range of programs, as set up in the Program Structure and Planning subsystem.
- The Program Group Fee Trigger window, which deals with program groups, can be used to set a single trigger to operate for a particular grouping of a range of programs, as set up in the Program Structure and Planning subsystem.

The Program Type Fee Trigger window shows the fee liability, which is the fee within a category in a fee period, in the Fee Category Fee Liability region and the charge method for which triggers are entered in the Course Type Fee Trigger region.

The Program Type Fee Trigger window matches program types to fee liabilities, and is typically the window used most frequently in allocating fee triggers. The programs and versions that form a program type follow government classifications, as explained in the documentation for the Program Types window in the Program Structure and Planning subsystem. Program types are assigned to program versions in the Program Ownership window.

The following are examples of government program types to which institution-defined program types are allocated within the system:

- 1 Higher Doctorate
- 8 Bachelor's Graduate Entry
- 60 Open Learning Studies

Fees with a system fee type of HECS are commonly set up with triggers for all award program types, which, in turn, map to government program types. TUITION fees can also have program type triggers.

The Program Type Fee Trigger window is called from the Fee Category Calendar Instances region of the Fee Category Calendar Instance window by clicking the Fee

Liabilities navigation button, then clicking Fee Triggers and Program Type Fee Triggers in the Fee Category Fee Liability window.

Program Attributes The Program Type Fee Trigger window does not accommodate different attributes of the programs in question, but only the program versions established as a particular program type. If only some attributes of the programs are to invoke fee assessment, this must be handled by setting up rates only for those attributes in the Fee Assessment Rates window. For example, in that window there may be just one rate, which applies for an attendance type of full-time. Effectively, this prevents an assessment from being made against the selected fee type for student program attempts with any other attendance type.

Trigger Deletion Logical deletion is a way to remove a trigger from further use while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

Prerequisites

Program Types IGSPS001

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Program Type Fee Triggers**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Program Type Fee Trigger button > Program Type Fee Trigger window

Steps

1. To define fee triggers at the program type level, enter data in the window as described in the table.
2. Save your work. Close the window.
3. Click **Back**.

Note: This concludes the steps necessary to setup Fee Triggers with the Fee Trigger Type = Program.

Table 18–35 Program Type Fee Triggers Window Description

Field Name	Type	Features	Description
Calendar Type	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Fee Category	Default, display only		Fee category
Charge Method	Default, display only		Charge method
Program Type Fee Triggers Region			
Include deleted triggers	Required	Check box	If selected, displays all triggers, including those that have been deleted
Program Type	Required	List of values	List of program types
Description	Required		Program type fee trigger description
Creation Date	Required	Calendar	Program type fee creation date
Deletion Date	Required	Calendar	Program type fee trigger deletion date

18.9.2.2.4 Setting Up Unit Fee Trigger IGSFI016 The unit fee triggers procedure enables users to include one or more units as part of a fee trigger group and create a link between a fee liability and unit, so that only students in the specified units are considered for the fee liability.

In the Process Fee Assessment concurrent process, unit fee triggers match unit-related fees to corresponding student unit attempts. If a unit trigger entered against a fee liability matches a student unit attempt, the student is eligible for assessment for the fee.

Unit triggers are assigned to fees with either a Unit or a Composite trigger category. With the Unit category, the trigger is used for fees relating very specifically to individual units, or a small number of units. For example, a laboratory charge for a particular unit or units. When the category is Composite, the window can be used

to include units as part of a trigger group established in the Fee Trigger Group window. The Unit Set Fee Trigger window records triggers for unit sets.

A unit trigger can be set up to take effect only if it matches one or more attributes. These include a particular teaching calendar, a specified instance of the selected teaching calendar, the location where the unit is studied, and the class in which the unit is undertaken.

The Unit Fee Trigger window is used to enter, maintain, or view the units, and the combinations of criteria for units, that determine the scope of the selected fee liability. Triggers can also be logically deleted.

The following is not updateable information after you save:

- Calendar Type
- Alternate Code
- Location
- Unit Class

Trigger Deletion Logical deletion is a way to remove triggers while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger

Prerequisites

Unit Code IGSPS047

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Fee Triggers**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Unit Fee Trigger window

Steps

1. Enter data in each field of the window as described in the table.
2. Save your work. Close the window.

Note: This concludes the steps necessary to setup Fee Triggers with the Fee Trigger Type = Unit.

Table 18–36 Unit Fee Trigger Window Description

Field Name	Type	Features	Description
Calendar Type	default display only		calendar type and description
Effective Dates	default display only		effective start and end date
Fee Category	default display only		fee category Note: If the Fee Category field is blank, apportionment data operates at the FTCL level, but with a category shown, the data operates at the FCFL level.
Fee Type	default display only		fee type
Charge Method	default display only		charge method
Unit Fee Triggers Region			
Include Deleted Triggers	required	check box	if selected, displays all triggers, including those that have been deleted
Unit Code	required	drop down list	list of unit codes Note: Only units with a system unit status of Active or Planned can be selected.
Version Number	optional	drop down list	list of version numbers Note: Version number sets the trigger at the program version level.
Title	required		unit fee trigger title
Trigger Group	optional	drop down list	list of trigger groups Note: For fee liabilities with a Composite trigger category, enter a unit in a trigger group by selecting a trigger group number. If desired, the same unit can be entered more than once if included in a different trigger group.

Table 18–36 Unit Fee Trigger Window Description

Field Name	Type	Features	Description
Calendar Type	optional	drop down list	calendar type and description Note: Calendar type sets the trigger at the unit offering level.
Alternate Code	optional	drop down list	list of alternate codes Note: The alternate code sets the trigger at the program offering level.
Effective Dates	default display only	calendar	effective start and end dates
Location	optional	drop down list	location and description Note: The location sets the trigger at the unit offering option level.
Unit Class	optional	drop down list	unit class and description Note: The unit class sets the trigger at the unit offering option level.
Creation Date	required	calendar	unit fee trigger creation date
Deletion Date	required	calendar	unit fee trigger deletion date

18.9.2.2.5 Setting Up Fee Trigger Group IGSFI018 The fee trigger group procedure enables users to create a group of triggers linked to a fee liability. Only students with enrollments that match all the member triggers of the group are considered for the fee liability.

Trigger groups are created so that a set of programs, unit set, and unit triggers are collectively used as a single trigger for a fee liability. For the collective trigger to be effective, all the member triggers of the trigger group must match the student's enrollment details. If this occurs, the student is eligible for assessment of the fee.

Trigger groups can be used only for fees with the trigger category type Composite. Members can be a combination of programs, unit sets, and unit triggers. Only one program trigger can be included per trigger group. Program type triggers and program group triggers cannot be included in a trigger group.

The following are valid trigger groups:

- trigger group 1: program, one or more unit sets, and one or more units
- trigger group 2: program and units

- trigger group 3: unit set or sets and a unit or units

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Fee Trigger Groups**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Fee Trigger Groups button > Fee Trigger Group window

Steps

1. To define fee triggers at the fee trigger group level, enter data in each field of the window as described in the table.
2. Save your work. Close the window.

Table 18–37 Fee Trigger Group Window Description

Field Name	Type	Features	Description
Calendar Type and Description	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Fee Category	Default, display only		Fee category
Charge Method	Default, display only		Charge method
Fee Trigger Groups Region			
Include Deleted Groups	Optional	Check box	If selected, displays all groups including those that have been logically deleted

Table 18–37 Fee Trigger Group Window Description

Field Name	Type	Features	Description
Trigger Group	Display only		A trigger group number is supplied automatically by system when the record is saved
Description	Required		Trigger group description
Comments	Optional		Information about fee trigger group
Deletion Date	Display only		Fee trigger group deletion date
Fee Trigger Group Details Region			
Type	Display only		Fee trigger group type
Code	Display only		Fee trigger group code
Version Number	Display only		Fee trigger group version number
Title	Display only		Fee trigger group title

18.9.2.2.6 Setting Up Program Fee Trigger - Composite IGSFI015 The program fee trigger procedure enables users to include a program as a member of a trigger group and create a link between a fee liability and a program, so that only students in the specified program are considered for the fee liability.

In the Process Fee Assessment concurrent process, program fee triggers match program-related fees to corresponding student program attempts. If a program trigger entered against a fee liability matches a student program attempt, the student is eligible for assessment.

If triggers are entered in the Program Fee Trigger window, distinctions can be made between program versions, and within versions, at the program offering and offering option level. This is in contrast to broader groupings that are possible when triggers are entered in the Program Group Fee Trigger window and the Program Type Fee Trigger window at the program version level.

The Program Fee Trigger window is used to enter, maintain, or view programs and combination of criteria for programs that determine the scope of the fee liability selected.

The Program Fee Trigger window is useful in setting up a small number of programs with fees particular to the program, or to a specific method of studying the program. Fees applying to a large number of programs can be set up within program groups or program types. When used for a fee liability with a Composite

category, a recorded program can be included as part of a trigger group. Trigger groups are established in the Fee Trigger Group window.

Changes in the application of fees to programs are accomplished by entering values in any of the optional fields. If location code, attendance mode, or attendance type have been selected, the fee assessment routine matches the values given to values held against the student's program attempt.

Program Attributes The programs that act as triggers are entered in the Program Fee Trigger region. Distinctions within programs are made depending on the values entered in optional fields.

Trigger Deletion Triggers are removed by deletion while still enabling transaction reversals to be made for those transactions that are already created as a result of the trigger.

For example, for program A700, version 2, was established in 1995. With a postgraduate tuition fee trigger set only for this version, the fee could be restricted to students enrolling in the program in or after 1995.

For another example, a program for which a materials delivery fee is levied only for off-campus students studying through the Warrnambool campus could be represented in this window by entering an off-campus attendance mode and the Warrnambool location code, but leaving all other optional fields blank. The fee would apply to all off-campus students studying through Warrnambool, both full-time and part-time. The fee would also apply to program attempts of any program version and under any academic calendar.

The fields Calendar Type, Alternate Code, Location, and Unit Class are not updateable once the record is saved.

Prerequisites

Program Code IGSPS013

If program is to be grouped with unit and/or unit set, Fee Trigger Group IGSFI017.

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Program Fee Triggers**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Program Fee Triggers button > Program Fee Trigger (Composite) window

Steps

1. Enter data in each field of the window as described in "Setting Up Program Fee Trigger IGFSI015" in the Program Fee Trigger window description table.
2. Save your work. Close the window.

18.9.2.2.7 Setting Up Unit Fee Trigger - Composite IGFSI016 the unit fee triggers procedure enables users to include one or more units as part of a fee trigger group and create a link between a fee liability and unit, so that only students in the specified units are considered for the fee liability.

In the Process Fee Assessment concurrent process, unit fee triggers match unit-related fees to corresponding student unit attempts. If a unit trigger entered against a fee liability matches a student unit attempt, the student is eligible for assessment for the fee.

Unit triggers are assigned to fees with either a Unit or a Composite trigger category. With the Unit category, the trigger is used for fees relating very specifically to individual units, or a small number of units. For example, a laboratory charge for a particular unit or units. When the category is Composite, the window can be used to include units as part of a trigger group established in the Fee Trigger Group window. The Unit Set Fee Trigger window records triggers for unit sets.

A unit trigger can be set up to take effect only if it matches one or more attributes. These include a particular teaching calendar, a specified instance of the selected teaching calendar, the location where the unit is studied, and the class in which the unit is undertaken.

The Unit Fee Trigger window is used to enter, maintain, or view the units, and the combinations of criteria for units, that determine the scope of the selected fee liability. Triggers can also be logically deleted.

The following is not updateable information after you save:

- Calendar Type
- Alternate Code
- Location
- Unit Class

Trigger Deletion Logical deletion is a way to remove triggers while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

Prerequisites

Unit Code IGSPS047

If program is to be grouped with program and/or unit set, Fee Trigger Group IGSFI017.

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Unit Fee Triggers**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Unit Fee Triggers button > Unit Fee Trigger (Composite) window

Steps

1. To define fee triggers at the unit level, enter data as described in "Setting Up Unit Fee Trigger IGSFI016" in the unit fee trigger window description table.
2. Save your work. Close the window.

18.9.2.2.8 Setting Up Unit Set Fee Trigger - Composite IGSFI018 The unit set fee triggers procedure enables users to include one or more unit sets as part of a fee trigger group and create a link between a fee liability and unit set. By creating a link, only students in the specified unit sets are considered for the fee liability.

Unit set fee triggers enable the Process Fee Assessment concurrent process to match fees related to unit sets to corresponding student unit set attempts. If a unit set trigger entered against a fee liability matches a student unit set attempt, the student is eligible for assessment of the fee.

Unit set triggers can be assigned to fees with either trigger category type Unitset or Composite. An example of using a trigger with type Unitset is to charge a fee only to students undertaking a certain major sequence.

When the Unit Set Fee Trigger window is used with a Composite category, unit sets can be included as part of a trigger group, which is established in the Fee Trigger

Group window. For example, a particular stream for a program can be associated with a fee liability.

Prerequisites

Unit Set IGSPS065

If program is to be grouped with program and/or unit, Fee Trigger Group IGSFI017.

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Unit Set Fee Triggers**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Unit Set Fee Triggers button > Unit Set Fee Trigger (Composite) window

Steps

1. To define fee triggers at the unit set level, enter data in each field of the window as described in the table.
2. Save your work. Close the window.

Note: This concludes the steps necessary to setup Fee Triggers with the Fee Trigger Type = Composite.

Table 18–38 Unit Set Fee Trigger Window Description

Field Name	Type	Features	Description
Calendar Type and Description	Default, display only		Calendar type and description
Effective Dates	Default, display only		Effective start and end dates
Fee Type	Default, display only		Fee type
Fee Category	Default, display only		Fee category

Table 18–38 Unit Set Fee Trigger Window Description

Field Name	Type	Features	Description
Charge Method	Default, display only		Charge method
Unit Set Fee Triggers Region			
Include Deleted Triggers	Required	Check box	If selected, displays all triggers, including those that have been deleted
Unit Set Code	Required	List of values	List of unit set codes Note: Only unit sets with a system unit status of Active or Planned can be selected.
Version Number	Display only		Unit set fee trigger version number
Title	Display only		Unit set fee trigger title
Trigger Group	Display only		List of trigger groups
Creation Date	Required	Calendar	Unit set fee trigger creation date
Deletion Date	Required	Calendar	Unit set fee trigger deletion date

18.9.2.2.9 Setting Up Unit Set Fee Trigger IGSFI018 The unit fee triggers procedure enables users to include one or more units as part of a fee trigger group and create a link between a fee liability and unit, so that only students in the specified units are considered for the fee liability.

In the Process Fee Assessment concurrent process, unit fee triggers match unit-related fees to corresponding student unit attempts. If a unit trigger entered against a fee liability matches a student unit attempt, the student is eligible for assessment for the fee.

Unit triggers are assigned to fees with either a Unit or a Composite trigger category. With the Unit category, the trigger is used for fees relating very specifically to individual units, or a small number of units. For example, a laboratory charge for a particular unit or units. When the category is Composite, the window can be used to include units as part of a trigger group established in the Fee Trigger Group window. The Unit Set Fee Trigger window records triggers for unit sets.

A unit trigger can be set up to take effect only if it matches one or more attributes. These include a particular teaching calendar, a specified instance of the selected teaching calendar, the location where the unit is studied, and the class in which the unit is undertaken.

The Unit Fee Trigger window is used to enter, maintain, or view the units, and the combinations of criteria for units, that determine the scope of the selected fee liability. Triggers can also be logically deleted.

The following is not updateable information after you save:

- Calendar Type
- Alternate Code
- Location
- Unit Class

Trigger Deletion Logical deletion is a way to remove triggers while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

Prerequisites

Unit Set IGSPS065

Responsibility

Oracle Student System Super User

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Unit Set Fee Trigger**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Triggers button > Unit Set Fee Trigger window

Steps

1. Enter data as described in "Setting Up Unit Set Fee Trigger - Composite IGSFI018" in the unit set fee trigger window description table.
2. Save your work. Close the window.

Note: This concludes the steps necessary to setup Fee Triggers with the Fee Trigger Type = Unit Set.

18.9.2.3 Setting Up Fee Assessment Rates - Fee Category IGSFI021

Fee calculation is required if defining at the Fee Category Calendar Instance level and not available if defined at the Fee Type Calendar Instance level.

The fee assessment rates procedure creates and maintains a fee assessment rate or set of rates that apply to a fee.

Rates shown in the Fee Assessment Rates window are used by the Process Fee Assessment and Process Fee Assessment From To Do Entries concurrent processes.

The enrollment attributes as determined by the Fee Assessment process are compared with the rates attributed to determine the rate value to be used for assessment. In determining applicable charge rates, program attributes in the Fee Assessment Rates window are matched to nominated student program attempt attributes in cases in which the assessment is predictive and the student is not currently enrolled for the fee calendar instance concerned or the derived student program attempt attributes for enrolled students.

The fee type calendar instance associated with the system fee type, Document, has an account hierarchy defined only with the fee type entity. If there is a change in org unit when fee assess is rerun, it reverses the original transaction and creates a fresh transaction with the new changed organization unit even if there is no change in the final assessment amount.

Levels

Assessment rate data can be attached at the FTCL level, with the rates for a fee applying regardless of category, or at the FCFL level, with the rate or rates applying to the fee only within the category selected. Fees with a system fee trigger category of Institution must be specified only at the FTCL level because these fees are levied once across all the program attempts of students at the institution, regardless of their fee category.

Other than fees with a system fee trigger category of Institution, rates can exist at either level but not at both levels for the same fee type.

Level Access

The Fee Assessment Rates window is accessed at the following levels:

- FTCL level by the Assessment Rates button in the Fee Type Calendar Instances window
- FCFL level by the Fee Calculations button and then Fee Type Calendar Instance Assessment Rate button in the Fee Category Fee Liability window. The Fee

Assessment Rates window can be accessed from the FCFL level, but only to display the existing data.

Multiple Rates

Within a level, multiple charge rates can be set up for a single fee, depending on various enrollment attributes such as location, attendance type, attendance mode. For example, the rate of a general service fee may depend on the location where a student is studying. When setting up these attributes, the circumstances of all students due to pay the fee must be covered.

Reference

In some circumstances, rates specified in the Fee Assessment Rates window affect individual assessment contracts with a student.

Prerequisites

Fee Periods IGSCA002

Fee Types IGSFI012

Location Code IGSOR010

Attendance Type IGSPS006

Attendance Mode IGSPS005

Class Standing IGSPR015

Program IGSPS013

Organization IGSOR013

Residency Status IGSPE007

Responsibility

Oracle Student System Super User

Navigation

From the previous procedure (Setting Up fee Category Fee Liability): Click **Fee Calculations**. > Click **Fee Type Calendar Assessment Rate**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Calculations button > Fee Type Calendar Assessment Instance Rate button > Fee Assessments rates window

Steps

1. Enter data as described in "Setting Up Fee Assessment Rates - Fee Type IGSFI021" in the fee assessment rates window description table.
2. Save your work. Click **Back**.
3. Click back arrow (up arrow).

18.9.2.4 Setting Up Element Ranges - Fee Category IGSFI020

Element ranges setup is required if defining at the Fee Category level, not available if defined at the Fee Type level and not available for Fee Trigger Type Institution.

The element ranges procedure enables users to create element ranges for a fee type within which specific charge rates apply.

For fee types with a charge method of Efts, Credit Point, or Charge Per Unit, rates entered in the Fee Assessment Rates window can be assigned to element ranges entered in the Element Ranges window. For example, if the charge method is Charge Per Unit, a range of 9.000 to 12.000 can be set up, with a rate applied specifically to eligible students whose total calculated load for the relevant fee period falls within that range.

An important feature of the Element Ranges window is the ability to override the standard charge method for the fee by setting a Flatrate charge method for one or more ranges. In this case, all eligible students with a load falling within the range are charged the same amount for the fee.

Users cannot access the Element Ranges window if the existing charge method for the fee is Flatrate.

Levels

For a particular fee, element ranges are specified at the FTCL level if the ranges operate for the selected fee regardless of category, or at the FCFL level if the ranges apply only to the fee within the category selected. They cannot be specified at both levels for the same fee type. Fees with a trigger category of Institution can have element ranges entered only at the FTCL level.

The window is accessed at the following levels:

- FTCL level using the Element Ranges button in the Fee Type Calendar Instances window
- FCFL level using the Fee Calculations button and the Element Ranges button, or the Fee Type Calendar Instance Elements Range button, in the Fee Category Fee Liability window

Note: The Fee Type Calendar Instance Elements Range button on the Fee Category Fee Liability window is displayed when ranges are already entered at the FTCI level. The window can still be accessed from the FCFL level, but only to display the existing data.

Recording Range Rates

For each range specified in the Elements Range region, a rate or rates from those already entered in the Fee Assessment Rates window can be assigned in the Elements Range Rate region. An element range rate record is created when a rate is assigned to an element range.

Example 1

The institution offers international students studying full-time a tuition fee of \$5,000 per semester. However, this arrangement applies only if students study three or four units per semester. If they drop below this load, or take more than four units, a fee of \$1,700 per unit is used.

To implement this in a one-semester fee period for Tuition fee type in the Internatnl category with a Perunit charge method, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$1,700 and Rate Number 2 for \$5,000.
- In the Element Ranges window, define three range entries.

Define the following range entries:

- Lower Range value = no entry; Upper Range value = 2; Rate Number 1
- Lower Range value = 3; Upper Range value = 4; FLATRATE Override Charge Method Type; Rate Number 2
- Lower Range value = 5; Upper Range value = no entry; Rate Number 1

The fee assessment calculation is as follows:

- Student with a load of 1 unit: 1 times 1700 = \$1,700
- Student with a load of 2 units: 2 times 1700 = \$3,400
- Student with a load of 3 or 4 units: 1 times 5000 = \$5,000 that is the flat rate for this element range
- Student with a load of 5 units: 5 times 1700 = \$8,500

Example 2

A discount on a computer access fee is applied to students in computer science programs if their credit point load is over a certain value.

To implement a discount in a one-semester fee period for a COMP-ACC fee type with a CRPOINT charge method and triggered by computer science programs, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$10 and Rate Number 2 for \$8.
- In the Element Ranges window, assign Rate Number 1 to a range with a Lower Range value of 1 and an Upper Range value of 9. Assign Rate Number 2 to a range with a Lower Range value of 10 and an Upper Range value of 12.

The fee assessment calculation is as follows:

- Student with a load of 3 credit points: 3 times 10 = \$30
- Student with a load of 4 credit points: 4 times 10 = \$40
- Student with a load of 9 credit points: 9 times 10 = \$90
- Student with a load of 10 credit points: 10 times 8 = \$80
- Student with a load of 11 credit points: 11 times 8 = \$88
- Student with a load of 12 credit points: 12 times 8 = \$96

Prerequisites

Assessment Rates IGSFI021

Responsibility

Oracle Student System Super User

Navigation

From the previous procedure (Setting Up Fee category Fee Liability): Click **Fee Calculations**. Click **Element Ranges**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance window > Fee Liabilities button > Fee Category Fee Liability window > Fee Calculations button > Elements Range button > Element Ranges window

Steps

Note: This procedure is required when defining at the fee category level. The Element Ranges button is not available at the Fee Type level and for the institution fee trigger type.

1. Enter data as described in "Setting Up Element Ranges - Fee Type IGSFI020" in the element ranges window description table.
2. Save your work. Click **Back** to return to the fee category Fee Liability window.
3. Close the window to return to the Fee Category Calendar Instance window.
4. Create additional fee category calendar instances or close the window.

18.10 Credits

Credits are created in the following ways through:

- Receipts
- Sponsorships
- Financial Aid
- Receivables Lockbox
- Self-Service

Receipts

Administrative users can handle over the counter payments for students as well as enter and record receipts of all instruments such as cash, check, and credit card.

Sponsorships

Sponsors can undertake to pay for all or a portion of a student's tuition and fees, for specific terms. The sponsorships functionality captures details of the sponsorships and relates them to the student. The sponsorship function also enables users to assign students to a sponsor and maintains details of which fee classes the sponsor pays for, in what amounts or percentages, programs and units.

Financial Aid

Financial aid that is disbursed from the Financial Aid subsystem can be imported into Student Finance as a credit on the student's account.

Receivables Lockbox

Receipts that are received in Oracle Receivables via AR Lockbox interface can be integrated into Student Finance as a credit on the student's account.

Self-Service

Users have the ability to pay via Self Service.

All credits are created using the Credits API and these credits are listed in the Account Summary.

Creating Credits on Students' Accounts

There are three ways to create a credit on a student's account. These include the following:

- Credit through the Receipts window
- Credit through Financial Aid or Sponsorships
- Credit through Oracle Receivables AutoLockbox

Credits must be classified by various attributes in order to segregate their processing and accounting. There are two attributes into which credits are classified: credit class and credit type.

Credit through the Receipts window

Student payments entered through the Receipts window are submitted to the Credits API, that validates all required data. If the payment validation is successful, the Credits API calls the Build Accounts Process for the accounting distributions for the payment.

Credit through Financial Aid or Sponsorships

Once the Award Disbursement Transfer to Student Account and the Sponsorships Concurrent Processes have been run, individual records are passed to the Credits API. The imported records are submitted to the Credits API, which validates all required data. If the payment validation is successful, the Credits API calls the Build Accounts process for the accounting distributions for the payment.

For information on Transfer Fin Aid transactions to Student Account, see *Oracle Student System User's Guide*.

For information on Sponsorships Concurrent Processes, see *Oracle Student System User's Guide*.

Credit through Oracle Receivables AutoLockbox

After the receipts are imported into Oracle Receivables, unapplied receipts are created in Oracle Receivables. The import process from Oracle Receivables is run from Student System. The imported records are submitted to the Credits API, which validates all required data. If the payment validation is successful, the Credits API calls the Build Accounts Hierarchy API for the accounting distributions for the payment.

For information on Oracle Receivables, see Oracle Accounts Receivables User's Guide.

18.10.1 Setting Up Credit Type IGSFI050

The credit type procedure enables you to define a credit type and associate attributes and accounts to it.

The credit type is a key concept and an attribute of a credit transaction. The credit type provides debit and credit accounts for the credit transaction. It also determines whether a credit transaction is allowed for refund or not. In addition, the credit type can be identified as Title IV funds for US Financial Aid purposes.

You can set up credit types. Credit classes are seeded. The default debit of the accounting is setup as a single user-defined clearing account.

You can override the accounting information.

Credits with the credit class of NEGATIVE CHARGE Adjustment can be applied only to the charge that is the source of the negative adjustment. In other words, applications hierarchy does not apply to the credit types that have the credit class of NEGATIVE CHARGE Adjustment.

Prerequisites

System Option: IGSFI037

If using Oracle Financials, Oracle General Ledger setup.

If using Non-Oracle Financials, Fee Posting Accounts IGSFI004

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > System > Credit Type

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–39 Credit Type Window Description

Field Name	Type	Features	Description
Name	Required		Credit type name
Description	Optional		Credit type description
Credit Class	Required	List of values	List of credit classes Valid values include Negative Charge Adjustment, Enrollment Deposit, External Financial Aid, Internal Financial Aid, Online Payment, Other Deposit, Payment, and Sponsorship.
Effective Dates	Required	Calendar	Credit type effective dates
Refund Allowed	Optional	Check box	Associated with a credit type Note: The Refunds process considers the value of this flag when processing the refund for a credit having the credit type. For example, if the Refund Allowed flag is unchecked for a credit type, the Refunds does not process the refund for a credit having this credit type.
Title IV	Optional	Check box	If selected, indicates if credit in the student account of this type is a Title IV credit, used by the refund process
[Descriptive Flex field]	Optional		User-customization field
GL Accounts Region			
Debit	Required	List of values	Debit account code
[Descriptive Flex field]	Optional		User-customization field
Credit	Optional	List of values	Credit account code
[Descriptive Flex field]	Optional		User-customization field
Forfeiture	Display only		GL accounts forfeiture
Description	Display only		GL accounts description

18.11 Application Rules

18.11.1 Setting Up Application Hierarchies IGSFI053

The application hierarchy defines the hierarchy or order of fee types that a credit or payment should be associated with, to reduce the balance due amount of charges for a student.

Prerequisites

Fee Types IGSFI012

Credit Types IGSFI050

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > System > Application Hierarchies window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–40 Application Hierarchies Window Description

Field Name	Type	Features	Description
Name	Required		Application hierarchy name
Version Number	Display only		Application hierarchy version
Description	Optional		Application hierarchy description
Effective Dates	Required	Calendar	Application hierarchy effective dates; defaults to current date Note: Start Date is required and End Date is optional.
Credit Type	Required	List of values	Application hierarchy credit type All credit types except Enrollment Deposit and Other Deposit are valid.
Hierarchy Rules Region			
Allowable tab			
Fee Type	Required	List of values	Application hierarchy fee type

Table 18–40 Application Hierarchies Window Description

Field Name	Type	Features	Description
Description	Display only		Application hierarchy fee type description
Sequence			Identifies the order in which the credit type is applied to the fee types defined
Enable		Check box	If selected, indicates that the Mass Application process considers the fee type has been defined
Additional Authorized tab			
Fee Type	Required	List of values	Application hierarchy fee type
Description	Display only		Application hierarchy fee type description
Sequence			Identifies the order in which the credit type is applied to the fee types defined
Enable		Check box	If selected, indicates that the Mass Application process considers the fee type has been defined

18.12 Balance Rules

18.12.1 Setting Up Balance Rules IGSFI044

Balance rules are used to determine the charges and credit transactions that are to be excluded from the balance calculation. At the system level, there are two balance lookup codes. They are Fee Balance and Holds Balance.

The balance rules procedure enables you to define exclusions of fee types and credit types for the balance type of fee and hold. Setting up an initial Holds balance rule is required.

Records in this window cannot be deleted.

Prerequisites

Fee Types IGSFI012

Credit Types IGSFI050

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > System > Balance Rules window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–41 Balance Rules Window Description

Field Name	Type	Features	Description
Balance Type	Required	List of values	Balance rule type Valid values include Fee and Holds.
Description	Display only		Balance rule description
Version Number	Display only		Balance rule version number
Exclusion Region			
Fee Type Tab			
Fee Type	Required	List of values	Listing of Fee Type exclusions in the Balance Type calculation
Description	Display only		Fee Type descriptions Note: New fields can be created within the Fee Type Tab but fields cannot be deleted or updated
Credit Type Tab			
Credit Type	Required	List of values	Listing of Credit Types to be excluded from the Balance Type calculation
Description	Display only		Credit Type description Note: New fields can be created within the Fee Type Tab but fields cannot be deleted or updated

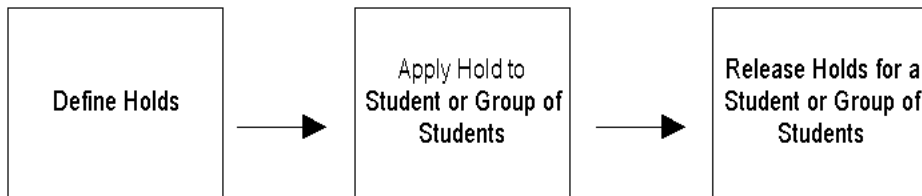
18.13 Hold Plans IGSFI068

Holds functionality enables users to place a financial hold on a student's account based on the student's past due balance or balance outstanding of specific student charges. Only holds having administrative hold effects can be applied. Users can define rules for placing holds and view holds that are placed. Holds have to be released through the concurrent manager or Receipts window. Holds placed on a student can be viewed from the Person Holds Details window navigable from the Holds button in the Account Summary window.

Holds functionality begins with defining hold plans. Users define rules for placing holds. Then the hold is applied to a student or group of students. Once payment has been received, holds are released.

Figure 18–3 shows the holds process.

Figure 18–3 Holds Process



Defining Holds

Defining holds includes setting up and establishing the rules for placing holds to a student account at various levels:

- fee type
- student level

Holds Plan

If the hold plan is defined using one fee type, it implies that the hold plan is at a fee type level.

A hold plan can be defined at the fee type level or at an account level. A hold plan can have either threshold amount or threshold percentage defined but not both.

The holds plan is set up by you in the Holds Plan window.

The attributes of a holds plan includes:

- Holds Threshold Amount
- Holds Threshold Percentage
- Hold Types

Holds Threshold Amount

If the balance is past due, or the individual fee type balance of the holds plan for the student or fee type is greater than the holds threshold amount, a hold is placed against the student. If the total outstanding balance on the process end date is greater than the threshold amount defined at the hold plan, holds are applied.

Holds Threshold Percentage

If the balance is past due, or the individual fee type balance of the holds plan for the student or fee type is greater than the holds threshold percentage of the total balance at the respective level, a hold is placed against the student. If ratio of the total outstanding balance on the process end date and outstanding charges on the process start date is greater than the threshold percentage defined at the hold plan, holds are applied.

Hold Types

The hold types are user-defined and must map to one or more system-defined hold effects type. The system-defined hold effects types prevent the student from receiving certain administrative services at the institution.

18.13.1 Setting Up Holds Plans

The holds setup procedure enables users to set up and establish rules for placing holds on a student account at the following levels:

- fee type
- account

If a hold plan is defined at the account level, the Holds Application process considers the account balance. If the hold plan level is fee type, the holds application process considers the fee type balances.

The threshold amount or threshold percentage are deciding factors that determine whether to place or release a particular hold type.

To place a hold on a student, users can use the holds application process. The holds application process considers the hold plan and the criteria defined in a hold plan to determine whether a hold can be placed on a student.

To release a hold from a student, users can use the holds release process. The holds release process in turn considers the hold plan.

Prerequisites

Fee Types IGSFI012

Hold Types IGSFI042

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Holds Plans window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–42 Hold Plans Window Description

Field Name	Type	Features	Description
Hold Plan	Required		Hold plan name
Description	Required		Hold plan description
Level	Required	Drop-down list	Hold plan level Valid values include Account and Fee Type
Hold Type	Required	List of values	Hold type associated with the hold plan and hold type description Note: The hold type specified for a hold plan is Administrative.
Threshold Amount	Optional		Hold plan threshold amount
Threshold%	Optional		Hold plan threshold percentage
Closed	Optional	Check box	If selected, indicates that the hold plan is closed

18.14 Setting Up Finance and Late Charges IGSFI067

Once charges are created on the student account, students are liable to pay the charges within a specific period of time. If these charges are not paid, institutions require the ability to assess and apply a late fee or finance charge as per an institution’s policy.

Institutions can create various late fee or finance charge plans. The plans created are used as a parameter to calculate the late fee or finance charge.

Defining Late Fees and Finance Plans

The Finance and Late Charge Plan window drives all subsequent processing.

There is no restriction on the number of finance charge or late fee plans that can be created for a plan type.

For cash basis accounting, Student System enables users to charge finance charges but not recognize revenue unless interest is paid. For accrual basis accounting, revenue is recognized when the finance charge is created.

Calculating Late Fees

Student System calculates late fees through a concurrent program which selects transactions from the charges and credits table. A balance is calculated with properties of eligible, overdue, and the Calculate Balance concurrent process.

The plan is fetched before the balance is checked. The rate details exist in the plan and the late fee can be a flat amount or can be based on a percentage rate.

The student account charges table is then updated with amount, account type, General Ledger code, and effective date. If there are more balances, the process is run for more students. It always processes using the Fee Balance Type.

Creating Late Fees and Finance Charges

The Late Fee and Finance Charge Process determines and assesses late fee charges and finance charges.

The date the concurrent process is run affects the number of days the account is past due after the payment due date. This due date is as mentioned in the concurrent process parameter.

Depending on the charge method mentioned in the plan, these concurrent processes calculate the charge amount following average daily balance, flat interest rate, or flat amount.

The average daily balance is calculated by the overdue balance amount on the past due date and continued until the date the Finance and Late Charge Process concurrent process is run.

The finance and late charge plan procedure enables you to set up data for financial charge or late fee late plan that can be used in the Calculate Finance and Late Charge process.

You can define a name for the plan and capture all attributes of the plan in the Finance and Late Charge Plan window.

A single plan corresponds to either a finance charge or a late fee, but not both simultaneously. If users need a plan for both, they can create two plans.

You can also define multiple plans for a particular plan type. There are two plan types, Finance and Late. The Finance plan type corresponds to Finance charge plan and the Late plan type corresponds to the Late fee plan.

Prerequisites

Fee Type IGSFI012 (with System Fee Type of Finance and Late Fee)

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Finance and Late Charge Plan window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–43 *Finance and Late Charge Plan Window Description*

Field Name	Type	Features	Description
Plan Name	Required		user-defined finance or late charge plan name
Plan Type	Required	list of values	finance and late charge plan type
Closed	Optional	check box	if selected, indicates that finance and late charge plan is closed and cannot be used in charge calculation
Description	Optional		finance and late charge plan description
Balance Type	Required	list of values	Defaults to Fee and can not be updated.
Fee Type	Required	list of values	fee type used to create finance or late charge on party account
Accrual Type	Required	list of values	finance and late charge plan accrual type Note: If the plan type is Finance, values are Average Daily Balance past due date and Average Daily Balance past cut off date. If the plan type is Late, values are Flat Rate and Flat Amount.
Offset Days	Optional		finance and late charge plan offset days Note: Offset days are added to the balance due date to arrive at the date when the particular fee is due.
Charge Rate	Optional		finance and late charge plan charge rate Note: The field is enabled when the plan type is Late and accrual type is Flat Rate. This field is enabled when the plan type is Finance and the accrual type is average daily balance past cutoff date or average daily balance past due date.

Table 18–43 Finance and Late Charge Plan Window Description

Field Name	Type	Features	Description
Flat Amount	Optional		late charge plan flat amount only in case of Late charge and accrual type in Flat Amount Note: The field is enabled when the plan type is Late and accrual type is Flat Amount.
Min Balance Amount	Optional		finance and late charge plan minimum balance amount Note: The field is enabled for plan type, Late.
Min Charge Amount	Optional		finance and late charge plan minimum charge amount Note: The field is disabled for accrual type, Flat Amount.
Max Charge Amount	Optional		finance and late charge plan maximum charge amount Note: The field is disabled for accrual type, Flat Amount.
Min Charge Amount No Charge	Optional		minimum charge amount when no charge is made on a student account Note: The field is disabled for accrual type, Flat Amount.
[Descriptive Flexfield]	Optional		user-customization field

18.15 Refund Tolerance Limits

18.15.1 Setting Up Refund Tolerance Limits IGSFI065

Users can set up an upper limit and a lower limit for a period. If the refund amount is higher or lower than the tolerance limit, the automatic refunds through the batch process cannot be complete and users must do a manual refund.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Refund Tolerance Limits > Refund Tolerance Limits window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–44 Refund Tolerance Limits Window Description

Field Name	Type	Features	Description
Start Date	Required	Calendar	Refund tolerance limit start date Note: The refund tolerance limit period identified by the start date and end date should not overlap.
End Date	Optional	Calendar	Refund tolerance limit end date Note: The refund tolerance limit period identified by the start date and end date should not overlap.
Lower Limit	Optional		Refund tolerance lower limit
Upper Limit	Optional		Refund tolerance upper limit

18.16 Sponsorships

Sponsors can undertake to pay for all or a portion of a student’s tuition and fees, for specific terms. The sponsorships functionality captures details of the sponsorships and relates them to the student.

The sponsorship function also enables users to assign students to a sponsor and maintains details of which fee classes the sponsor pays for, and what percentage of the fees (or the maximum amount) the sponsor is willing to pay.

Sponsorships Processes

Sponsorships function includes the following processes:

- Base Record - Create Financial Aid Base Record Process
- Awards - Rollover Sponsorship Attributes Process
- Awards - Assign Sponsorship Awards Process

Base Record - Create Financial Aid Base Record Process

Create Financial Aid Base Record process collects person information from Oracle Student System records and creates corresponding records in the Financial Aid subsystem. This process is a prerequisite for Assigning students to sponsor and also for Sponsor award process.

Awards - Rollover Sponsorship Attributes Process

Sponsor rollover process carries forward the details of sponsor setup or sponsor-student relationships, or both to the following award year. Users can specify which details are to be rolled over.

The create financial aid base record process must be run before running sponsor rollover process.

Awards - Assign Sponsorship Awards Process

Sponsor Awards process creates both awards and disbursements for a fund in the Financial Aid subsystem. When the process is run with the actual award type parameter, it also checks for eligibility criteria and validations before awarding the sponsor amount to the students.

When the process is run in the test mode, no database update takes place, and only a report is generated.

Awarding money to the students can be performed manually through the student awards window in addition to awarding money through the sponsor award process.

18.16.1 Setting Up Sponsorship

Sponsorship functionality makes use of certain setup windows that are maintained in the Financial Aid subsystem. The following setup windows are required to support Sponsorship functionality:

Fund Type IGFAW009

Fund Code IGFAW008

System Award Year Mappings IGFAW018

Fund Calendar Relations IGFAW018

See Chapter 20, "Financial Aid" for information about these windows.

18.17 Accounting Period Statuses

18.17.1 Setting Up Open/Close Accounting Periods IGSFI071

The Open / Close Accounting Periods window is used to maintain the accounting period statuses in Student Finance when using Oracle General Ledger.

You cannot create or delete any new accounting periods in this window. New accounting periods are created within the Accounting Calendar in General Ledger and appear in Student System with the status of Not Opened. You can change this status.

The following table describes statuses and their definitions:

Table 18–45 Accounting Period Statuses

Status	Description
Not Opened	<p>This period has never been opened.</p> <p>Any new period created in a calendar defaults to this status in the Student Finance subledger.</p> <p>You cannot create any transaction in this period and no transactions are allowed to post to General Ledger in this period.</p> <p>The only change allowed from Not Opened is to Open or Future.</p>
Future	<p>This period is not yet open.</p> <p>You can create transactions in this period, but you cannot post to General Ledger.</p> <p>The only change allowed from Future is to Open.</p>
Open	<p>Transaction entry and posting to General Ledger are allowed in this period.</p> <p>The only change allowed from Open is to Close Pending or Closed.</p>
Closed	<p>Transaction entry and posting to General Ledger are not allowed in this period.</p> <p>Before you close a period, you must verify that there are no unposted items in the period. You must post all transactions from Student Finance to the GL_INTERFACE table before the period can be closed.</p> <p>The only change allowed from Closed is to Close Pending or Open.</p>

Table 18–45 Accounting Period Statuses

Status	Description
Close Pending	<p>Transaction entry and posting to General Ledger are not allowed in this period.</p> <p>There is no validation for unposted items. You can change the status from Open to Close Pending without posting all of the transactions to the GL_INTERFACE table.</p> <p>The only change allowed from Close Pending is to Open or Closed.</p>

Changing Period Statuses

There are validations when you try to change the status of a period from Open or Close Pending to Closed.

In Accrual Basis accounting, Student System checks for unposted transaction in the following tables:

- charges line table
- credit activities table
- applications table

In Cash Basis accounting, Student System checks for unposted transactions in the following tables:

- credit activities table
- applications table

Note: Unposted transactions do not have any value for both the posting ID and the posting control ID.

When you change the period status from Not Opened to Future, Student System check the future periods setup in the Set of Books attached to the System Options window. In the set of books, you can specify how many periods are allowed to have the status of Future (the number of future periods there can be there any one point in time).

Prerequisites

Oracle Financials must be set to Yes in the System Options window.

Responsibility

Oracle Student System Super User

Navigation

Student Finance > Setup > Accounting > Open / Close Periods

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 18–46 Open / Close Accounting Periods Window Description

Field Name	Type	Features	Description
Latest Open Period	Required	Display only	Displays the latest open period available to you Note: If there is no period with an Open status, the field is blank.
Open Next Period	Optional	Button	when clicked, changes the status of the period from Not Opened to Open
Accounting Periods Region			
Status	Required	List of values	Status of the period. Valid values include: Not Opened Open Future Closed Close Pending Values are seeded lookup values.
Number	Required	Display only	Period number within the fiscal year; PERIOD_NUM from the Accounting Calendar General Ledger table
Fiscal Year	Required	Display only	Fiscal year of the period; PERIOD_YEAR from the Accounting Calendar General Ledger table
Name	Required	Display only	PERIOD_NAME from the Accounting Calendar General Ledger table
Start Date	Required	Display only	START_DATE from the Accounting Calendar General Ledger table
End Date	Required	Display only	End Date from the Accounting Calendar General Ledger table
[]	Optional		field for user-customization

19.1 Research Overview

The Research windows manage all processes related to research students within an institution. Research students are those who have applied for or enrolled in a research program and unit.

The Research windows interact with other subsystems, such as Admissions, Enrollments, and Assessments.

The functionality provided through Research can be used in various ways to best suit an institution's requirements. In addition to managing research students, some functions in the subsystem can also be used for student administration in other programs.

For example, an Architecture program can require a student to complete a project each year, in coursework units called Special Project 1, 2, and 3, that use the standard method for Full Time Equivalent, or FTE, calculation. The recording, tracking, monitoring, and examination of the student's project can use Candidacy and Thesis functionality from the Research windows. A student program attempt can have only one candidacy, but the candidacy can have multiple theses, so each year's project can become a new thesis.

Research Program Structures

A Program Structure and Planning specialist establishes Research Program Structures. Aspects of the Program Structure and Planning that have implications in Research Subsystem are as follows:

- Program Types
- Attendance Types
- Minimum Submission Percentages

Program Types

Each program offered by an institution has a program type attribute. Program types and their associated Research indicators are maintained in the Program Types window. Setting the Research indicator does not determine if the program is classified as a research program for government reporting purposes. However, the Research indicator must be selected for those program types the institution requires a candidacy record be created during admission or for enrollment.

An applicant for admission to a program that has the Research indicator set cannot be offered a place or have the admission outcome status set to OFFER or COND-OFFER without creating a candidacy record and completing mandatory candidacy details. If a student program attempt is not created through the preenrollment process in Admissions, the same restrictions apply and the student program attempt cannot be confirmed without completing mandatory candidacy details.

Attendance Types

A program offering option has an attendance type attribute. The attendance types defined by an institution are maintained in the Program Attendance Types window. Each attendance type must have a research percentage defined as one of the attributes.

The following table describes sample research percentages for each attendance type.

Table 19–1 Sample Research Percentages

Attendance Type	Research Percentage
full time	100%
part time	50%

The default attendance percentage for a candidacy record is derived from the attendance type research percentage.

Minimum Submission Percentages

A research program offered by an institution must have a minimum submission percentage entered representing the minimum percentage of effective research days that must be completed before a thesis can be submitted. This field is defined in the Basic Program Details window.

The following table describes sample minimum submission percentages for each research program.

Table 19–2 Sample Minimum Submission Percentages

Program	Program Type	Effective Full Time Student Units, or FTE	Standard Full Time Completion	Minimum Submission Percentage	Earliest Submission in Effective Full-Time Days, or EFTD
Doctorate, Science	Higher Doctorate	3.000	30	50%	547.5
PhD, Science	Doctorate by Research	2.000	20	50%	365.0
Master's, Science	Master's by Research	1.000	10	50%	182.5

The minimum submission percentage calculates a candidate's minimum submission date.

Research Units

The Research subsystem requires unique research units to be set up for students in research-only programs or programs combining a research unit with course work units. The method used to derive Effective Full Time Student Units, or FTE, for research candidates enrolled in research units is different from the method used for students enrolled in non-research units.

Enrollment in a research unit means that teaching responsibility and income distribution to organizational units within the institution are derived from the candidate's supervision arrangements. For this reason, ownership in the Basic Unit Details window and teaching responsibility in the Teaching Responsibilities window should be allocated to a non-academic organizational unit, such as the Research Office, when unit details are entered.

A research unit should be established for each discipline and research level offered by an institution.

For example, if an institution offers research studies at four levels, Higher Doctorate, Ph.D., Master's, and Honors, for each discipline group offered by the institution, four research units are created, one for each research level. The unit codes indicate the research level with two letters, such as PD for Ph.D., and the

discipline group with four-digit discipline group classifications entered in the Disciplines window.

The following table describes sample unit codes and their descriptions.

Table 0–1 Sample Unit Codes

Unit Code	Description
HD0901	Higher Doctorate Research - Economics
PD0901	Ph.D. Research - Economics
MR0901	Master's Research - Economics
HN0901	Honors Research - Economics
HD0405	Higher Doctorate Research - Chemical Sciences
PD0405	Ph.D. Research - Chemical Sciences
MR0405	Master's Research - Chemical Sciences
HN0405	Honors Research - Chemical Sciences

These research units and related details are entered in the Basic Unit Details window.

All research units should be offered in all research teaching periods in order for a candidate's research to continue from one teaching period to the next. Create unit offerings in the Unit Offerings window, accessed from the Basic Unit Details window.

The grading schema for research units is assigned in the Unit Sections window, accessed from the Unit Offerings window.

Research Unit Attributes

Research units consist of the following attributes:

- Research Indicator

- Repeatable Indicator
- Enrolled Credit Points
- Achievable Credit Points
- Override Credit Points Indicator
- Override Title Indicator

Research Indicator

The Research indicator must be set for the unit to be classified as a research unit.

Repeatable Indicator

Setting the Repeatable indicator attributes the achievable credit points associated with a unit to a student's academic record each time the student passes the unit. If the Repeatable indicator is not set, the credit points are achievable one-time only, regardless of the number of times the unit is passed.

Enrolled Credit Points

This value calculates Effective Full-Time Student Units, or FTE, when a student enrolls in a unit in a non-research teaching period that does not calculate FTE using the research calculation method. Enrolled credit points ensure the unit enrollments are included in statistical reports to the government. If an institution configures calendars with research units offered in a SUM teaching period that uses the standard FTE calculation, an appropriate number of enrolled credit points should be entered.

Achievable Credit Points

Achievable credit points are the number of credit points awarded to a student upon successful completion of a unit. If no achievable credit points are entered, the system uses enrolled credit points. If zero achievable credit points are entered, no credit points are awarded upon completion of a unit. In the latter case, the institution can award a Satisfactory Progress grade at the end of a semester, rather than credit points, for a research unit.

Override Credit Points Indicator

This indicator overrides calculated research Effective Full Time Student Units, or FTE, or the enrolled or achievable credit points for a specified student unit attempt.

For example, if a full-time research student enrolls in a research unit for the teaching periods described in the following table, for the student unit attempt in the SUM teaching period, it is appropriate to override the credit points and use a lower credit

point value. The maximum FTE for this student is generated by the student unit attempts in the RES-1 and RES-2 teaching periods.

Table 19–3 Sample Teaching Periods Showing Override of Credit Points

Teaching Period	Load Calendar	Load Research Percentage	Effective Full Time Student Unit, or FTE, Calculation Method
RES-1	LOAD-CAL-1	50%	research calculation
RES-2	LOAD-CAL-2	50%	research calculation
SUM	LOAD-CAL-3	null	standard calculation

Override Title Indicator

Setting the Override Title indicator overrides the unit title for a student unit attempt. For example, if a student enrolls in the Honors Research > Chemical Sciences unit as part of a course work honors program, the user can override this title and make it Honors Minor Thesis > Chemical Sciences.

Unit Discontinuation

The Research subsystem requires unit discontinuation date aliases and administrative unit statuses to be created that allow withdrawal from research units without assessment penalties.

Research Grading Schema

Since research candidates are unlikely to complete their research and have their theses examined in a single teaching period, grading schema used in other areas of study are not appropriate for research units. An appropriate research grading schema should be established by Assessment and Research specialists using the Grading Schemas window.

The following table describes a sample research grading schema.

Table 19–4 Sample Research Grading Schema

Grade	Full Grade Name	System Result Type	Description
RC	Research Continuing	PASS	confers credits points entered in the Basic Unit Details window, as achievable credit points. Setting Repeatable indicator to Y confers credit each time student enrolls and achieves a grade linked to the system result type PASS. Note: Setting the Override Credit Points indicator provides additional flexibility.
UP	Unsatisfactory Progress	FAIL	typically awarded following review of candidate's research by a progress committee and possibly accompanied by an encumbrance to constrain or limit future enrollment
W	Withdrawn from Research	WITHDRAWN	typically awarded if candidate withdraws temporarily or permanently from program, with no academic penalty
RI	Research Incomplete	INCOMP	holding grade when research is incomplete and no credit is awarded Note: This grade is typically converted to either RC or UP following review by the progress committee.

Research Reference Data

For the Research subsystem to function correctly, reference data must be created and maintained using the following windows:

- Scholarship Types
- Research Supervisor Types
- Milestone Types
- Milestone Statuses
- Program Default Research Milestones
- Thesis Result Codes
- Thesis Panel Types
- Thesis Examination Types
- Thesis Panel Member Types

Note: To create some reference data in the Research subsystem, access to other reference data is required. For example, milestone types must be set up before program default milestones. Tracking types, linked to the system tracking types RES_TEX and RES_TPM, should be set up before thesis panel types or thesis panel member types if a tracking type is defined as an attribute of a thesis panel or thesis panel member type.

Tracking Types and Steps

Institution-defined tracking types and their associated steps are set up using the Tracking Types window.

The following table describes the two system tracking types in the Research subsystem. Each system tracking type is associated with a system step type and a default recipient.

Table 19–5 System Tracking Types, System Step Types, and Default Recipients in the Research Subsystem

System Tracking Type	System Step Type	Default Recipient
RES_TEX	RES_TEX_CH	chair of thesis panel
	RES_TEX_OR	originator of tracking item
	RES_TEX_PR	principal supervisor
	RES_TEX_ST	candidate (student)
RES_TPM	RES_TPM_OR	originator of tracking item

Table 19–5 System Tracking Types, System Step Types, and Default Recipients in the Research Subsystem

System Tracking Type	System Step Type	Default Recipient
	RES_TPM_PE	examiner

Tracking types used to track a thesis examination must be defined as system tracking type RES_TEX. Tracking types used to track a thesis panel member must be defined as system tracking type RES_TPM.

The system step types are used to define steps for the system tracking type if the default recipient is the appropriate recipient for a particular set of steps. A system step type does not have to be associated with each system tracking type step.

When tracking items are created for a thesis examination or panel member, the default recipient is inserted in the system tracking type steps associated with the system step types corresponding to that default recipient.

For example, the following table describes the steps to create a tracking item for a student. For this student, J. Gambetti, the principal supervisor is Prof. M. Drake, chair of the thesis panel is Dr. A. James, and the research staff member who originated the tracking item is J. Kelley.

Table 0–2 Sample Tracking Item Steps

Tracking Item Step	System Step Type	Default Recipient	Name of Recipient
contact principal supervisor	RES_TEX_PR	principal supervisor	Professor M. Drake
contact chair of examining panel	RES_TEX_CH	chair of thesis panel	Dr. A. James
receive nominated examiners	RES_TEX_OR	originator of tracking item	J. Kelley
notify student of outcomes	RES_TEX_ST	candidate (student)	J. Gambetti

Research Codes

Research codes allow government reporting of information related to research students. The three sets of government codes include:

- Type of Activity Classification Codes (TOA)
- Fields of Study (FOS)

- **Socio-Economic Objective Classifications (SEO)**

Institution-defined codes for Fields of Study and Socio-Economic Objective Classifications should be mapped to the corresponding government code.

The use of FOS and SEO codes is currently in transition from Department of Education, Training and Youth Affairs, or DETYA, codes to Australian Bureau of Statistics, or ABS, codes. Oracle Student System can use either set of codes.

Because of the transition, Fields of Study codes might need updating using the Government Fields of Study window. These codes now require an indicator to be set if the code is an ABS Research Fields, Programs and Disciplines Classification, or RFCD.

The following windows are related to research codes:

- Government Type of Activity Classification Codes
- Government Socio-Economic Objective Classifications
- Socio-Economic Objective Classifications
- Government Fields of Study
- Fields of Study

19.2 Research Candidacy

19.2.1 Setting Up Milestone Types IGSRE001

Milestones are used in the Research subsystem to mark a candidate's progress.

The Candidacy Milestones window sets up milestones for a research candidate. Default milestones for a program version are established in the Program Default Research Milestones window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Milestone Types windows

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–6 Milestone Types Window Description

Field Name	Type	Features	Description
Milestone Type	Required		Institution-defined milestone types used to describe milestones; for example, Six Monthly Report, Literature Review Report, Project Selection, Conference Presentation, Draft Thesis Available, Miscellaneous
Description	Optional	List of values	Description of the scholarship type
Closed	Optional	Check box	If selected, prevents further use of the record
Notification Days Region			
Imminent	Optional		Imminent days before the Milestone Due Date
Reminder	Optional		Reminder days after the Milestone Due Date If no value is entered in the Reminder field, a value cannot be entered in the Re-Reminder field.
Re-Reminder	Optional		Number of days after the milestone due date for re-reminders

19.2.2 Setting Up Research Supervisor Types IGSRE002

Research supervisor types, for example, Industry, Deputy, Ph.D., and Principal, classify each research candidate's supervisor. Research supervisor types set up in the Research Supervisor Types window are assigned to research supervisors in the Research Supervisors window. More than one supervisor can be assigned to a candidate.

The research supervisor types procedure sets up research supervisor types.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Research Supervisor Types > Research Supervisor Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–7 Research Supervisor Types Window Description

Field Name	Type	Features	Description
Research Supervisor Types	Required		Institution-defined supervisor type; for example, Principal Supervisor, Associate Supervisor, External Supervisor Note: A research supervisor type must have a unique name. Note: For each research supervisor type, only one principal supervisor can be selected.
Description	Required	List of values	Brief description of the research supervisor type
Principal Supervisor	Optional	Check box	If selected, indicates that the supervisor type represents a principal supervisor
Closed	Optional	Check box	If selected, prevents further use of the record

19.2.3 Setting Up Thesis Panel Types IGSRE003

Thesis panel types, for example, Smpanel and Fullpanel, classify thesis examination panels. An institution can have various thesis panel types depending on the research candidates undertake. Thesis panel types set up in the Thesis Panel Types window are assigned to thesis examination panels in the Thesis Details window. Recommended panel size and selection criteria for panel members are also specified.

A tracking type that corresponds to the system tracking type Res_Tex can also be assigned to a thesis panel type in the Thesis Panel Types window, to provide tracking steps for setting up a thesis examination panel.

Prerequisites

Tracking Types IGSTR001 (optional)

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Thesis Panel Types > Thesis Panel Types window.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–8 Thesis Panel Types Window Description

Field Name	Type	Features	Description
Thesis Panel Type	Required		Panel used for the thesis examination Note: Thesis Exam Type name must have a unique name.
Description	Required		Brief description of the thesis panel type
Closed	Optional	Check box	If selected, prevents further use of the record
Recommended Panel Size	Optional		Number indicating the recommended panel size to be used as a guide only
Selection Criteria	Optional		Enter selection criteria for panel members to be used as guide only Note: Data in this field does not validate any other data in the system
Tracking Type	Optional		Institution defined tracking type; for example, Undefined
Description	Display only		Brief description of the tracking type

19.2.4 Setting Up Thesis Examination Types IGSRE004

Thesis examination types, for example, Written, Perform, and Oral, indicate how an institution can examine a research candidate's thesis. Thesis examination types set up in the Thesis Examination Types window are assigned to each candidate's thesis examination in the Thesis Details window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Thesis Examination Types > Thesis Examination Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–9 Thesis Examination Types Window Description

Field Name	Type	Features	Description
Thesis Exam Type	Required		Examination type undertaken; For example, Written, Performance, Oral Note: Thesis Exam Type name must be unique.
Description	Required		Brief description of the thesis examination type Note: Users can modify the description after the Thesis Exam Type is set up.
Closed	Optional	Check box	If selected, prevents further use of the record

19.2.5 Setting Up Thesis Panel Member Types IGSRE005

Thesis panel member types, for example, Chair and Regular, classify panel members. Thesis panel member types set up in the Thesis Panel Member Types window are assigned to persons named to a thesis examination panel in the Thesis Details window. Only one panel member of type Chair can be named per thesis panel.

A tracking type that corresponds to the system tracking type Res-Tpm can also be assigned to a thesis panel member type in the Thesis Panel Member Types window, to provide tracking steps for interactions with a panel member.

Prerequisites

Tracking Types IGSTR001

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Thesis Panel Member Type > Thesis Panel Member Type window.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–10 Thesis Panel Member Types Window Description

Field Name	Type	Features	Description
Panel Member Type	Required		Panel member type
Description	Required		Brief description of the thesis panel member types Note: Users can modify the description after the Thesis Panel Member Type is set up.
Panel Chair	Optional	Check box	If selected, indicates that the thesis panel member type can be the chairperson of an examining panel
Closed	Optional	Check box	If selected, prevents further use of the record
Tracking Type	Optional		Institution defined tracking type; for example, Undefined
Description	Display only		Brief description of the tracking type

19.2.6 Setting Up Scholarship Types IGSRE006

Scholarship types classify scholarships awarded to students according to the organizational unit or person offering or supervising the scholarship. For research students, scholarship details are entered in the Record Scholarship Details window, accessed from the Research Candidacy Details window by clicking the **Scholarship** button.

Prerequisites

Person Details IGSPE034

Organizational Units IGSOR032

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Scholarship Types > Scholarship Types window.

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–11 Scholarship Types Window Description

Field Name	Type	Features	Description
Scholarship Type	Required		Is an institution-defined code to identify scholarship types; this code must be mapped either to an Organization Unit or to a Person ID Note: A research supervisor type must have a unique name. Note: For each research supervisor type, only one principal supervisor can be selected.
Description	Required	List of values	Brief description of the scholarship type
Closed	Optional	Check box	If selected, prevents further use of the record
Organization Unit Code		List of values	code of the organizational unit that offers or supervises the scholarship
Person Number		Icon	Person's number who offers or supervises the scholarship A person number cannot be selected if an organizational unit code is already selected.
Find Person		Icon	Opens Find Person window for users to query for person ID by other person criteria

19.2.7 Setting Up Thesis Result Codes IGSRE007

A thesis result code represents an assessment of a thesis in Oracle Student System. Thesis assessments, entered in the Thesis Details window, include the thesis panel member's recommended result, the thesis exam result, and the final thesis result.

System-defined thesis result codes include Major Revisions Required, Minor Revisions Required, No Result Recorded, Thesis Failed, Thesis Failed > Alternative Exit Offered, and Thesis Passed.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Thesis Result Codes > Thesis Result Codes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–12 Thesis Result Codes Window Description

Field Name	Type	Features	Description
Thesis Result Code	Required		<p>Institution-defined thesis result code</p> <p>Note: A thesis result code must have a unique name</p> <p>Note: Each institution-defined thesis result code must map to a system-defined thesis result code.</p> <p>Note: System-defined thesis result codes can also be used for institution-defined thesis result codes.</p> <p>Note: In the System Thesis Result Code List of values, each thesis result code is assigned a final result indicator. Two of the thesis result codes, Minor Revisions Required and Major Revisions Required, have their final result indicators set to No to allow for revision and resubmission of a thesis.</p>
Description	Required		Brief description of the thesis result code
Closed	Optional	Check box	If selected, prevents further use of the record
Comments	Optional		Description of the thesis result code

19.2.8 Setting Up Government Socio-Economic Classifications IGSRE008

Government socio-economic objective classification codes are set up in the Government Socio-Economic Objective Classifications window.

Institution-defined socio-economic objective classification codes are entered in the Research Candidacy Details window.

Prerequisites

None

Responsibility
Oracle Student System Super User

Navigation
Enrollments > Research > Setups > Government Socio-Economic window

Steps
Enter data in each field of the window as described in the table. Save your work.

Table 19–13 Government Socio-Economic Objective Classifications Window Description

Field Name	Type	Features	Description
Government Research Code	Required	List of values	Government research code Note: If a government socio-economic objective classification code is mapped to an institution-defined socio-economic objective classification code, it cannot be deleted. Note: A government socio-economic objective classification code must have a unique name.
Description	Required	List of values	Government research code description
Government Indicator	Optional	Check box	If selected, indicates that the objective classification code is a government socio-economic objective classification code
Closed	Optional	Check box	If selected, prevents further use of the record
Research Codes	Optional	Button	Opens the research codes window

19.2.9 Setting Up Socio-Economic Classifications IGSRE009

Socio-economic objective classification codes are used by institutions that are required to report information to the government about the research performed in the institution. Socio-economic objective classification codes classify research according to the social and economic objectives of the research.

Institution-defined socio-economic objective classification codes are entered in the Research Candidacy Details window.

Prerequisites
Government Socio-Economic Objective Classifications IGSRE008

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Research Candidacy Details window

Query the appropriate record.

Click **Research Codes**.

Steps

1. In the Socio-Economic Classification region, enter a code from the list of values.
2. Set a percentage in the Percentage field.
3. Save your work.

19.2.10 Setting Up Government Activity Classification Codes IGSRE010

Government type of activity codes, entered in the Research Candidacy Details window, are used when entering statistics about research projects in Oracle Student System and reporting these statistics to the government.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Program Structure and Planning > Faculty > Faculty Task Types > Faculty Task Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–14 Government Type of Activity Classification Codes Window Description

Field Name	Type	Features	Description
Government Type of Activity Code	Required		Code used for recording and reporting statistics about research projects to government
Description	Required		Brief description of the thesis result code
Closed	Optional	Check box	If selected, prevents further use of the record

19.2.11 Setting Up Milestone Statuses IGSRE011

The milestone status allows institutions to mark significant achievements as candidates progress toward completion. Users must map their own milestone statuses to the system-defined statuses.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Milestone Statuses > Milestone Statuses window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–15 Milestone Statuses Window Description

Field Name	Type	Features	Description
Milestone Status	Required		Milestone status Note: A Milestone Status must have a unique name. Note: Each institution-defined milestone status must map to a system-defined milestone status
Description	Required		Brief description of the milestone status
System Milestone Status	Required		System milestone status
Closed	Optional	Check box	If selected, prevents further use of the record

19.3 Setting Up Research Milestones IGSRE014

A standard set of milestones can be created for a program version using the Program Default Research Milestones window. This set of program default milestones can then be used when establishing milestones for an individual candidate using the Candidacy Milestones window.

The program default research milestones procedure records a set of default milestones as part of the program version details.

The Program Default Research Milestones window can be accessed through the Basic Program Details window or directly from menu.

The following information applies:

- A Closed milestone type cannot be entered.
- Exact duplicates, such as Milestone Type and number of Offset Days, cannot be created in a set.
- Deleting any milestone from this set of program default research milestones will not affect existing candidate's milestones.
- The Offset Days value is used to calculate the Due Date for this default milestone when used as a Candidacy Milestones window. It describes the number of days the milestone will be offset from the Candidate Commencement Date.

Prerequisites

Program Attendance Type IGSPS006

Basic Program Details IGSPS013

Programs must be set to ACTIVE status.

Milestone Types IGSRE001

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Default Research Milestones window

Steps

1. Query to retrieve the Required program version details.

Note: If opened in the Basic Program Details window, the program version details from that window are displayed.

2. Enter data in appropriate fields or query the appropriate record.

Note: Attendance types cannot be added or deleted in this window.

3. In the Default Research Milestone Set region, enter a valid institution-defined milestone type from the Milestone Types window, and a value in the Offset Days field.
4. Save your work.

19.3.1 Research Calendar Configuration IGSRE012

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Enrollments > Research > Setups > Configure Research Calendar > Research Calendar Configuration window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 19–16 Research Calendar Configuration Window Description

Field Name	Type	Features	Description
Effective Start Date	Required	List of values	Research calendar start date Note: The List of values includes date aliases, set up in the Date Aliases window, that the institution uses to represent effective start dates for a research teaching period. Note: Closed date aliases cannot be selected.
Effective End Date	Required	List of values	Research calendar end date Note: The List of values includes date aliases, set up in the Date Aliases window, that the institution uses to represent effective end dates for a research teaching period. Note: Closed date aliases cannot be selected.

20.1 Financial Aid Overview

Oracle Student System Financial Aid manages student financial aid programs for higher education.

20.2 Financial Aid Profile Options

Set up the following Financial Aid profile option:

- IGS: Participate in US Financial Aid Programs

Refer to Appendix A for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

20.3 Financial Aid Options

The following section is necessary to support participation in federal financial aid programs and import of ISIR and PROFILE records.

20.3.1 Setting Up Financial Aid Office IGFAP017

The Financial Aid Office procedure enables users to enter static details relating to the financial aid office.

Prerequisites

Organizational units IGSOR030

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Financial Aid Office > Financial Aid Office window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–1 Financial Aid Office Window Description

Field Name	Type	Features	Description
Office ID	Display only		Financial aid office ID
Name	Required		Financial aid office ID name
Org Unit Code	Required	List of values	Organizational unit code
Description	Display only		Organizational unit code description
OPE ID	Optional	List of values	U.S. Department of Education Office of Postsecondary Education Identifier (OPEID)
PELL ID	Optional	List of values	Six digit number as an identification number for the Federal Pell Grant Program
DUNS ID	Optional	List of values	DUNS identifier; a nine digit Data Universal Numbering System (DUNS) identifier issued to the institution by the Dun & Bradstreet Corporation which is used by the institution in electronic commerce with various federal agencies
CSS ID	Optional	List of values	College Board identifier
State Agency ID	Optional	List of values	State agency identifier
Campus Based	Optional	List of values	U.S. Department of Education Campus Based Aid identifier
Central Registry Service	Optional	List of values	This field should not be used

Table 20–1 Financial Aid Office Window Description

Field Name	Type	Features	Description
ETI Destination Code	Required		TG number designated by Title IV Wide Area Net work
FSEOG Match Method	Optional	Drop-down list	FSEOG match method; Fund Specific, Individual Matching, Aggregate Matching
FSEOG Contribution	Optional		Percentage of FSEOG contribution
GPA/Hours Default Type	Optional		GPA/hours default type
FESOG Waiver	Optional	Check box	If selected, indicates whether Federal Supplemental Opportunity Grant matching is waived for the school
Experimental	Optional	Check box	If selected, indicates whether school is an experimental site for the U.S. Department of Education
Low Value	Optional	Check box	If selected, indicates if a school is low value tuition school for use of the Federal Pell Grant Alternate Schedule
QA School	Optional	Check box	If selected, indicates if a school is participant in the Quality Assurance Program of the U.S. Department of Education

20.3.2 Setting Up System Award Year Mapping IGFAP018

The System Award Year Mappings procedure enables users to map the batch year code defined in the CPS record to system award year, calendar award year, and CSS PROFILE batch year. Users also map the Federal Pell Grant, ISIR and PROFILE file versions to the system award year.

A one-to-one mapping exists between the ISIR batch year and CSS PROFILE academic year.

Note: Academic Year mappings are now performed in the Calendar functionality by linking Load Calendars directly to Award Year. Admission Year mapping is determined by Admission module default Admission year logic.

This allows one load calendar to be mapped to multiple award years.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > System Award Year Mappings window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–2 System Award Year Mappings Window Description

Field Name	Type	Features	Description
Award Year Region			
System	Required	List of values	System Award Year which determines Federal Award Year specific characteristics
Calendar	Required	List of values	Calendar award years
Start Date	Required		Populated by selecting a calendar
End Date	Required		Populated by selecting a calendar
ISIR Batch Year	Required		Year for ISIR Batch Note: Valid entries include numbers 0 - 9.
PROFILE Year	Required		Year for PROFILE Note: Valid entries include numbers 0 - 9.
File Specifications Region			
Pell Version	Required	List of values	PELL file layouts version
PROFILE Version	Required	List of values	PROFILE file layouts version
ISIR Version	Required	List of values	ISIR file layouts version

20.3.3 Setting Up Record Matching Criteria IGFAP023

The Record Matching Criteria procedure enables users to set up matching criteria for the person matching process.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Record Matching Criteria > Record Matching Criteria window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–3 Record Matching Criteria Window Description

Field Name	Type	Features	Description
SSN Match Weight	Required		Social Security number record matching weight Note: The valid match weight is between 0 and 5.
Given Name Match Weight	Required		Name matching weight Note: The valid match weight for Given Name is between 0 and 5.
Surname Match Weight	Required		Surname matching weight Note: The valid match weight for Surname is between 0 and 5.
Date of Birth Match Weight	Required		Date of birth matching weight Note: The valid match weight for Date of Birth is between 0 and 5.
Street Address Match Weight	Required		Address matching weight Note: The valid match weight for SSN, Given Name, Surname, Date of Birth, Street Address is between 0 and 5.
City Match Weight	Required		City matching weight Note: The valid match weight for City is between 0 and 5.

Table 20–3 Record Matching Criteria Window Description

Field Name	Type	Features	Description
Postal Code Match Weight	Required		Postal code matching weight Note: The valid match weight for Postal Code is between 0 and 5.
Score Region			
Minimum Score for Automatic Creation of FA Base Record	Required		Minimum score for automatic creation of Financial Aid Base record Note: The valid minimum score for Automatic Creation of FA Base Record is between 0 and 35.
Minimum Score for Manual Review to Create FA Base Record	Required		Minimum score for manual review to create Financial Aid Base record Note: The valid score Manual Review to Create FA Base Record is between 0 and 35.

20.3.4 Setting Up Application Processing Import Parameters IGFAP002

The Application Processing Parameters procedure enables users to import data and define conditions for entering data in Financial Aid.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Application Processing Parameters window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–4 Application Processing Parameters Window Description

Field Name	Type	Features	Description
Enable Workflow	Optional	Check box	If selected, indicates that workflow is enabled for the system

Table 20–4 Application Processing Parameters Window Description

Field Name	Type	Features	Description
SSN Required for Base Record Creation	Optional	Check box	If selected, indicates that social security number is required for base record creation
Manual Review of Application	Optional	Check box	If selected, indicates that users manually review application to update the Application Process Status to Application Complete

20.3.5 Setting Up Data Change Workflow Attribute IGFAP031

The data workflow attribute procedure enables users to set up data elements for the workflow notification when the data element's value changes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Data Change Workflow Attribute > Data Change Workflow Attribute window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–5 Data Change Workflow Attribute Window Description

Field Name	Type	Features	Description
Data Attributes	Required	List of values	Data attributes
Include in Workflow	Optional	Check box	If selected, enables workflow notification if any change in the value of the selected data attribute

20.3.6 Setting Up Institutional Applications IGFAP010

The Institutional Application Setup procedure enables users to define questions for institutions. These questions are institution-specific.

An institutional application is a pre-defined Financial Aid application for schools, that gets automatically assigned to students. Users can assign only one institutional application for a student in a processing year.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Institutional Application > Institutional Application window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–6 Institutional Application Setup Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Award year
Effective Dates	Display only		Effective start and end dates

Questions Region

[Data Coordination Check Box]	Optional	Check box	If selected, data in the Questions region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Question field in the Questions region. Leave deselected to speed up performance when querying records.
Question	Required		Questions to set up institutional applications
Enabled	Optional	Check box	If selected, the question will be displayed for the selected award year

20.3.7 Setting Up External Term Mapping IGFAW020

The external term mapping procedure enables users to map external terms to the terms within Oracle Student System. When external awards are uploaded into the system, users must identify the disbursement schedule for these external awards.

The information specified here is used in the Awards > Retrieve and Load External Award File concurrent request. The external terms specified in the flat file have to be mapped to system terms. This mapping is retrieved from the external term mapping setup.

Prerequisites

Calendar Instance Relationships IGSCA004

Load Calendar IGSCA004

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > External Term Mapping > External Term Mapping window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–7 External Term Mapping Window Description

Field Name	Type	Features	Description
External Terms Region			
External Term	Required		External term loaded into the system in the Award > Retrieve and Load External Awards File process
System Term	Required		System term to which the external term maps
Active	Optional	Check box	If selected, indicates that the external term is active

20.4 To Do Item Tracking

Students may be assigned To Do Items (specific actions or documents required) in order to complete the Financial Aid process. One way that students are identified as

needing To Do Items for follow-up is by the use of external query tools against the Student/Financial Aid Base Record database for creation of Person ID Groups. These Person ID Groups can then be used as parameters in assigning To Do Items to students. There are also other Financial Processes that may assign To Do Items to a student.

Verification To Do Items work in the same manner as other To Do Items except that they also identify elements of the ISIR that require verification and populate the Federal Verification Worksheet. Data elements are entered and compared with the Active ISIR record. All discrepancies between ISIR data being verified and the documented values entered into the Federal Verification Worksheet will be sent as corrections to the U.S. Department of Education’s Central Processor for generation of a corrected ISIR.

20.4.1 Setting Up To Do Items IGFAP027

The To Do Items procedure defines To Do Items to be used in Financial Aid. The To Do Items procedure enables users to create a master list of To Do list items that can be assigned to a student’s Track To Do List.

Prerequisites

Calendar Types IGSCA002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > To Do Items window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–8 To Do Items Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Award year
Effective Dates	display only		Effective start and end dates

To Do Item
List Region

Table 20–8 To Do Items Window Description

Field Name	Type	Features	Description
[Data Coordination Check box]	Optional	Check box	If selected, data in the To Do Item List region is automatically refreshed and coordinated with data in the header region. If deselected, data is refreshed only on navigation to the Item Code field in the To Do Item List region. Leave deselected to speed up performance when querying records.
Item code	Required		Item code
Description	Required		Item code description
Max. Attempts	Optional		Maximum number of times to request a To Do Item via correspondence
Attempt frequency Days	Optional		How frequently a To Do Item will be requested via correspondence
Career Item	Optional	Check box	If selected, the record is a career item and it needs to be verified only once in the student's career. For example, proof for date of birth.
Required for Completion	Optional	Check box	If selected, indicates that the To Do item is required to be complete before the students Financial Aid process status can be changed to Application Complete.
Correspondence Text	Optional		Text that will be used for that item when sending To Do Item Correspondence

20.4.2 Financial Aid Lookup Values for To Do Item Details

You must define financial aid lookup codes to use the optional To Do Item Details functionality.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setups > Lookups

Steps

1. In the Type field, enter IGF_AP_INC_REASON. This lookup is required to support recording To Do Item Incomplete Reasons.
2. Enter user-defined codes.
3. Save your work.
4. In the Type field, enter IGF_AP_REQ_CODE. This lookup is required to support recording To Do Item Requirement Codes.
5. Enter user-defined codes.
6. Save and proceed.

20.5 Pell

The Federal Pell Grant program provides funding for high-need, undergraduate students. The sum awarded is determined by the U.S. Department of Education based on the student's cost of attendance, expected family contribution and enrollment status.

Institutions must ensure that each recipient meets the eligibility requirements for the Federal Pell Grant Program, and that payment is made to eligible students.

The Common Origination and Disbursement (COD) System requires that institutions originate Federal Pell Grants prior to disbursement. The electronic processing of COD is similar to the Federal Direct Loan Program.

The remaining functionality is usually reserved for Pell Grant processing specialists or system administrators who set up and maintain the subsystem.

The Pell Grant Processing manages the processing of a Pell Grant award for an undergraduate student and includes the following:

- entering and maintaining Pell Grant setup related reference data
- managing disbursement related dates
- defining origination processes
- managing data requests
- managing Common Origination and Disbursement (COD) System processes

- managing funding methods in the Federal Pell Grant Program

20.5.1 Pell Origination

Origination is the process of reporting a Pell Grant award to COD. Origination can occur before or at the same time as the initial disbursement. The majority of data transmitted to COD through the Pell Origination process is established in Pell Setup. The remaining data is taken from the Pell Grant base record.

The origination record establishes a student's eligibility and the amount of Federal Pell Grant funding the student can receive for the award year. A school must submit an origination record for every Federal Pell Grant recipient.

The following procedures are related to Pell origination:

- Acknowledgement of an Origination Record
- Updating an Origination Record

Acknowledgement of an Origination Record

An acknowledgement is returned to the school for every origination record sent to COD. The acknowledgement confirms receipt of the record and indicates the record status in COD. The acknowledgement includes the following:

- origination record status
- values accepted by RFMS during processing
- edit and comment codes to indicate rejection
- data corrections
- warning messages

The origination acknowledgment also includes the authorized scheduled federal Pell Grant award for the recipient at the institution.

Updating an Origination Record

Users can update origination data by resubmitting the record with the relevant changes. For example, an origination record can be updated if there are changes to the student's data that affect the amount of the award or if COD sets values that users want to change.

Note: Users should review and update the origination record, if appropriate, when the acknowledgement record is received. COD uses the origination award amounts to verify disbursement requests.

20.5.2 Setting Up Pell Setup IGFR003

The Pell setup procedure establishes certain fields in the COD Pell Origination that are not student-specific. These default values are entered by users each year during regulatory setup.

The Pell setup window displays the Pell defaults for a particular reporting Pell ID. Data from the Pell setup is used in the creation of Pell origination files. The Pell record created for each Pell eligible student is batched and sent as origination files for processing. After the reporting Pell ID is entered, default Pell setup can take place.

The Pell Setup window enables users to set the following defaults for the Pell origination file:

- reporting Pell ID
- low tuition and fees code
- alternate schedule factors which determines if low tuition code is applicable
- academic calendar
- payment method
- weeks of instructional time used to calculate payment
- weeks of institution time in program's definition of academic year
- credit or clock hours in all payment periods expected to complete the current school year

Prerequisites

Award Year IGSCA002

Financial Aid Office IGFA017

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Pell Grant Processing > Pell Setup window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–9 Pell Setup Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Calendar Award Year for which Pell setup is applicable
Reporting Pell ID	Required	List of values	School identifier for Pell Grant processing from Financial Aid Office setup
Effective Dates	Default		Award Year Period
Attend Campus ID	Optional		Pell ID of attending campus; change creates new origination record
Branch Campus	Optional	Check box	Check if attended campus is a branch campus
Academic Region			
Calendar	Required	List of values	Federal Pell Grant Academic Calendar Type
Weeks	Optional		Total number of weeks of instructional time in the institution's academic year
Hours	Optional		Total number of credit or clock hours in the institution's academic year
Payment Region			
Method	Required	List of values	Payment methodology for award year
Weeks	Optional		Number of weeks of instructional time; used to calculate payment for a particular period
Expected Hours	Optional		Total number of credit or clock hours the institution expects a student to complete and be paid for during the current Federal Pell Grant award year
Alternate Schedule Limits Region			

Table 20–9 Pell Setup Window Description

Field Name	Type	Features	Description
Expenses	Required		Maximum amount of Pell Alternate Expenses that is required for Alternate Schedule
Cost of Attendance	Required		Minimum amount of Cost of Attendance that is required for using Alternate Schedule
Family Contribution	Required		Maximum amount of Family Contribution amount that is required for Alternate using Schedule
Funding Method			
Advance	Optional	Radio button	Select if institution is a Advance Payment method school
Just In Time	Optional	Radio button	Select if school is a Just In Time payment method school

20.5.3 Setting Up Pell Regular Schedule IGFR006

The Pell Regular Schedule window is used to enter the Pell award schedule that is released by the government.

Prerequisites

Calendar Types IGSCA002

Award year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Pell Grant Processing > Pell Regular Schedule window

Steps

Note: Data should be entered using the Pell Payment Schedule provided by the Department of Education.

1. In the Award Year field, select an available award year from the List of values.

Depending on the award year selected, the Effective Dates field is automatically populated.

2. In the Enrollment Status field, select an enrollment status from the List of values.
3. In the Cost of Attendance Range field, enter the start and end range of the COA amount.
4. In the Expected Family Contribution fields, enter the start and end range of the expected family contribution (EFC) amounts.

Note: The end range amount must be greater than the start range amount.

5. In the Amount field, enter the amount of the Pell Grant.
6. Save your work.

Table 20–10 Pell Setup Matrix Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Calendar Award Year for which Pell setup is applicable
Effective Dates	Default		Award Year Period
Enrollment Status	Required	List of values	Student's expected enrollment status for the entire award year
Cost of Attendance Range	Required		Minimum and maximum values of cost of attendance range value obtained from the Pell Payment schedule
Expected Family Contribution Values			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Pell Setup Matrix Window is automatically refreshed and coordinated with data in the parent window; if deselected, data in the Pell Setup Matrix Window is refreshed only when the user clicks in the Expected Family Contribution region. Leave deselected to speed up performance when querying records.
Range Start	Required		Minimum expected family contribution value

Table 20–10 Pell Setup Matrix Window Description

Field Name	Type	Features	Description
Range End	Required		Maximum expected family contribution value
Amount	Required		Pell Award amount

20.5.4 Setting Up Pell Alternate Schedule IGFG008

The Pell Alternate Schedule procedure enables users to determine the pell award, if a school is a low tuition school.

The Pell Alternate Schedule window enables users to setup the alternate Pell schedule.

Prerequisites

Calendar Types IGSCA002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Pell Grant Processing > Federal Pell Alternate Schedule window

Steps

1. In the Award Year field, select an available award year from the List of values.
Depending on the award year selected, the Effective Dates field is automatically populated.
2. In the Enrollment Status field, select an enrollment status from the List of values.
3. In the Cost of Attendance Range field, enter the start and end range of the COA amount.
4. In the Alternate Schedule Expenses region, enter the start and end range of the alternate schedule expenses amounts.
5. In the Expected Family Contribution region, enter the start and end range of the expected family contribution (EFC) amounts.

6. In the Pell Amount field, enter the amount of the Pell Grant.

7. Save your work.

Table 20–11 Federal Pell Alternate Schedule Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Calendar Award Year for which Pell setup is applicable
Effective Dates	Default		Award Year Period
Enrollment Status	Required	List of values	Student's expected enrollment status for the entire award year
Cost of Attendance Range	Required		Minimum and maximum values of cost of attendance range
Alternate Schedule Expenses			
[Data Coordination Check Box]	Optional	Check box	If selected, data in the Federal Pell Alternate Schedule Window is automatically refreshed and coordinated with data in the parent window; if deselected, data in the Federal Pell Alternate Schedule Window is refreshed only when the user clicks in the Alternate Schedule Expenses region. Leave deselected to speed up performance when querying records.
Range Start	Optional		Minimum alternate schedule expense amount
Range End	Optional		Maximum alternate schedule expense amount; end range amount must be greater than the start range amount
Expected Family Contribution			
Range Start	Required		Minimum expected family contribution value

Table 20–11 Federal Pell Alternate Schedule Window Description

Field Name	Type	Features	Description
Range End	Required		Maximum expected family contribution value; end range amount must be greater than the start range amount
Pell Amount	Required		Pell Award amount

Guidelines

Data should be entered using the Alternate Pell Payment Schedule provided by the Department of Education.

Note: .99 should be added to each of the Range End amounts. If not, there are holes in the value sequence which fall on the range boundaries.

For example, the values between 100.01 to 100.99 get lost between 1 to 100 and 101 to 200.

Therefore the beginning and ending values for the first three ranges should be:

- 0.00 to 0.99
- 1.00 to 100.99
- 101.00 to 200.99

Use 0 to 0.99 as the start and end values in the first range and add .99 to each of the range end values in the list.

20.5.5 Setting Up Low Tuition and Fees Codes IGFG009

The window addresses functionality that is required to accurately process Pell Origination record.

Amounts you must input into this window are obtained from the Pell Alternate Schedule published annually by the Department of Education.

The Low Tuition and Fees Code window must be set up prior to Create Pell Records process for the procedure to accurately process Pell Origination records. This is only required for schools using the Pell Alternate Schedule.

Prerequisites

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid->Setup >Pell Grant Processing > Low Tuition and Fees Code

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–12 Low Tuition and Fees Codes Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Valid values include any active award year
Effective Dates	Required	Display only	Start and end effective dates of the award year
Code	Required	List of values	Low tuition fees and code value defined by the US Department of Education You must enter either a numeric or alphabetical value.
Range Start	Required	List of values	Beginning value of low tuition fees and code value defined by the US Department of Education You must enter a numeric value.
Range End	Required	List of values	Ending value of low tuition fees and code value defined by the US Department of Education You must enter a numeric value.

20.5.6 Setting Up Financial Aid Attendance Type Mapping IGFAP032

The Financial Aid attendance type mapping procedure enables users to map the program attendance types defined in Student System to the Financial Aid attendance types.

Prerequisites

Program Attendance Types IGSPS006

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Application Processing > Enrollment > Financial Aid Attendance Types window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–13 Financial Aid Attendance Types Window Description

Field Name	Type	Features	Description
Award Year	Display only		Award year
Effective Dates	Display only		Effective dates

**Student
System
Attendance
Types
Region**

Attendance Type	Display only		Attendance type
Description	Display only		Attendance type description
Government Attendance Type	Display only		Government attendance type
Closed	Display only		Indicator of whether context Attendance Type is Closed

**Academic
Period Load
Range
Region**

Lower Load Limit	Display only		Lower load limit
Upper Load Limit	Display only		Upper load limit
Research	Display only		Academic period load range research

Table 20–13 Financial Aid Attendance Types Window Description

Field Name	Type	Features	Description
Financial Aid Attendance Types Region			
Pell Grant	Required	List of values	Pell Grant attendance types; for example full-time, three-quarter time, half-time, less than half-time
Pell Grant Code	Display only		Code used for Federal Pell Grant origination
FFELP	Required	List of values	FFELP attendance types
FFELP Code	Display only		Code used for FFELP loan origination
Application Processing	Required	List of values	General application processing attendance types
Application Processing Code	Display only		Code used for application processing attendance type

20.6 FFELP and Alternative Loans

The Federal Family Education Loan Program (FFELP) enables students to borrow government-insured loans from private lenders, such as banks, via various loan guarantors and loan servicers. Alternative Loans are also provided by private lenders to supplement the student loan programs available from the federal and state governments. Oracle Student System uses the CommonLine 5 standard for transmission of FFELP and Alternative Loan data. The following loans are processed using the CommonLine 5 standard:

- Federal Stafford Subsidized Loans
- Federal Stafford Unsubsidized Loans
- Federal PLUS loans
- Alternative Loans

Federal Stafford Subsidized Loans

Subsidized Loans are based on need. Interest on these loans is paid by the federal government while the student is in school. The grace period starts the day after a student ceases to be enrolled at least half time at an eligible institution and during

this time, the student is not required to make any payments and is not charged interest. The duration of the grace period is six months but can be longer if the student is in active military duty.

Federal Stafford Unsubsidized Loans

Federal Direct Unsubsidized loans are not need based and can be used to replace the expected family contribution (EFC). While the student is in school, the student can elect to pay the interest. If the student does not elect to pay the interest, the interest is capitalized, resulting in a higher loan amount.

Federal PLUS loans

A federal direct PLUS loan is available to eligible parents. A federal direct PLUS loan borrower must be creditworthy or obtain a creditworthy endorser on the loan. The student's parent is responsible for repaying the lender. Payment to the lender includes interest accrued on the loan from the time the loan is disbursed until it is fully repaid. Federal direct PLUS loans can be requested from the school.

Alternative Loans

Alternative loans are provided by private lenders to supplement the student loan programs available from the federal and state governments.

20.6.1 Setting Up Lender Codes IGFSL001

The Lender Codes window maintains the lender IDs and the lender non-ED branch IDs. Some loans in the school are processed with help of lenders who provide funds and servicing for student loans. The student's eligibility, award amount, and expected dates of disbursement details are indicated to the lender.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Lender Codes Setup window

Steps

1. In the Lender ID field, enter a unique lender code.
2. In the Description field, enter a brief description about the lender.

3. In the DUNS ID field, enter the lender ID assigned by the DUNS.
4. Optionally, select or deselect Active to specify a lender's status.
5. Optionally, to enter the lender non-ED branch details, in the Lender Non-ED Branch Details region, select the check box.
6. In the Branch ID field, enter a unique branch ID.
7. In the Description field, enter a brief description about the branch.
8. If the branch is active, select Active.
9. Save your work.
10. Close the window.

20.6.2 Setting Up Guarantor Codes IGFSL002

The Guarantor Codes window maintains the guarantor's details. FFELP loans are processed with the help of lenders and Guarantee agencies. A Stafford loan and PLUS loan is given to the student or parent by a bank and the loan is guaranteed by a guarantor approved by the U.S. Department of Education. Some guarantors are also lenders. In the FFELP CommonLine process, the application send record should be originated with a lender and guaranteed by a guarantor. If the originator and the guarantor authority is not the same, or do not have an agreement to process records together, the lender can return a response file with the origination. The guarantor can send a second response file with the guarantee data.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Guarantor Codes Setup window

Steps

1. In the Guarantor ID field, enter a unique lender code.
2. In the Description field, enter a brief description about the guarantor.
3. In the DUNS ID field, enter the lender ID assigned by the DUNS.

4. Optionally, select or deselect Active to specify a guarantor's status.

20.6.3 Setting Up Servicer Codes IGFSL010

The Servicer Codes window maintains the servicer IDs and the servicer non-ED branch IDs.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Servicer Codes Setup window

Steps

1. In the Servicer ID field, enter a unique servicer code.
2. In the Description field, enter a brief description about the servicer.
3. In the DUNS ID field, enter the servicer ID assigned by the DUNS.
4. Optionally, select or deselect Active to specify a servicer's status.
5. Optionally, to enter the servicer non-ED branch details, select the check box in Servicer Non -ED Branch Details region.
6. If the branch is active, select Active.
7. Save your work.

20.6.4 Setting Up Lender Relationships IGFSL011

The Lender Relationships window maintains the lender, guarantor, and recipient relationships. The relationship between the lender, guarantor, and servicer can vary from lender to lender. A lender can have loans guaranteed by multiple guarantee agencies or the guarantee agency can guarantee loans for several lenders. Establishing the relationships defines the loan process among the lender, servicer, and guarantor.

The following information applies to this procedure:

- Lender ID, Lender Non-ED Branch ID, Guarantor ID, Recipient ID, Recipient Non-ED Branch ID must be a unique combination.

- If the lender does not have any branches, then lender non-ED branch ID details cannot be entered.
- Users can select the lender from the list that shows all the lenders and their branch details. Users can select any lender from this list and associate a guarantor and recipient to this lender.

Prerequisites

Lender Codes IGFSL001

Guarantor Codes IGFSL002

Servicer Codes IGFSL010

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Lender Relationships > Lender Relationships window

1. In the Lender ID field, select a unique ID from the List of values.
Depending on the lender ID selected, the Description, DUNS ID, and Non-ED Branch ID fields are automatically populated.
2. If the Lender is active, select the Active check box.
3. In the Guarantor ID field, select an ID of the Guarantor for the Lender from the List of values.
Depending on the Guarantor ID selected, the DUNS ID field is automatically populated.
4. In the Recipient ID field, select a recipient ID for this lender from the List of values.
Depending on the recipient selected, the DUNS ID and Non-ED Branch ID fields are automatically populated.
5. Save your work.

20.6.5 Setting Up FFELP Setup IGFSL004

The FFELP Setup window maintains the FFELP loan setup details. The FFELP electronic process enables schools to originate loans and receive funds for loans electronically.

Prerequisites

Lender relationships

Calendar Types IGSCA002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > FFELP > FFELP Setup > FFELP Setup window

Steps

Source/Recipient Tab

1. Select Award Year
2. Select File Specification
3. Select Lender ID
4. Enter FFELP Origination Fee for Lender ID
5. Enter FFELP Guarantee Fee for Lender ID
6. Enter Alternative Loans Origination Fee for Lender ID
7. Enter Alternative Loans Guarantee Fee for Lender ID

Application Tab

1. Select Processing Type for Lender ID
2. Select Requested Serial Loan option or New MPN option for Lender ID
3. Select Loan Award Method for Lender ID
4. Select Promissory Note Method for Lender ID
5. Select Media Type for Lender ID

6. If borrowers intend to pay interest on loans from this Lender ID while in school, select the Borrower Interest Indicator check box.
7. Optionally, to indicate for this Lender ID to hold the disbursement of funds until notified by the institution, select the Hold Indicator check box.
8. Optionally, select the EFT Authorization check box for this Lender ID.
This permits the lender to electronically send the funds to the school, based on the student's authorization.
9. Optionally, select the Automatic Fund Late Disbursements check box for this Lender ID. This allows the system to accept funds that are coded as late disbursement from the lender.
10. Save your work.

Note: There can be only one setup record per year.

20.7 Setting Up Direct Loans Setup IGFSL003

The Direct Loan Setup window maintains details of the Federal Direct Loan. This includes Origination Fee, Promissory note, and Disbursement details. The Federal Direct loan program provides students with the ability to borrow directly from the U.S. Department of Education.

The following loans are processed under federal direct loans:

- Federal Direct Stafford Subsidized Loans
- Federal Direct Stafford Unsubsidized Loans
- Federal Direct PLUS loans

Prerequisites

Calendar Types IGSCA002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > Direct Loan Setup > Direct Loan Setup window

Steps

1. Select Award Year
2. Enter Direct Loan School ID
3. Select Direct Loan File Specification
4. Enter Direct Stafford Loan Origination Fee Percentage
5. Enter Direct PLUS Loan Origination Fee Percentage
6. Enter Direct Loan Interest Rate Rebate Percentage
7. Select Print Location of the Promissory Note
8. Enter number of copies of promissory note to be printed
9. If LOC is printing the disclosure statement, select the LOC prints Disclosure check box.
10. If affirmation is required, select the Affirmation Required check box.
11. If an entrance interview is required, select the Interview Required check box.
12. If an institution is designated as a special school, select the Special School check box.
13. Save your work.

Note: There can be only one setup record per year.

20.8 Stafford Loan Limits

The federal stafford loan limits procedure enables users to set up limits for federal stafford loans for an award year, based on the system grade level and dependency status.

20.8.1 Setting Up Federal Stafford Loan Limits IGFAW021

The annual stafford loan limits are determined not only by need, cost of attendance, and other financial aid received, but also by student dependency status and grade level. The total aggregate limits for federal stafford loans are determined by dependency status and grade level.

The Federal Stafford Loan Limits window displays the award year and effective dates.

The Loan Details region displays the system grade level, dependency status, DL grade level, FFELP grade level, subsidized annual limit, total annual limit, subsidized aggregate limit, and total aggregate limit.

Prerequisites

Calendar Types IGSCA002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Loan Processing > Federal Stafford Loan Limits > Federal Stafford Loan Limits window

Steps

1. Select the award year for which you wish to specify federal Stafford loan limits.
2. In the Loan Details region, select the dependency status, direct loan grade level, and the FFELP grade level.

Note: The limits you specify apply to students who fall under the grade levels and are of the specified dependency status.
3. Enter the subsidized annual limit, which is the annual limit for subsidized loans, for the award year.
4. Enter the total annual limit, which is the annual limit for all loans, for the award year.
5. Enter the subsidized aggregate limit, which is the overall limit for subsidized loans for the entire duration of a student's stay at the institution.
6. Enter the total aggregate limit, which is the overall limit for all loans for the entire duration of a student's stay at the institution.
7. Save your work.

20.8.2 Setting Up Financial Aid Grade Level Mapping IGFAP033

Use this procedure to map the class standing defined in Oracle Student System to the Financial Aid grade level codes.

Prerequisites

Class Standing IGSPR015

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Financial Aid Super User

Navigation

Financial Aid > Setup > Application Processing > Enrollment Mappings > Financial Aid Grade Level Mapping > Financial Aid Grade Level Mapping window

Steps

Enter data in each field of the window as described in the table. Save your work.

Financial Aid Grade Level Mapping Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Award year
Effective Dates	Display only		Program effective start and end dates Note: Dates populate when you select an award year.
Program Type	Display only		Oracle Student System program type

**Student System
Class Standing
Region**

Class Standing	Display only		Derived class standing values
Description	Display only		Derived class standing value description
Minimum Credit Points	Display only		Minimum accumulated credit points of class standing in context
Maximum Credit Points	Display only		Maximum accumulated credit points of Class Standing in context.
Academic Year	Display only		Context Academic Year

Financial Aid Grade Level Mapping Window Description

Field Name	Type	Features	Description
Financial Aid Grade Levels Region			
Direct Loan Level		List of Values	Direct Loan grade level
Direct Loan Description	Display only		Direct Loan grade level description
FFELP Loan		List of Values	FFELP grade level
FFELP Loan Description	Display only		FFELP grade level description

20.9 Award Processing

The award processing subsystem determines how financial aid funds are distributed among students requesting financial aid. It includes the following procedures:

- entering fund types
- creating fund codes
- maintaining fund information
- creating cost of attendance types
- defining cost of attendance items
- assigning cost of attendance items to a particular cost of attendance type
- defining award groups
- creating award policies
- creating packaging sequences
- linking fund calendar relations
- rolling over fund attributes
- mapping external terms
- setting up award revision reasons

20.9.1 Setting Up Fund Type IGFAW008

Fund types are set up to identify institutional fund types which may be used by the institution for reporting purposes.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Type window

Steps

1. In the Fund Type window, enter fund type codes and corresponding descriptions.
2. Active is selected by default. Deselect it to make a fund type inactive, preventing further use of the record.
3. Save your work.

20.9.2 Setting Up Fund Codes IGFAW009

The fund code procedure enables users to create fund codes by associating an (institutional) Fund Type, System Fund Code, System Fund Type, and Fund Source to the fund.

Prerequisites

Fund Types IGFAW008

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Code > Fund Code window

Steps

Enter data in each field of the window as described in the table. Save you work.

Table 20–14 Fund Code Window Description

Field Name	Type	Features	Description
Fund Code	required		User-defined fund code
Description	required		User-defined fund code
Fund Type	required	List of values	User-defined fund type code and description
System Fund Code	required	List of values	System-defined fund code to be associated with the user-defined fund code; Only one fund can be mapped to a System Fund Code, with the exception of General Fund and External Fund. Work Study can have any number of funds mapped to it, but only one fund can have the Fund Source set to Federal. Based on this field the System identifies the following funds, and processes them differently: Alternate Loan, Direct Loan PLUS, Direct Loan Subsidized, Direct Loan Unsubsidized, External Fund, FFELP PLUS, FFELP Subsidized, FFELP Unsubsidized, Federal Supplemental Educational Opportunity Grant, General Fund, Pell Grant, Perkins Loan, Sponsorship, and Work Study
Fund Source	Required		Fund source
System Fund Type	display only		System-defined fund type to be associated with the user-defined fund code
Active	optional	Check box	If selected, indicates that the user-defined fund code is active

20.10 Setting Up Fund Manager IGFAW010

The fund manager procedure enables users to set fund properties and maintain fund information. Only users with appropriate access rights can manage fund information. Fund management is a set of activities and processes that define fund sources and create financial aid award packages for students.

A financial aid award package is made up of one or more funds where each fund has a set of conditions that governs the criteria for allocating funds. The associated attributes that define how the fund can be used include the following: amount

available to award students, rules governing the disbursement of funds, and summary information used to create reports.

Summary Tab

The summary tab enables users to enter the fund authorization information and view fund statistics by award status.

Packaging Tab

The packaging tabs enables users to enter award packaging constraints, disbursement creation information, and Award Notice text for the fund.

Disbursements Tab

The disbursements tab enables users to enter details of the fund disbursement and specify pays only fee classes, pays only programs, pays only units and to do items.

Student Employment Tab

The student employment tab enables users to enter work study parameters such as hourly rates and notification threshold.

Relative Funds Tab

The Relative funds tab enables user to specify fund which, if listed as Exclusive will prevent the fund in context from awarding and / or, if listed as Contingent, must be present for the fund in context to be awarded.

Terms Tab

The terms tab enables users to specify the terms for awarding the fund.

Prerequisites

Date Alias IGSCA006

Financial Aid Attendance Types IGFA032

Fee Types IGSFI012

Credit Types IGSFI05

To Do Items IGFA027

Basic Program Details IGSPS013

Basic Unit Details IGSPS047

Load Calendars IGSCA004

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Fund Code	Required	List of values	Fund code and description
Type	Display only		Fund type of selected fund code
Source	Display only		Source of selected fund code
Award Year	Required	List of values	Award year for which selected fund is to be managed
Effective Dates	Display only		Start and end dates of validity of selected award year
Discontinue Fund	Optional	Check box	If selected, packaging process does not consider this fund
[Descriptive Flexfield]	Optional		User-customization field

Summary Tab

Authorized Amount	Required		Total authorized amount available for named fund in named award year
Exceed By Amount	Optional		Amount by which given authorized amount can be exceeded
Exceed By %	Optional		Percentage of authorized amount allowed in excess of authorized amount

Summary Totals Region

Offered Amount	Display only		Total amount of authorized amount actually offered in given award year
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Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Offered Award Count	Display only		Total number of awards offered in given award year from given fund
Accepted Amount	Display only		Total amount of offered amount accepted in given award year
Accepted Award Count	Display only		Total number of offered awards accepted in given award year from given fund
Declined Amount	Display only		Total amount of offered amount declined in given award year
Declined Award Count	Display only		Total number of offered awards declined in given award year from given fund
Canceled Amount	Display only		Total amount of authorized amount cancelled in given award year
Canceled Award Count	Display only		Total number of authorized awards cancelled in given award year from given fund
Disbursed Amount	Display only		Total amount of accepted amount disbursed in given award year
Disbursed Award Count	Display only		Total number of accepted awards disbursed in given award year from given fund
Remaining to Disburse	Display only		Number of accepted awards left to be disbursed for given award year and fund
Remaining to Award	Display only		Total number of offered awards not accepted or declined that remains to be awarded

**Packaging
Tab**

Min Award Amount	Optional		Minimum amount to be awarded per award count
Max Award Amount	Required		Maximum amount that can be awarded per award count from given fund; once set, validates against this to prevent any excess being awarded
Max Yearly Amount	Optional		Maximum amount that can be awarded in a given award year
Lifetime Max Amount	Optional		Maximum award a student can receive from this fund

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Award Expiration Offset	Optional	List of values	Date alias for the duration after which the award is canceled if not accepted
Initial Award Status	Required	List of values	Award status at the beginning of award year
Round Off Factor	Optional	List of values	Round off factor for the award sum
Lifetime Max Terms	Optional		Maximum number of terms a student may receive this fund at this insitution
Min Disbursements	Optional		Minimum number of disbursements
Max Disbursements	Optional		Maximum number of disbursements
Print Award Letter	Optional	Check box	If selected, fund will appear on award letter correspondence
Replace Family Contribution	Optional	Check box	If selected, allows fund to replace to student's family contribution
Entitlement	Optional	Check box	If selected, this fund is awarded irrespective of the need
Update Need	Optional	Check box	If selected, reduces the need by the amount awarded
Manual Packaging	Optional	Check box	If selected, allows fund to be awarded manually
Self Help	Optional	Check box	If selected, indicates that this fund is of the type self help
Gift Aid	Optional	Check box	If selected, indicates that this fund is of type Gift Aid
Auto Packaging	Optional	Check box	If selected, fund can be used in automatic award packaging process
Exceed Authorized Funds	Optional	Check box	If selected, packaging process takes into account the amount or percentage specified as Exceed By on Summary

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Award Text	Optional	Button	Opens Editor window for users to enter fund description text for Award Letter correspondence
Disbursements Tab			
Eligibility Criteria	Required	Drop-down list	Attendance type or credit points
Min Attendance Type	Optional	List of values	Minimum attendance type; must be specified if eligibility criterion is attendance type
Fee Type	Optional	List of values	When a disbursement is reduced or cancelled, charge is created against this fee type in student finance
Credit Type	Optional	List of values	Disbursement is credited into this credit type in student finance
No NSLDS History Disbursement Date Offset	Required		Disbursement offset date alias in case no NSLDS record exists
Disbursement Expiration Offset	Optional	List of values	Date by which planned disbursements are cancelled
Verification Enforcement Date Offset	Optional	List of values	Offset date alias for verification of actual disbursement against enrollment and pays only validations
Allow First Disbursement to Non Verified Student	Optional	Check box	<p>If selected, the first disbursement is allowed when the student's verification status is without documentation.</p> <p>The default for this check box is not selected. When the check box is not selected, all disbursement for a student are prevented when the verification status is without documentation.</p>
Disbursement Record Required	Optional	Check box	If selected, specifies that external agency's disbursement record must exist

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Promissory Note Required	Optional	Check box	If selected, promissory note status must be signed for disbursement
Origination Record Required	Optional	Check box	If selected, specifies that external agency's origination record must exist
Receipt of Funds Required	Optional	Check box	If selected, disbursement can take place only if the funds are received by the institution
Disburse to Student Account	Optional	Check box	If selected, this fund may be disbursed to the student account
Include as Planned Credit (J)	Optional	Check box	If selected, planned disbursements can reduce the balance owed on the student account
Ignore Verification and Application Process Statuses	Optional	Check box	If selected, a fund can be disbursed despite the validations for Verification and Application Process statuses
Credit Description	Display only		Description of credit
Allow First Disbursement to Non Verified Student	Optional	Check box	If selected, allows first disbursements of funds to be made to students who do not have terminal verification statuses
Pays Only Fee Classes	Optional	Button	You can restrict disbursement of this fund by Fee Class See Setting Up Pays Only Fee Classes in this chapter
To Do Items	Optional	Button	Specify To Do Items to be added when this fund is awarded See Setting Up To Do Items IGFAW027 in this chapter

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Pays Only Programs	Optional	Button	You can restrict disbursement of this fund by program participation See Setting Up Pays Only Programs in this chapter
Pays Only Units	Optional	Button	You can restrict disbursement of this fund by unit participation See Setting Up Pays Only Units in this chapter

Student Employment Tab

Payment Region

Government Share %	Optional		Government share percentage of wage
Employer Share %	display only		Employer share percentage of wage

Hourly Rates Region

Minimum	Optional		Minimum hourly wage
Maximum	Optional		Maximum hourly wage
Salary Based	Optional	Check box	If selected, specifies that the payment is salary-based

Notification Threshold Region

%	Optional		Either this, or a value must be specified; when the specified percentage of the fund is utilized, a notification is sent out
Value	Optional		Either this, or a percentage must be specified; when the specified value is utilized, a notification is sent out

Relative Funds Tab

Table 20–15 Fund Manager Window Description

Field Name	Type	Features	Description
Exclusive Funds Region			
Fund Code	Required	List of values	Code of exclusive fund
Description	Display only		Exclusive fund description
Contingent Funds Region			
Fund Code	Required	List of values	Code of contingent fund
Description	Display only		Relative fund description
Terms Tab			
Term Calendar	Display only		Term calendar
Start Date	Display only		Start date
End Date	Display only		End date
Installment %	Required		Percentage of the fund to be awarded in the specified term
Fund Term Installments	Optional	Button	Opens the Fund Term Installments window See Setting Up Fund Term Installments in this chapter

20.10.0.1 Setting Up Pays Only Fee Classes

The Pays Only Fee Classes setup specifies the fee classes which can be paid from a particular fund. A specified fund can only be used to pay for only these fee classes. Fee classes are defined under Student Finance.

Prerequisites

Fee Types IGSFI012

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager window

Steps

1. In the Disbursements tab, click Pays Only Fee Classes.
The Pays Only Fee Classes window appears.
2. Enter data in each field of the window as described in the table. Save your work.

Table 20–16 Pays Only Fee Classes Window Description

Field Name	Type	Features	Description
Fund Code	Default, display only		Fund code and description
Award Year	Default, display only		Award year code, start and end dates

**Fee Classes
Region**

Fee Class	Required	List of values	Fee class defined under Student Finance, such as Books, Course, etc.
Description	Display only		Description of fee class

20.10.0.2 Setting Up Fund To Do Items

The To Do Items setup specifies the action items to be performed before paying out a particular fund.

Prerequisites

Basis Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager window

Steps

1. In the Disbursements tab, click To Do Items.

The To Do Items window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 20–17 To Do Items Window Description

Field Name	Type	Features	Description
Fund Code	Default, display only		Fund code and description
Award Year	Default, display only		Award year code, start and end dates

To Do Items Region

To Do Items	Required	List of values	To do item code for the fund specified
Description	Display only		To do item description

20.10.0.3 Setting Up Pays Only Programs

The Pays Only Programs setup specifies the academic programs which can be paid from a particular fund. A specified fund can only be used to pay for only these programs.

Prerequisites

Basic Program Details IGSPS013

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager window

Steps

1. In the Disbursements tab, click Pays Only Programs.

The Pays Only Programs window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 20–18 Fund Pays Only Programs Window Description

Field Name	Type	Features	Descriptive
Fund Code	Default, display only		Fund code and description
Award Year	Default, display only		Award year code, start and end dates

**Programs
Region**

Program	Required	List of values	Academic program
Version Number	Required		Program version number
Description	Display only		Description

20.10.0.4 Setting Up Pays Only Units

The Pays Only Units setup specifies the academic program units which can be paid from a particular fund. A specified fund can only be used to pay for only these program units.

Prerequisites

Basis Unit Details IGSPS047

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager window

Steps

1. In the Disbursements tab, click Pays Only Units.

The Pays Only Units window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 20–19 Pays Only Units Window Description

Field Name	Type	Features	Description
Fund Code	Default, display only		Fund code and description
Award Year	Default, display only		Award year code, start and end dates

Units Region

Unit	Required	List of values	Program unit code
Version Number	Required		Unit version number
Description	Display only		Unit name or title

20.10.0.5 Setting Up Fund Term Installments

The fund term installments enables users to distribute funds across various teaching periods within terms in the award year.

Prerequisites

Date Alias IGSCA006

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager window

Steps

1. In the Terms tab, click Fund Term Installments.

The Fund Term Installments window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 20–20 Fund Term Installments Window Description

Field Name	Type	Features	Description
Fund Code	Display only		Code and description of fund for which installments to be setup
Award Year	Display only		
Terms Region			
Term	Display only		Codes of terms in named award year
Start Date	Display only		Start date of named term
End Date	Display only		End date of named term
Fund %	Display only		Percentage of fund to be awarded in specified term

Installment Distribution Region

Teaching Period	Required	Lost of values	Code of teaching period or periods within named term over which named fund is to be distributed for disbursement to applicant
Start Date	Display only		Start date of named teaching period
End Date	Display only		End date of named teaching period
Disbursement Date Offset	Optional	List of values	Date alias for disbursement offset
Cumulative Credit Points	Display only		Minimum cumulative credit points that are required for disbursing the fund in specified teaching period.
Fund %	Required		Percentage of the fund to be awarded for this teaching period
Done		<Default Paragraph Font>Button	Returns users to Fund Manager window

20.10.0.6 Setting Up Award Revision Reasons

The award revision reasons procedure enables users to setup various reasons when an award is modified. When users manually correct a disbursement they can set a revision code against the correction record stating the reason for revising the disbursement.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Award Packaging > Award Revision Reasons

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–21 Award Revision Reasons Window Description

Field Name	Type	Features	Description
Revision Code	Required		Revision ID
Description	Required		Award revision reason
Active	Optional	Check box	If selected, indicates that the award revision reason is active

20.11 Satisfactory Academic Progress

For financial aid, satisfactory academic progress is setup using the progression subsystem following fund setup. Refer to progression diagram. The windows below are required to support Satisfactory Academic Progress:

- Student Statistic Types IGSPR018
- Person Hold Types IGSEN042
- Progression Outcome Types IGSPR008
- Progression Rule Categories IGSPR001

- Progression Rules IGSPR006

20.12 Cost of Attendance

Cost of attendance (COA) is made up of many parts such as tuition, fees, room, board, books, travel, and miscellaneous costs. User are able to define COA items and associate and define distribution of costs of these items using COA groups.

20.12.1 Setting Up Cost of Attendance Items

The institution can define multiple items associated with a variable cost, for example, tuition. Users can create different COA items for the tuition of residents and nonresidents.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Items window

Steps

For each cost of attendance item, select/deselect Active to determine if the item is included in calculations. Save your work.

20.12.2 Setting Up Cost of Attendance Groups

Use this window to define, group, and distribute COA items.

Items are assigned and distributed across terms directly via the revised auto item assignment process and or directly on the Cost of Attendance Groups window.

Prerequisites

Cost of Attendance Items IGFAW002

Award Year IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Groups

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–22 Cost of Attendance Groups Window Description

Field Name	Type	Features	Description
Award Year	Required	List of values	Award year; you may query using this field
Effective Dates	Display only		Effective Dates for Award Year.
Group code	Required		User defined identifier to which COA items are mapped Note: At least one item is required to save the record.
Description	Optional		Provides more information about the group

Group Details Region**Items Tab**

Item Code	Required	List of values	Unique Identifier for Cost of Attendance Items. You define values for list of values in the Cost of Attendance Items window. Each Group created must have at least one Item in order to be saved.
Description	Display only	List of values	COA Item description. You define values for list of values in the Cost of Attendance Items form.
Amount	Required		User defined amount for the Cost of Attendance Item.
Pell Amount	Optional		User defined 9 month Pell amount for the Cost of Attendance Item.

Table 20–22 Cost of Attendance Groups Window Description

Field Name	Type	Features	Description
Pell Alternate Expenses	Optional		User defined Pell alternate expenses amount for the Cost of Attendance Item.
Fixed	Optional	Check box	Indicates that this is a fixed (direct) Cost of Attendance Item. When setting up Award Groups, users have to option to award only against fixed (direct) costs
Item Distribution	Display only	Check box	System sets this indicator when an item distribution is saved in the Item Distribution window that differs from the group distribution See Setting Up Item Distribution in this chapter
Active	Optional		Indicates whether item is active
Item Distribution	Optional	Button	Opens the Item Distribution window

Terms tab

Term	Required	List of values	A term belonging to the Award year. At least one term is required to be able to save a record. Additional terms are optional.
Start Date	Display only		Start date of the Term
End Date	Display only		End Date of the Term
%	Required		% of distribution of funds for that term % is required for the required term. % is also required for any additional terms that are created All Terms together just add up to 100%.

20.12.3 Setting Up Item Distribution

The distribution of the cost of attendance across the terms is applicable to all of the items. However, for a particular item, the distribution across terms can be changed such that the percentages specified in this window override those set at the group level for that item.

Prerequisites

Cost of Attendance Groups

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Groups

Click **Item Distribution**

Steps

1. In the Budget Items tab, click Distribution Override.

The Item Distribution window appears.

2. Enter data in each field of the window as described in the table. Save your work.

Table 20–23 Cost of Attendance Item Distribution Window Description

Field Name	Type	Features	Description
Award Year	Display only		Award year
Start Date	Display only		Effective Dates for Award Year.
Group code	Display only		Context group code
Description	Display only		Provides more information about the group
Item Code	Display only		Item code
Description	Display only		Provides more information about the item
Terms Region			
Term	Display only		Term for cost of attendance group
Start Date	Display only		Start date for cost of attendance group

Table 20–23 Cost of Attendance Item Distribution Window Description

Field Name	Type	Features	Description
End Date	Display only		End date for cost of attendance group
%	Required		Percentage of the cost of attendance for the specified item for the specified term; all percentages must add up to hundred
Done	Optional	Button	Returns you to the Cost of Attendance Groups window

20.13 Award Packaging

Award packaging requires setting up award groups, which includes defining award limits and packaging sequence.

20.13.1 Setting Up Award Groups

Use the award groups procedure to define the upper level constraints of a student’s financial package. For example, a school has a policy stating that incoming freshmen cannot receive more than 60% in grant assistance or the maximum grant assistance from all grant funds cannot exceed \$5,000.

Awarding Limits (formerly known as Policies) and Fund Sequences are tied directly to Award Groups, which are tied directly to an Award Year.

Award groups set overall packaging constraints on each group of students. Schools can set these high-level constraints based on several variables and to set them either as a percentage or a fixed dollar amount. In addition, schools can set a gap amount or percentage for a group of students. This is essentially an unmet need amount applied before any aid is awarded. The policy also specifies the total amount of package aid that a student can receive.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Award Packaging > Award Groups window

Steps

1. Select Award Year.
2. Define Group Code.
3. Define Group Code Definition.
4. Optionally, enter maximum total award package amount for the group in the Award Limits tab.
5. Optionally, for grants, loans, scholarships, work aid, gift aid, self help, and gap amount, enter a fixed amount, or enter the percentage of one of the need analysis factors limits. the total amount in the Award Limits tab.
6. Select Award using Fixed Cost of Attendance only if the only if this group should only be packaged using with fixed (direct) cost of attendance items in the Award Limits tab.
7. Enter sequence number for fund in the Fund Sequence tab.
8. Enter Fund Code. Fund Description and Minimum and Maximum amounts populate automatically in the Fund Sequence tab.
9. Optionally, alter the Minimum and Maximum amounts for this group in the Fund Sequence tab.
10. To associate this setup with a Person ID group, select Person ID Group from the list of values.
11. Save your work.

Guidelines

Loans and work aid map to and are mutually exclusive with self-help aid. Grants and scholarships map to and are mutually exclusive with gift aid.

The need analysis elements are used to limit award amounts using either fixed amounts or percentages of cost of attendance, expected family contribution (EFC), gross need, and net need.

The gap amount that is the initial amount added to the EFC to decrease a student's need. The gap amount is not packaged. The maximum package is the COA minus the gap amount.

Users can specify if only fixed (direct) costs amounts can be used for awarding. The System Fund Types of Grant, Loan, Work Study, and Scholarship map to either Gift Aid or Self Help Award Limits.

You can filter Fund level capabilities of student populations during the Award Process. This is achieved by allowing the user to define a Person ID Group for each Fund on the Award Groups form, Fund Sequence Tab. The Students that are contained in both the fund Person ID group and the Award Group receive the specially filtered funds.

20.14 Rollover Fund Attributes

To facilitate, year to year set ups that are similar, users can map calendars between award years to rollover Fund Manager setups.

20.14.1 Setting Up Fund Calendar Relations IGFAW018

The fund calendar relations enables users to link calendar instances with each other. Users can find out the equivalent calendar instance of the previous year or the successive year.

Prerequisites

Calendar Types IGSCA002

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Calendar Relations window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 20–24 Fund Calendar Relations Window Description

Field Name	Type	Features	Description
Current Year			
Region			

Table 20–24 Fund Calendar Relations Window Description

Field Name	Type	Features	Description
Calendar	Required	List of values	Calendar instance such as term or teaching period; This information is used during Fund Rollover Process. Whenever a fund is rolled over, the process picks each term and teaching period for the specified fund and searches for the succeeding year's term or teaching period from this setup window. Users can map 2 calendar instances in the current year to 1 calendar instance in the succeeding year.
Succeeding Year Region			
Calendar	Required	List of values	Corresponding calendar for the succeeding year

20.14.2 Setting Up Fund Rollover Process

The fund rollover procedure enables users to rollover funds from one award year to the successive award year. The disbursement schedule for the new fund is created based on the calendar rollover information that is entered in the fund calendar rollover relationships.

Prerequisites

Calendar Types IGSCA002

Fund calendar relations IGFAW018

Responsibility

Oracle Student System Super User

Navigation

Financial Aid > Setup > Award Processing > Funds > Rollover Fund Attributes > Rollover Fund Attributes window

Steps

1. Enter data in each field of the Rollover Fund Attributes window. The following information applies to the rolling over fund attributes procedure:
 - Rolling over fund attributes is performed at the award year level

- Rolling over fund attributes can be performed only once
 - In case any fund fails the rollover for some reason, then these funds have to be rolled over individually as per the Fund Rollover Concurrent Procedure.
2. Click Rollover to roll over fund attributes to the specified award year.
 3. Save your work

Table 20–25 Rollover Fund Attributes Description

Field Name	Type	Features	Description
Rollover	Optional	Button	Rolls over fund attributes from the specified award year to the succeeding award year as defined in Fund Calendar Relations.

21.1 Universities and Colleges Admissions Services Overview

The Universities and Colleges Admissions Service (UCAS) provides a central admission system for higher education institutions in the United Kingdom. Instead of applicants contacting the institutions individually, applications for full time undergraduate, nursing, social work and teacher training courses are received and managed by the central clearing houses UCAS, NMAS, SWAS and GTTR. The primary task of the UCAS interface in Student System is to process applications from the central clearing houses, including the related transaction processing and reporting.

The UCAS interface enables users to perform the following actions:

- import and maintain UCAS, NMAS, SWAS and GTTR reference data
- import applicant and application details from UCAS and create person records in OSS
- create and maintain offer condition templates in a generic offer library
- export application detail, including the UCAS replies, to the Oracle Student System Admissions subsystem
- make decisions on the applications and generate the UCAS transactions
- export transactions, program alterations, and institution-specific offer codes to UCAS.

The UCAS interface supports both the HERCULES and Marvin UCAS systems.

UCAS functionality is enabled by setting IGS: Country Code profile option to United Kingdom.

Year of Program functionality is enabled by setting IGS: Career Model Enabled profile option to No.

To configure the UCAS interface, you must do the following:

- define the UCAS profile option values
- define system definition
- define the current institution
- set up UCAS interface details
- import UCAS reference data including reference data, common data and the institution profile
- maintain control details
- map UCAS decision and reply codes to Admissions outcome status and offer response codes
- map UCAS residential category to OSS person residency status
- map UCAS previous education codes to OSS codes

21.2 UCAS Profile Options

Set up the following UCAS Profile Options:

IGS: UCAS Interface Type

Refer to Appendix A, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

21.3 Setting Up Definition of System Details

You use the Definition of System Details window to configure the system you plan to use. Systems include the following:

- GTTR
- NMAS
- SWAS
- UCAS

For each of these, you define the security number. This Marvin security number attached to the flat file helps UCAS identify the institution from which the flat file was received.

Checking the Search Hercules Name ensures that when an application inquiry is recorded, the Hercules view cvname is checked to see if the applicant is known to UCAS.

Checking Clearing Allowed allows institutions to run Clearing for the system.

Checking Extra Processing Allowed allows institutions to process EXTRA inquiries and applications for the system.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

UCAS Interface > UCAS Setup > Definition of System Details window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 21–1 Definition of System Details Window Description

Field Name	Type	Features	Description
System Code	Required	List of values	Code of the system you plan to use Valid values include G, N, S, and U.
System Name	Display only		System name of the system you plan to use Valid values include GTTR, NMAS, SWAS, and UCAS.
Description	Required	Display only	Descriptions of the system code Valid values include Graduate Teacher Training Register, Nursing and Midwifery Admissions System, Social Work Admission System, and Full Time Undergraduate System.

Table 21–1 Definition of System Details Window Description

Field Name	Type	Features	Description
Security Key	Required		Number attached to the flat file; indicates institution from which file was received Note: This security key for the given system ID is used while sending the data file to MARVIN. Note: The security key must be the same for all systems.
Marvin File Sequence Number	Optional		Sequence number of the latest MARVIN movement section to be successfully processed for each UCAS subsystem Note: Applicable only when using MARVIN interface.
Clearing Allowed	Optional	Check box	If selected, the CLEARING processing period is allowed
Extra Processing Allowed	Optional	Check box	If selected, indicates that Extra processing is allowed. Note: Extra processing is not allowed for small systems.
Search Hercules Name	Optional	Check box	If selected, indicates that the HERCULES view cvname will be checked when an application inquiry is recorded

21.4 Define the Current Institution

Before the reference data can be imported from UCAS the UCAS institution code for the institution needs to be defined as an institution in the UCAS Common Data.

For information on how to define an institution please refer to the *Oracle Student System for the United Kingdom User Guide*.

21.5 Setting Up UCAS Interface

The UCAS Setup window contains default information used in the UCAS interface and for exporting applications to Oracle Student System. System administrators can define the following information:

- academic and admissions calendars
- test data for sending test transactions to UCAS
- admission process category and type, Admissions Outcome, Decision Reason and Decision maker codes used when importing applications and the alternate person id type corresponding the UK National Insurance Number

Set Up UCAS Interface Defaults

The default information used during the UCAS and Oracle Student System import process is defined in the UCAS Setup window. The following data must be defined:

- UCAS institution identification code and format of the UCAS applicant numbers
- applicant number, choice number, and the transaction type to be used while sending test transactions to UCAS
- Oracle Student System calendars, the admission process category and type, the admission outcome, decision reason, decision maker and national insurance number alternate person id type to be used when importing applicant and application details from the UCAS interface module to core Oracle Student System

Prerequisites

Calendar IGSCA002

Admission Categories IGSAD036

Admission Process Category Details IGSAD037

Application Types IGSAD085

Alternate Person ID Types IGSPE052

Admission Decision Reasons IGSAD058

Admission Outcome Statuses IGSAD010

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

UCAS Interface > UCAS Setup > UCAS Setup window

Steps

Enter data in each field of the window as described in the table.

Table 21–2 UCAS Setup Window Description

Field Name	Type	Features	Description
Calendar Tab			
Academic Calendar Alternate Code	optional	list of values	institution-defined academic year calendar used as default for current UCAS applications exported to Student System
[Description]	display only		Academic Calendar Description
Admissions Calendar Alternate Code	optional	list of values	institution-defined admissions calendar used as default for current UCAS applications exported to Student System
[Description]	display only		Admissions Calendar description
Deferred Region			
Academic Calendar Alternate Code	optional	list of values	institution-defined academic year calendar used as default for deferred UCAS applications exported to Student System
[Description]	display only		Academic Calendar Description
Admissions Calendar Alternate Code	optional	list of values	institution-defined admissions calendar used as default for deferred UCAS applications exported to Student System
[Description]	display only		Admissions Calendar Description
Test Data Tab; only enabled if using Hercules			

Table 21–2 UCAS Setup Window Description

Field Name	Type	Features	Description
Applicant Number	optional		applicant number to use for test transactions sent to UCAS; must be the UCAS applicant number of an applicant to the institution
Choice Number	optional		choice number to use for test transactions sent to UCAS; must be numeric and the choice number of an application from the selected applicant
Transaction Type	optional	list of values	test transaction type; valid values are XA, experimental amended decision, or XD, experimental first decision
Miscellaneous Tab			
Admission Process Category	optional	list of values	admission category code to use as default when exporting application records to Student System; for example general undergraduate
Admission Process Type	optional	list of values	admission type to use as default when exporting records to Student System; display only unless admission process category selected
Admission Number Format	optional		specifies UCAS application number format when displayed in UCAS reports; must consist of nine digits and any required punctuation, for example 12-12345-67
Current Institution Code	optional	list of values	UCAS code of institution where Student System software is installed
NI Number Type	Optional for NMAS system only	List of values	Specifies the alternate person id type used for National Insurance Number

Table 21–2 UCAS Setup Window Description

Field Name	Type	Features	Description
Decision Maker Number	Optional	List of values	Person number used to populate the decision maker number in the admissions decision import process when importing bulk reject decisions from UCAS
Decision Reason	Optional	List of values	OSS user decision reason used to populate the decision reason in the admissions decision import process when importing a bulk reject decision from UCAS
Pending Outcome Status	Optional	List of values	OSS user outcome status used to populate the outcome status in the admissions decision import process when importing the bulk reject decision from UCAS
Obsolete Outcome Status	Optional	List of values	OSS user outcome status used to populate the outcome status in the admissions decision import process when obsoleting an application
Rejected Outcome Status	Optional	List of values	OSS user outcome status used to populate the outcome status in the admissions decision import process importing a bulk reject decision from UCAS

21.6 Import UCAS Reference Data

This section consists of the following sections:

- Import UCAS Reference Data
- Load GTTR Degree Subjects
- Load Small Systems Institutions
- Load Small Systems Error Codes

21.6.1 Import UCAS Reference Data

Institutions import UCAS reference and common data from UCAS into the Oracle Student System UCAS subsystem via the Hercules interface.

Additional reference data made available by UCAS as flat files for the small systems are loaded into the UCAS reference data tables.

21.6.1.1 Import UCAS Reference and Common Data

Reference data includes generic UCAS codes for exam level, awarding body, offer subject, domicile, offer abbreviations, disability, transaction error codes, establishment groups, ethnicity, sponsor codes, key words, other educational qualifications, occupation codes, residential category, school type, status codes, subject codes, UCAS groups UCAS tariff social and socio-economic classes, Pre-2000 occupation codes, and joint admission entities, GTTR degree subjects.

Common data includes the UCAS Higher Education institutions, schools, and Exam Board Listing examination subjects.

Prerequisites

Hercules Connector Module

UCAS Setup IGSUC001

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run (Single Request)

- Import Data from UCAS Process

Steps

1. Select the Import Data from UCAS Process concurrent process.
2. Set the parameters as follows:
 - Report Mode to No
 - Commit level to Null
 - Import Application Data to No
3. Submit the process.
4. When complete review log file for any errors.

21.6.2 Load GTTR Degree Subjects

UCAS provide the GTTR subject codes as a flat file which can be downloaded from the UCAS firewall. The file must be saved onto a file system accessible by the concurrent manager.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Degree Subjects for GTTR System

2. Enter the full directory path and filename of the file of GTTR subject codes for the filename parameter.
3. Submit the request.
4. When complete review log file for any errors.

21.6.3 Load Small Systems Institutions

The Institution reference data available on Hercules does not include the institutions for the small systems. This data is made available as flat files, one per system. The files must be retrieved from the firewall and saved in a file system accessible to the concurrent manager.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Institution Code Files

2. Enter the full directory path and filename of the file of institutions code file to be loaded and the system code
3. Submit the request
4. When complete review log file for any errors.

21.6.4 Load Small Systems Error Codes

The Institution reference data available on Hercules does not include the transaction error codes for the small systems. This data is made available as flat files, one per system. The files must be retrieved from the firewall and saved in a file system accessible to the concurrent manager.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Requests - Concurrent Manager - Requests - Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Error Code Files

2. Enter the full directory path and filename of the file of institutions code file to be loaded and the system code.
3. Submit the request.
4. When complete review log file for any errors.

21.7 Setting Up Control Details for Small Systems

This window enables users to view control information imported from UCAS and set up control details for small systems.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

UCAS Interface > UCAS Data Control > View Control Information window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 21–3 UCAS Control Information Window Description

Field Name	Type	Features	Description
Entry Year	display only		year of entry to institution
Time of Year	display only		current time of year reached in UCAS processing
Route B Time of Year	display only		current time of year for Route B applications
Time of Day	display only		time current processing information imported
Applicant Numbers Region			
First	display only		first applicant number in use
Maximum	display only		highest applicant number available
Last	display only		applicant number entered most recently
First Over Seas Partnership	display only		first applicant number registered as overseas application
First RPA Non EU	display only		first applicant number with record of prior acceptance from outside European Union
First RPA EU	display only		first applicant number with record of prior acceptance from within European Union
Last Daily Run Number	display only		reference number for last daily processing run

Table 21–3 UCAS Control Information Window Description

Field Name	Type	Features	Description
Last Daily Run Date	display only		date of last daily processing run
Last Application by Advisory Closing Date	display only		reference number of last application received before UCAS closing date for standard or Route A applications
Date of Advisory Closing Date Run	display only		date of final processing run for all standard or Route A UCAS applications
Last Application by Route B Closing Date	display only		reference number of last application received before UCAS closing date for Route B applications
Date of Route B Closing Date Run	display only		date of final processing run for all Route B UCAS applications
Last App. in Decision Processing Run	display only		reference number of last application number in the processing run for decisions
Date of Decision Processing Run	display only		date of final processing run for all application decisions
News	display only		supplemental update information imported from UCAS
No More Amended Decision Transactions	display only	check box	if checked, indicates no further amended decisions available from UCAS
Star X Data Available	display only	check box	if checked, indicates Star X HESA data available from UCAS
Extra Processing Start Date	Display only		Date UCAS Extra processing starts
Last Passport Application Date	Display only		Date by which applicants must have applied for an Extra Passport
Last LE Transaction Date	Display only		Last date UCAS will accept and process LE transactions
GTTR Region			
Entry Year	Required		Year of entry for current application cycle

Table 21–3 UCAS Control Information Window Description

Field Name	Type	Features	Description
First Application Number	Required		First application number Note: Range cannot overlap with other ranges.
Maximum Application Number	Required		Maximum application number Note: Range cannot overlap with other ranges.
NMAS Region			
Entry Year	Required		Year of entry for current application cycle
Time of Year	Optional	List of values	NMAS time of year Valid values include Null (clearing not started), A (CEFs sent to applicants), and C (clearing started)
First Application Number	Required		First application number Note: Range cannot overlap with other ranges.
Maximum Application Number	Required		Maximum application number Note: Range cannot overlap with other ranges.
SWAS Region			
Entry Year	Required		Year of entry for current application cycle
First Application Number	Required		First application number Note: Range cannot overlap with other ranges.
Maximum Application Number	Required		Maximum application number Note: Range cannot overlap with other ranges.

21.8 UCAS Decision/Reply Code Mappings

UCAS application choices include the standard UCAS decision and reply codes. When applications are exported from the UCAS interface to Oracle Student System,

the decision and reply codes are mapped to Oracle Student System application outcome statuses and offer responses. This form allows for UCAS decisions to be mapped to Oracle Student System Application outcome statuses and for UCAS decisions and replied to be mapped to Oracle Student System offer responses.

Prerequisites

Define Admissions User Outcome Status IGSAD010

Define Admissions User Offer Responses IGSAD012

Responsibility

Oracle Student System Super User

Navigation

UCAS Interface -> UCAS Setup -> UCAS Code Mappings

Steps

Enter data in each field of the window as described in the table. Save your work..

Table 21–4 UCAS Code Mappings Window Description

Field Name	Type	Features	Description
UCAS System	Display only		Code that identifies the UCAS admissions system to which the mapping applies
[Description]	Display only		Name that identifies the UCAS admissions system to which the mapping applies
UCAS Decision to Outcome Status Tab			
UCAS Decision	Required	List of values based on UCAS system decisions or text entry	<p>The UCAS decision code that an institution may take on an application choice</p> <p>The text entered must be a valid UCAS decision code</p> <p>The decision code must be valid for the chosen UCAS admissions system</p>
UCAS Decision Outcome Status	Display only		The system outcome status associated with the UCAS Decision

Table 21–4 UCAS Code Mappings Window Description

Field Name	Type	Features	Description
User Outcome Status	Required	List of values based on Student System user outcome status or text entry	User outcome status code
Default Flag	Optional	Check box	If selected, indicates the default user outcome status to be assigned to an application instance when the outcome status is set from the decision being imported from UCAS
Closed	Optional	Check box	If selected, indicates that this mapping should no longer be used.
UCAS Decision Description	Display only		Description of lookup type IGS_UP_APP_DECISION
User Outcome Status Description	Display only		Outcome status description
System Outcome Display Description	Display only		Description of lookup type ADM_OUTCOME_STATUS associated with the UCAS decision outcome status
UCAS Reply to Offer Response			
UCAS Decision	Required	List of values based on UCAS system decisions or text entry	UCAS decision code that an institution may take on an application choice
UCAS Reply		List of values based on UCAS reply	UCAS reply code
User Offer Response		List of values	Oracle Student System offer response code to which the UCAS decision/reply combination map
Closed	Optional	Check box	If selected, indicates that this mapping should no longer be used
UCAS Decision Description	Display only		Description associated with the UCAS decision code

Table 21–4 UCAS Code Mappings Window Description

Field Name	Type	Features	Description
UCAS Reply Description	Display only		UCAS reply description associated with the selected UCAS reply code
User Offer Response Description	Display only		Description assigned to the chosen Student System offer response code

21.8.1 Map UCAS Residential Category to Oracle Student System Person Residency

Map UCAS Residency Category to Oracle Student System Residency Status

The UCAS applicant residential category is imported to the Oracle Student System as the person's residence. The UCAS residential category is mapped to an Oracle Student System person residency status. The mapping associations, specifying the Oracle Student System residency status to be mapped to UCAS residency category, are defined as part of the seed data.

Prerequisites

Person Residency Status Lookup

Responsibility

Oracle Student System Super User

Navigation

HESA Returns > HESA Setup > Maintain Code Mappings window

Steps

1. Query back the association code UC_OSS_RESCAT_ASSOC.
2. Enter the data in the fields as described in the table below.

Table 21–5 Association Code Data

Code	Required	Type	Description
Description	Required	N/A	Description of the code association
UCAS RESCAT	Required	Lookup	UCAS residential category code
OSS Rescat	Required	Lookup	Oracle Student System person residency status code

See Also

See Chapter 22, "HESA" for more information.

21.8.2 Mapping UCAS Previous Education Codes to Oracle Student System Codes

Before the applicant previous education and qualification details information can be exported from the UCAS interface to Oracle Student System, the UCAS codes must be mapped to Oracle Student System codes. This includes:

- mapping UCAS schools to previous institutions
- mapping UCAS exam board codes to institutions
- mapping UCAS levels to Awards
- mapping UCAS subject codes to the Student System fields of study

Seed data is provided for each of the following mappings:

- UCAS School to OSS institutions - UC_OSS_HE_INS_ASSOC
- UCAS exam boards to OSS institutions - UCAS_OSS_AWD_BDY_ASSOC
- UCAS Exam Board Levels to OSS Awards - UCAS_OSS_AWD_ASSOC
- UCAS Subject Codes to OSS Fields of Study - UCAS_OSS_SBJ_ASSOC

and the mappings are maintained using the HESA Maintain Code Mappings form.

Prerequisites

Institutions IGSOR029

Awards for entry qualifications IGSPS008

Grading schema for entry qualifications IGSAS025

Program Fields of Study IGSPS004

Responsibility

Oracle Student System Super User

Navigation

HESA Returns > HESA Setup > Maintain Code Mappings window

Steps

1. Query back the association code.
2. For each mapping, enter Description, UCAS Code, and OSS Code.

See Also

For further details on using the Maintain Code Mappings window, see Chapter 22, "HESA".

22.1 Higher Education Statistics Agency Overview

All United Kingdom higher education institutions are required to submit student based statistical returns to the Higher Education Statistical Agency (HESA). Oracle Student System provides a subsystem to enable institutions to capture the data required and generate the HESA return files in the format required by HESA.

The HESA interface enables users to perform the following tasks:

- define Oracle Student System code sets
- define and maintain mapping between Oracle Student System codes and HESA codes
- capture student- and program-based information for HESA
- calculate student full-time equivalence
- define user return classes based on provided system return classes
- define, generate, and maintain HESA extracts
- export HESA data from the UCAS interface to Oracle Student System
- generate extract files for submission to HESA

HESA functionality is enabled by setting IGS: Country Code profile option to United Kingdom.

Year of Program functionality is enabled by setting IGS: Career Model Enabled profile option to No.

To configure HESA, you must do the following:

- Define HESA Reference Codes
 - common to all institutions
 - specific to English Institutions
 - specific to Welsh Institutions
 - specific to Northern Irish Institutions
 - specific to Scottish Institutions
- Map UCAS, Oracle Student System, and HESA Reference Data
- Define Reference Data for deriving HESA Combined and Student return fields 76 and 77 PGCEBJ and PGCECLS
- Define Reference Data for deriving HESA Combined and Student return field 66 FEEELIG
- Define Reference Data for deriving HESA Combined and Student return field 31 TTACCOM
- Define Reference Data for deriving HESA module return field 6 FTE
- Define Reference Data for deriving HESA Combined and Student return field 65 FUNDCODE
- Identify Highest Qualification on Entry Grading Schema
- Setting Up UCAS Tariff Calculation

22.2 Define HESA Reference Codes

HESA data is collected about programs, year of programs, units, students, student program attempts, student year of programs and student unit enrollments throughout Oracle Student System. The data is collected using Oracle Student System reference codes. When the HESA extraction process is run, the Oracle Student System reference codes are mapped to the HESA field codes. The HESA field codes are defined and maintained in Oracle Student System using the HESA Maintain Codes Window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

HESA Returns > HESA Setup > Maintain Codes window

Steps

1. In the Code field, query a code as follows:
View > Query By Example > Enter
2. Run the query as follows:
View > Query by Example > Run
3. In the Value field, enter a code value.
4. In the Description field, enter a code description.
5. Save your work.

Table 22–1 Maintain Codes Window Description

Field Name	Type	Features	Description
Code	Required		Code name uniquely identifying association
Description	Display only		Code description
Display Title	Display only		Short title for code when used as mapping source in Maintain Code Mappings window
Value	Conditionally required		Code type value
Description	Conditionally required		Description of each valid code

22.3 Define Mapping Between HESA Reference Codes and Oracle Student System Codes

HESA requires that the data returned to them is reported using valid HESA codes. HESA field codes are mapped to OSS codes using the HESA Maintain Code Mappings Window. A code association is defined for each code mapping required.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

HESA Returns > HESA Setup > Maintain Codes Mappings

Steps

1. In the Code Association field, query a HESA code Association as follows:

View > Query By Example > Enter

2. Run the query as follows:

View > Query by Example > Run

3. In the Description field, enter a description associated with the mapping.

4. In the remaining fields select the appropriate value from the LOV.

Note: The remaining fields in this window are derived from the seeded code associations. The titles of the fields enabled for data entry are replaced with the display titles associated with the selected code association. Values can only be entered in columns where the headings map1, map2, map3 etc. have been replaced by the display title. The field titles indicate the type of code required, and the lists of values contain the valid codes available.

5. Save your work.

Table 22–2 Maintain Code Mapping Window Description

Field Name	Type	Features	Description
Association Code	Required		Code name uniquely identifying a code mapping
Description	Display only		Code association description
Display Title	Display only		Title associated with association code
Description	Conditionally required		Description associated with each code mapping

Table 22–2 Maintain Code Mapping Window Description

Field Name	Type	Features	Description
Map 1	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map1 is replaced by the code display title if the field is required
Map 2	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map2 is replaced by the code display title if the field is required
Map 3	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map3 is replaced by the code display title if the field is required
Map 4	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map4 is replaced by the code display title if the field is required
Map 5	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map5 is replaced by the code display title if the field is required
Map 6	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map6 is replaced by the code display title if the field is required
Map 7	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map7 is replaced by the code display title if the field is required
Map 8	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map8 is replaced by the code display title if the field is required

Table 22–2 Maintain Code Mapping Window Description

Field Name	Type	Features	Description
Map 9	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map9 is replaced by the code display title if the field is required
Map 10	Conditionally required	List of values	Value of code mapped to as defined by association code The column heading map10 is replaced by the code display title if the field is required

22.4 Codes and Mappings

Some fields are common to all institutions and some fields only apply to particular types of institutions. The following sections define the codes and mappings and associated prerequisites that must be set up by different types of institutions.

22.4.1 Define HESA Reference Data Common to All Institutions

The following table describes HESA codes and code mappings that should be defined by all institutions.

Table 22–3 All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_CAMPUS	HESA Campus	OSS_HESA_LOC_CAMP_ASSOC	Location to HESA Campus	Locations IGSOR031
HESA_CLASS	HESA Degree Classification	OSS_HESA_HONOURS_ASSOC	Honours Level HESA Degree Classification	Honours Levels IGSGR005, Awards
HESA_COSTCN	HESA Cost Centre	OSS_HESA_COSTCN_ASSOC	Cost Centre Student System to HESA Codes	OSS_COSTCN

Table 22–3 All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_CRDTSCM	HESA Credit Transfer Scheme	OSS_HESA_CRDSTCM_ASSOC	Credit Transfer Scheme Student System to HESA Codes	OSS_CRDTSCM
HESA_DIS_ALLOW	HESA Disability Allowance	OSS_HESA_DIS_ALLOW_ASSOC	Disability Allowance Student System to HESA Codes	OSS_DIS_ALLOW
HESA_FEEBAND	HESA Fee Band	OSS_HESA_FEEBAND_ASSOC	Fee Band Student System to HESA Codes	OSS_FEEBAND
HESA_FEEELIG	HESA Fee Eligibility	OSS_HESA_FEEELIG_ASSOC	Fee Eligibility Student System to HESA Codes	OSS_FEEELIG
HESA_FRAN_ACT	HESA Franchising Activity	OSS_HESA_FRAN_ASSOC	Franchising Activity Student System to HESA Codes	OSS_FRAN_ACT
HESA_FUNDCODE	HESA Fundability Code	OSS_HESA_FUNDCODE_ASSOC	Fundability Code Student System to HESA Codes	OSS_FUND_CODE
HESA_HEENT	HESA New Entrant to HE Indicator	OSS_HESA_HEENT_ASSOC	New Entrant to HE Indicator Student System to HESA Codes	OSS_HEENT
HESA_LEVLCRD	HESA Level of Credit	OSS_HESA_LEVLCRD_ASSOC	Unit Level to HESA Level of Credit	Unit Level IGSPS04

Table 22–3 All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_LOCSDY	HESA Location of Study	OSS_HESA_LOCSDY_ASSOC	Location of Study Student System to HESA Codes	OSS_LOCSDY
HESA_MODE	HESA Mode of Study	OSS_HESA_MODE_ASSOC	Attendance Type to HESA Mode of Study Codes	OSS_MODE_TYPE
HESA_MSTUFEE	HESA Major Source of Tuition	OSS_HESA_MSTUFEE_ASSOC	Major Source of Tuition Fees Student System to HESA Codes	OSS_MSTUFEE
HESA_NHS_EMPLOYER	HESA NHS Employer	OSS_HESA_NHS_EMPLOY_ASSOC	NHS Employer Student System to HESA Codes	OSS_NHS_EMPLOYER
HESA_NHS_FUSRC	HESA NHS Funding Source	OSS_HESA_NHS_FUND_ASSOC	NHS Funding Source Student System to HESA Codes	OSS_NHS_FUSRC
HESA_PROPORTION	HESA Qualification Aim Proportion	OSS_HESA_PROPORTION_ASSOC	Qualification Aim Proportion Student System to HESA Codes	OSS_PROPORTION
HESA_QUALAIM	HESA Qualification Aim	OSS_HESA_AWD_ASSOC	Program Award and Student Program Attempt to HESA Qualification Aim code	Awards for Qualification aim and obtained IGSPS008

Table 22–3 All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_REG_BODY	HESA Department of Health Regulatory Body	OSS_HESA_REG_BODY_ASSOC	Program Reference Code - REGBODY to HESA Department of Health Regulatory Body	Reference Code Types IGSPS011 reference code types REGBODY
HESA_RSNLEAVE	HESA Reason for Leaving	OSS_HESA_RSNLEAVE_ASSOC	Discontinuation Reason to HESA Reason for Leaving	Discontinuation Reason IGSEN017
HESA_SPEC_STUD	HESA Special Student Indicator	OSS_HESA_SPEC_STUD_ASSOC	Special Student Indicator Student System to HESA Codes	OSS_SPEC_STUD
HESA_TTA	HESA Term Time Accommodation	OSS_HESA_TTA_ASSOC	Term Time Accommodation Student System to HESA Codes	OSS_TTA
HESA_TTCID	HESA Teacher Training Course Identifier	OSS_HESA_TTCID_ASSOC	Teacher Training Course Identifier Student System to HESA Codes	OSS_TTCID
HESA_TYPEYR	HESA Type of Program Year	OSS_HESA_TYPEYR_ASSOC	Type of Program Year Student System to HESA Codes	OSS_TYPEYR
HESA_UFI_PLACE	HESA UFI Place	OSS_HESA_UFI_ASSOC	UFI Place Student System to HESA Codes	OSS_UFI_PLACE

22.4.2 Define HESA Reference Data Specific to All English Institutions

The following table describes HESA codes and code mappings that should be defined by all English Institutions.

Table 22–4 All English Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_FESTUMK	HESA FE Student Marker	OSS_HESA_FESTUMK_ASSOC	FE Student Marker Student System to HESA	OSS_FESTUMK
HESA_FUNDCOMP	HESA completion of year of program	OSS_HESA_FUNDCOMP_ASSOC	Completion of year of program Student System to HESA codes	OSS_FUNDCOMP
HESA_PRG_OUT	HESA completion of year of program	OSS_HESA_PROG_OUCOME_ASSOC	Progression Outcome to HESA Program Completion	IGS lookups - lookup type progression status
HESA_FEPRMK	HESA FE Program Marker	OSS_HESA_FEPRMK_ASSOC	FE program marker, Student System to HESA	OSS_FEPRMK
HESA_FUNDLEV	HESA Level Applicable to Funding Council	OSS_HESA_FUNDLEV_ASSOC	Level Applicable to Funding Council Student System to HESA codes	OSS_FUNDLEV

22.4.3 Define HESA Reference Data Specific to English Institutions Reporting FE Students

The following table describes HESA codes and code mappings that should be defined by English Institutions reporting FE students.

Table 22–5 English Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_SUP_BAND	HESA Additional Support Band	OSS_HESA_SUP_BAND_ASSOC	Additional Support Band Student System to HESA	OSS_SUP_BAND
HESA_CSTAT	HESA Completion Status	OSS_HESA_CSTAT_ASSOC	Completion Status Student System to HESA codes	OSS_CSTAT
HESA_PROGRESS	HESA Good Standing Marker	OSS_HESA_PROGRESS_ASSOC	Good Standing Marker Student System to HESA codes	OSS_PROGRESS
HESA_FEQAIM	HESA FE Qualification Aim	OSS_HESA_FEQAIM_ASSOC	Program Award to HESA FE Qualification Aim	Awards IGSPS08
HESA_VLEVEL	HESA Vocational Level of Course	OSS_HESA_VLEVEL_ASSOC	Program Reference Type VOCATIONAL to HESA Vocational level of course	Reference Code Types IGSPS011 reference code types VOCATIONAL

Table 22–5 English Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_NONPAY	HESA Reason for Non Payment of Fees	OSS_HESA_NONPAY_ASSOC	Reason for Non Payment of Fees Student System to HESA codes	OSS_NONPAY

22.4.4 Define HESA Reference Data Specific to English Institutions Reporting Teacher Training Students

The following table describes HESA codes and code mappings that should be defined by English Institutions reporting teacher training students.

Table 22–6 English Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ITTPHSC	HESA ITT phase/scope	OSS_HESA_ITTPHSC_ASSOC	ITT phase/scope Student System to HESA codes	OSS_ITTPHSC
HESA_OUTCOME	HESA ITT Outcome	OSS_HESA_OUTCOME_ASSOC	ITT Outcome Student System to HESA Codes	OSS_OUTCOME

22.4.5 Define HESA Reference Data Specific to Welsh Institutions

The following table describes HESA codes and code mappings that should be defined by all Welsh Institutions.

Table 22–7 All Welsh Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_FESTUMK	HESA FE Student Marker	OSS_HESA_FESTUMK_ASSOC	FE Student Marker Student System to HESA	OSS_FESTUMK
HESA_FUNDCOMP	HESA completion of year of program	OSS_HESA_FUNDCOMP_ASSOC	Completion of year of program Student System to HESA codes	OSS_FUNDCOMP
HESA_PRG_OUT	HESA completion of year of program	OSS_HESA_PROG_OUTCOME_ASSOC	Progression Outcome to HESA Program Completion	IGS lookups - lookup type progression status
HESA_FEPRMK	HESA FE Program Marker	OSS_HESA_FEPRMK_ASSOC	FE program marker, Student System to HESA	OSS_FEPRMK

22.4.6 Define HESA Reference Data Specific to Welsh Institutions Reporting FE Students

The following table describes HESA codes and code mappings that should be defined by Welsh Institutions reporting FE students.

Table 22–8 Welsh Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ST13	HESA SLDD - Discrete provision	OSS_HESA_ST13_ASSOC	SLDD Discrete Provision, Student System to HESA codes	OSS_ST13
HESA_CSTAT	HESA Completion Status	OSS_HESA_CSTAT_ASSOC	Completion Status Student System to HESA codes	OSS_CSTAT
HESA_PROGRESS	HESA Good Standing Marker	OSS_HESA_PROGRESS_ASSOC	Good Standing Marker Student System to HESA codes	OSS_PROGRESS
HESA_FEQAIM	HESA FE Qualification Aim	OSS_HESA_FEQAIM_ASSOC	Program Award to HESA FE Qualification Aim	Awards IGSPS08
HESA_VLEVEL	HESA Vocational Level of Course	OSS_HESA_VLEVEL_ASSOC	Program Reference Type VOCATIONAL to HESA Vocational level of course	Reference Code Types IGSPS011 reference code types VOCATIONAL

Table 22–8 Welsh Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_NONPAY	HESA Reason for Non Payment of Fees	OSS_HESA_NONPAY_ASSOC	Reason for Non Payment of Fees Student System to HESA codes	OSS_NONPAY
HESA_DEST	HESA destination values	OSS_HESA_DESTIN_ASSOC	Destination Student System to HESA codes	OSS_DEST

22.4.7 Define HESA Reference Data Specific to Welsh Institutions Reporting Teacher Training Students

The following table describes HESA codes and code mappings that should be defined by Welsh Institutions reporting teacher training students.

Table 22–9 Welsh Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ITTPHSC	HESA ITT phase/scope	OSS_HESA_ITTDHSC_ASSOC	ITT phase / scope Student System to HESA codes	OSS_ITTPHSC
HESA_OUTCOME	HESA ITT Outcome	OSS_HESA_OUTCOME_ASSOC	ITT outcome Student System to HESA codes	OSS_OUTCOME
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM

22.4.8 Define HESA Reference Data Specific to Northern Irish Institutions

The following HESA codes and code mappings should be defined by all Northern Irish Institutions.

Table 22–10 All Northern Irish Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_RELIG	HESA Religion	OSS_HESA_RELIG_ASSOC	Person Religion to HESA Religion	IGS lookups person religion
HESA_FUNDLEV	HESA Level Applicable to Funding Council	OSS_HESA_FUNDLEV_ASSOC	Level Applicable to Funding Council Student System to HESA codes	OSS_FUNDLEV
HESA_PRG_OUT	HESA Completion of Year of Program	OSS_HESA_FUNDCOMP_ASSOC	Completion of Year of Program Student System to HESA codes	OSS_FUNDCOMP

22.4.9 Define HESA Reference Data Specific to Northern Irish Institutions Reporting Teacher Training Students

The following HESA codes and code mappings should be defined by Northern Irish Institutions reporting teacher training students.

Table 22–11 All Northern Irish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM

Table 22–11 All Northern Irish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_TQSEC	HESA Teaching Qualification Sought/Gained Sector	OSS_HESA_TQSEC_ASSOC	Teaching Qualification Sought/Gained Sector Student System to HESA codes	OSS_TQSEC

22.4.10 Define HESA Reference Data Specific to Scottish Institutions Reporting Teacher Training Students

The following HESA codes and code mappings should be defined by Scottish Institutions reporting teacher training students.

Table 22–12 Scottish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM
HESA_TQSEC	HESA Teaching Qualification Sought/Gained Sector	OSS_HESA_TQSEC_ASSOC	Teaching Qualification Sought/Gained Sector Student System to HESA codes	OSS_TQSEC
HESA_TQSUB123	HESA Teacher Qualification Sought/Gained Subject	OSS_HESA_TQSUB123_ASSOC	Teaching Qualification Sought/Gained Subject Student System to HESA Codes	OSS_TQSUB123

22.5 Map UCAS, Oracle Student System, and HESA Reference Data

The applicant data imported from UCAS is coded using standard UCAS reference codes, when the data is imported to Oracle Student System and person records are created these codes must be converted to Oracle Student System reference codes. If this data is later reported to HESA the Oracle Student System reference codes must also be mapped to HESA reference codes. Some UCAS data is coded but there is no UCAS reference data provided for these codes so these must first be defined along with the HESA reference codes using the HESA Setup Maintain Codes Window.

The following codes must be defined:

- UCAS_SOC, UCAS Social Class Indicator
- UCAS_GEN, UCAS Gender

The following table describes UCAS, HESA codes, and Code mappings that should be defined.

Table 22–13 UCAS, HESA Codes, and Code Mappings

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_DOM	HESA Domicile	UC_OSS_HE_DOM_ASSOC	Domicile	OSS_DOM, UCAS reference data - Domicile
HESA_ETHNICITY	HESA Ethnicity	UC_OSS_HE_ETH_ASSOC	Ethnicity	IGS Lookups - ethnicity and UCAS reference data Ethnicity
HESA_OCC	HESA Parental Occupation Codes	UC_OSS_HE_OCC_ASSOC	Occupation Codes	OSS_OCC, UCAS reference data - Occupation Codes
HESA_SOC	HESA Socio Economic Indicator	UC_OSS_HE_SOC_ASSOC	Social Class	OSS_OCC, UCAS_SOC
HESA_GENDER	HESA Gender	UC_OSS_HE_GEN_ASSOC	Gender	IGS Lookups - type Sex
HESA_NAT	HESA Nationality	UC_OSS_HE_NAT_ASSOC	Nationality	UCAS reference codes - Domicile and FND territories
HESA_DIS	HESA Disability	UC_OSS_HE_DIS_ASSOC		UCAS reference codes - Disability and person special needs

22.6 Define Reference Data for deriving HESA Combined and Student return fields 76 and 77 PGCESBJ and PGCECLSS

HESA requires that the classification of the first degree is returned for Postgraduate Certificate of Education (PGCE) students. To derive this information, the HESA extraction process needs to know which awards held in Oracle Student System can be awarded as first degrees. This is done by defining the code values for the code OSS_QUAL_1ST_DEGREE in the HESA Maintain Codes window. Each Oracle Student System award awarded as a first degree should be added to this set of reference codes.

Prerequisites

Program Awards IGSPS008 and associated grading schema IGSAS025

Note: The awards need to be defined with System Award Type of Program.

Responsibility

Oracle Student System Super User

Navigation

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for navigation information.

Steps

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for steps information.

22.7 Define Reference Data for deriving HESA Combined and Student return field 66 FEEELIG

If the fee eligibility is not entered directly for a student at the student unit set attempt HESA details level it is derived using the special student indicator, the FE student marker, the mode of student and the fee category. This is done using the following code mappings:

- OSS_FEECAT_FEEELIG_ASSOC – which maps the Oracle Student System fee category codes to the Oracle Student System fee eligibility codes
- OSS_FESTUMK_FEEELIG_ASSOC – which maps the Oracle Student System FE student marker codes to the Oracle Student System fee eligibility codes

- `OSS_MODE_FEEELIG_ASSOC` – which maps the Oracle Student System mode of study codes to the Oracle Student System fee eligibility codes
- `OSS_SPCSTU_FEEELIG_ASSOC` – which maps the Oracle Student System fee eligibility to the Oracle Student System fee eligibility codes

The mappings are maintained in the Maintain Code Mappings window.

Prerequisites

Maintain Codes IGSHE001 - `OSS_FEEELIG`, `OSS_FESTUMK`, `OSS_MODE_TYPE`, `OSS_SPCSTU`

Responsibility

Oracle Student System Super User

Navigation

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for navigation information.

Steps

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for steps information.

22.8 Define Reference Data for deriving HESA Combined and Student return field 31 TTACCOM

If the student term time accommodation indicator is not entered directly for the student at the student unit set attempt HESA details level it is derived from the location of study or the term time address. This is done using the HESA code mappings `OSS_ADDRUS_TTA_ASSOC` and `OSS_TTA_LOCSDY_ASSOC` which are maintained in the HESA Maintain Code Mappings Form. The mapping `OSS_TTA_LOCSDY_ASSOC` maps the Oracle Student System location of study codes to the Oracle Student System term-time accommodation codes which allows institutions to map the location of study codes used to indicate that the student is abroad for a year to the appropriate term time accommodation codes.

To derive the term-time accommodation indicator from the term-time addresses the address usages that are used for term type, addresses must be defined on the HESA Maintain Codes window for code `TERM_TIME_ADDR`, the values entered must be the party site codes. The mapping `OSS_ADDRUS_TTA_ASSOC` allows institutions to map the party site codes to Oracle Student System term time accommodation codes.

Prerequisites

Maintain Codes IGSHE001 - OSS_TTA, OSS_LOCS DY

Responsibility

Oracle Student System Super User

Navigation

See Define HESA Reference Codes for navigation information.

Steps

See Define HESA Reference Codes for steps information.

22.9 Define Reference Data for deriving HESA module return field 6 FTE

If a Module return is submitted to HESA the unit FTE is derived using the enrolled credit points and the unit level. To derive the unit FTE the HESA calculation needs to know the annual credit points that a student is expected to study at that level. This requires that the annual credit is defined using the HESA Maintain Codes window for the reference code ANNUAL_CREDIT and that the annual credit and unit level are mapped using the HESA Maintain Code Mappings window using the code association LEVEL_ANNUAL_CREDIT_ASSOC

Prerequisites

Unit Level IGSPS043

Responsibility

Oracle Student System Super User

Navigation

See Define Mapping Between HESA Reference Codes and Oracle Student System Codes for navigation information.

Steps

See Define Mapping Between HESA Reference Codes and Oracle Student System Codes for steps information.

22.10 Define Reference Data for deriving HESA Combined and Student return field 65 FUNDCODE

To derive the HESA field 65 FUNDCODE the HESA extraction process needs to identify overseas students. The person residency status associated with the residency class used to calculate tuition fees, the value of the profile option IGS: Residency Class, is used to identify these students. This is done by assigning the Oracle Student System person residency status codes assigned to overseas students to the code set OSS_RESIDENCY_OSS in the HESA Maintain Codes window.

The extraction process also looks at the student's major source of funding to determine whether they are funded by a funding council. Therefore a mapping is required between them. This is done by setting up a mapping OSS_MSFUND_FUNDCODE_ASSOC between the Oracle Student System major source of funding codes and Oracle Student System fundability codes.

Prerequisites

Lookups FNDLVMLU - Person Residency Status

Funding Source IGSPS010

Maintain Codes IGSHE01 – OSS_FUND_CODE

Responsibility

Oracle Student System Super User

Navigation

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for navigation information.

Steps

See Define HESA Reference Codes and Define Mapping Between HESA Reference Codes and Oracle Student System Codes for steps information.

22.11 Identify Highest Qualification on Entry Grading Schema

The UCAS tariff calculation process calculates the highest qualification on entry for return to HESA. The HESA highest qualification on entry codes are defined as a grading schema which is associated with the qualification schemas used for recording entry qualifications using the grade translation. The calculation process needs to know which of the grading schema defined applies to the highest qualification on entry. This is done by assigning the grading schema code to the

reference codes HESA_HIGH_QUAL_ON_ENT in the HESA Maintain Codes window.

Prerequisites

Grading Schema IGSAS025 to represent the HESA highest qualification on entry

Awards IGSPS008 and associated Grading Schema IGSAS025 to represent the entry qualifications

Note: The System Award Type can be either Program or Entry Qualification

Grade translation IGSAS026 between the entry qualification and highest qualification on entry grading schema

Responsibility

Oracle Student System Super User

Navigation

See Define HESA Reference Codes for navigation information.

Steps

See Define HESA Reference Codes for steps information.

22.12 Setting Up UCAS Tariff Calculation

Note: This information will be moved to the *Oracle Student System for the United Kingdom User's Guide* in July, 2003.

Use the UCAS Tariff Calculation Setup window to define a UCAS tariff calculation and the qualifications to be considered when calculating the tariff.

In this window, you can:

- view the UCAS calculation type details and maintain the associated the tariff levels to be calculated
- define the OSS awards that contribute to a particular tariff level
- define the parent awards so that lower level qualifications in the same subject can be discounted when calculating the UCAS tariff

The UCAS tariff assigned to each qualification result is held as the grading schema grade rank field.

The Parent Awards tab allows you to define for a UCAS tariff calculation type the parent awards associated with awards that counts towards the UCAS tariff. This information is required so that lower level qualifications in the same subject can be discounted from the UCAS tariff calculation.

Prerequisites

The profile option IGS: COUNTRY CODE must be set to GB: United Kingdom.

Qualifications entered in the Previous Education Details window must be defined as Oracle Student System awards with associated grading schemas.

Responsibility

Oracle Student System Super User

Navigation

HESA Returns -> HESA Setup -> UCAS Tariff Calculation Setup

UCAS Interface -> UCAS Setup -> UCAS Tariff Calculation Setup

Steps

Enter data in each field of the window as described in the table.

Table 22–14 UCAS Tariff Calculation Setup Window Description

Field Name	Type	Features	Description
UCAS Tariff Calculation Type	Required		Code identifying the calculation type
[Description]	Display only		Calculation type description
External Calculation	Optional	Check box	Checkbox that indicates whether the calculation is used to calculate the External UCAS tariff for reporting to HESA
Closed	Optional		Check box that indicates that this is the calculation type is now closed and is not to be used in future calculations
Award		Button	Takes you to the Tariff Level Award window in which you enter the awards associated with the tariff level
Tariff Levels Tab			

Table 22–14 UCAS Tariff Calculation Setup Window Description

Field Name	Type	Features	Description
Tariff Level	Required	List of values	The HESA tariff level reporting code which identifies the levels of the UCAS tariff to be reported to HESA Valid values include values in FND lookup type IGS_HE_TARIFF_LEVELS
Description	Display only		Text field that describes the HESA tariff levels
Closed	Optional	Check box	Checkbox that indicates the tariff level is no longer to be calculates for this calculation type
Parent Awards Tab			
Award	Required	List of values	The Oracle Student System award code of an award which is included in the tariff qualification and is to be excluded if an award in the same subject but at a higher level exists for the student Value entered must be an award associated with a tariff level for the calculation
Description	Display only		Title of the award
Parent Award	Required	List of values	The code of a higher level award Value entered must be an award associated with a tariff level for the calculation
Description	Display only		Title of the parent award
Closed	Optional	Check box	Checkbox that indicates the parent award/award relationship is no longer to be considered for this calculation type

Guidelines

One award can only be the parent of one award.

One award cannot be parent of itself.

One award can only have one parent.

22.12.1 Setting Up UCAS Tariff Calculation Awards

The UCAS Tariff Calculation Awards window enables you to associate Oracle Student System awards with the UCAS tariff calculation levels. The window is only accessible from the Awards button on the UCAS tariff levels tab of the UCAS tariff setup form.

The calculation type and tariff level are display only and populated automatically on entry to the form.

Prerequisites

The profile option IGS: COUNTRY CODE must be set to GB: United Kingdom.

Qualifications entered in the Previous Education Details window must be defined as Oracle Student System awards with associated grading schemas.

Responsibility

Oracle Student System Super User

Navigation

HESA Returns -> HESA Setup -> UCAS Tariff Calculation Setup window > Awards button

UCAS Interface -> UCAS Setup -> UCAS Tariff Calculation Setup > Awards button

Steps

Enter data in each field of the window as described in the table..

Table 22–15 UCAS Tariff Calculation Setup Window Description

Field Name	Type	Features	Description
UCAS Tariff Calculation Type	Display only		Code identifying the calculation type Imported from UCAS Tariff Calculation Setup window, Tariff Levels tab
[Description]	Display only		Calculation type description Imported from UCAS Tariff Calculation Setup window, Tariff Levels tab
External Calculation	Optional	Check box	If selected, indicates external calculation
Tariff Level	Display only		The UCAS tariff level reporting code Imported from UCAS Tariff Calculation Setup window, Tariff Levels tab
[Description]	Display only		Text field that describes the HESA tariff level Description associated with the tariff level from FND lookups with lookup type IGS_HE_TARIFF_LEVELS
Award	Required	List of values	Code identifying the Oracle Student System award Value entered must be current award
Title	Display only		Text field that describes the Oracle Student System Award
Default	Required	Check box	Checkbox that indicates the default award if more than one award is mapped to the level
Closed	Required	Check box	Checkbox that indicates the award is no longer associated with this calculation type

Guidelines

New user defined calculation types can be defined. After the calculation type is closed, you cannot modify any data associated with this calculation type.

For a calculation type, an award can be a parent to only one child award. Similarly, a child can have only one parent award.

Each tariff level has a default award associated with it. After the award associated with the tariff level is closed, that award can be associated with the other tariff level.

An award can only be assigned one tariff level.

One award must be indicated as the default award for each tariff level.

Modifying and Adding Rules

23.1 Rules Overview

Rules syntax includes operators, parameters, functions, and variables for the creation of rules.

Rules windows can be accessed from several windows in different subsystems and are dynamically configured. The following information varies depending on how the Rules windows are accessed:

- available rules
- field names
- available logical operators, such as +, -, and, or, ()
- available parameters and functions, such as adm_appl_status, sex
- available variables, such as 0 to 9, A to Z, %, unit codes, unit set codes

23.1.1 Terminology

The following table describes rules terminology.

Term	Definition
general rules	a group of rules that can be called by other rules and can be defined uniquely by the rule description and return type. General rules can be viewed in the Rule window.
specific rule	a rule that must be considered in context because it is assigned to particular data elements of Oracle Student System. For example, unit version rules are assigned to particular unit codes and version numbers.

Term	Definition
return type	type of result a rule can return, such as STRING, BOOLEAN, and SET
operators	symbols or text representing functionality. Examples include +, -, and AND.
parameters	data items and their values. For example, the parameter Sex has values of FEMALE, MALE, and UNKNOWN.
functions	allowable range of rules that can be called by other rules. In general, parameters and functions are the same because functions or other rules often return values to the calling rule.
variables	characters used to represent variables. For example, the numbers 0 through 9 can be used to represent numeric variables.

Each institution determines how rules functionality is applied to its business practices. Nonspecialist functions are usually limited to modifying rules that have a return type of STRING.

The remaining functionality, typically used by subsystem specialists or system administrators, includes the following rules:

- creating and modifying rules
- deleting rules

23.2 Modifying Seeded Rules

You can update the seeded Student System rules. Examples of seeded rules include finance rules, GPA rules, and financial aid rules.

The description and rule text for general seeded rules can be edited or deleted by a specialist user.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Group Rules > Group Rules Window

Query the appropriate record.

Click **Edit Rule**.

The Rule window appears.

Steps

1. Click **Options/Validate** to display all logical operators, parameters, functions, variables, rules, instructions for entering variables, successful messages, or unsuccessful messages in the Rule Options region.

Instructions appear with three asterisks (***) before and after the instruction.

2. In the Rule Text tab, revise rule text.
3. Click **Options/Validate** to validate the rule text.

Note: If there is any Invalid rule text, it appears in the Unprocessed field.

4. Correct invalid rule text.
5. Click **Options/Validate** to revalidate rule text.

Note: If a rule is invalid, the text that fails to meet the rules syntax logic is removed from the Rule Text tab and inserted in the Unprocessed field. After corrections are made to the text in the Unprocessed field or Rule Text tab, if the logic is correct, the text is reinserted.

6. Optionally, in the Comments tab, enter comments related to the rule.
7. Save your work.

The rule text is validated. If the rule fails, it is not saved.

8. Close the window.

23.2.1 Guidelines

Rule descriptions must be unique and cannot include the number or pound (#) character.

When clicking the button beside a rule operator, parameter, function, or rule, a space must be entered in the Rule Text tab.

Only valid rules can be saved and only rules that are not called by other rules can be deleted.

The variables displayed include unit codes and unit set codes only. When users enter the first part of a variable and click **Options/Validate**, a list of variables that start with the entered text appears. If the number of returned variables is large, a message appears to enter more text. When the list of variables appears in the Rule Option region, the entered text appears in the Unprocessed field and must be deleted manually.

23.3 Adding Rules

New rules must be added in the context of a rule group or subgroup. New general rules must be added in the context of a particular group or subgroup in the Group Rules window.

Rules are organized into groups and subgroups. Subgroups determine hierarchy within rule groups that enables logical grouping and branches to be created for rules.

Specific rules must be considered in the context of a specific window. For example, unit version rules must be attached to a specific unit code and version in the Program Version Rules window or the Program Stages window. For these rules, a specialist user cannot define the rule description, but can define the rule text in the Group Rules window.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Setups > Group Rules > Group Rules Window

Query the appropriate record.

Note: Queries can be performed in the Rule Group region or the Rule Subgroup.

Select the appropriate rule group or subgroup by clicking on the value in the Rule Group or Rule Subgroup fields.

Click **Add Rule**.

The Rule window appears.

Steps

1. In the Rule Description, enter a short description for your new rule.
2. Click **Options/Validate** to display all logical operators, parameters, functions, variables, rules, instructions for entering variables, successful messages, or unsuccessful messages in the Rule Options region.
3. Create rule text.
4. Click **Options/Validate** to validate rule text.

Note: If a rule is invalid, the text that fails to meet the rules syntax logic is removed from the Rule Text tab and inserted in the Unprocessed field. After corrections are made to the text in the Unprocessed field or Rule Text tab, if the logic is correct, the text is reinserted.

5. Correct any invalid text.
6. Save your work.

Correspondence

24.1 Correspondence Overview

Correspondence functionality uses Admission and Financial Aid module processes and technology together with Oracle Customer Relationship Management (CRM) products and technology to facilitate the creation of correspondence items.

CRM Foundation modules, specifically CRM 1-1 Fulfillment and Interaction History, provide features and tools to setup and dispatch correspondence items. Institutions of Higher Education needs to reach out to prospective Student and Current Student The purpose of this document is describe the current functionality and future direction for Correspondence integrating with 1-1 fulfillment server and Interaction History modules.

The correspondence system facilitates dissemination of correspondence items to students using an appropriate mode of communication. Oracle Student System provides an integrated correspondence system using CRM products and technology. Specifically, CRM Foundation modules, such as CRM 1-1 Fulfillment and Interaction History, provide features and tools to setup and dispatch correspondence items to designated recipients. These correspondence items are system generated letters and ad-hoc letters.

The enhancements to the Correspondence System provide additional attributes and letter processing capabilities to the existing functionality.

- Enhancement to the OSS Interaction History to include the Fulfillment Sent Date along with the Date Submitted by the concurrent process.
- Enhancement to the defined Correspondence concurrent processes that will provide the ability to detect Holds.

Documents

Documents sent to students are created in CRM using master documents and SQL statements. A master document contains text that is used repeatedly. Users can create master documents using word processing tools. Master documents are uploaded into CRM 1-1 Fulfillment as html documents.

Each document is mapped to a concurrent process run in Student System.

Master Documents

A basic document in CRM Fulfillment is made up of a master document. A simple master document consists of plain static text. Users can define complex documents by including text placeholders in the document. These placeholders are replaced by data or information extracted from OSS tables through a SQL query defined in CRM 1-1 Fulfillment and attached to master documents.

A SQL query is a statement that collects specific data from the database when fulfilling a request to dispatch a master document.

A master document can be a template or ad hoc.

A template is a pre-defined package of master documents, brochures, newsletters, prospectus, or other customer-oriented information.

An ad hoc document can be created easily by defining a master document and associating the appropriate SQL statement to the document.

Note: Master documents defined in CRM are mapped to system letter codes in the Mapping and Attributes window in Student System.

Correspondence Placeholders

Some windows in other subsystems in Student System require placeholder information that does not impact the Correspondence subsystem or CRM setup. This placeholder information includes the following:

- Setting Up Correspondence Types
- Setting Up Correspondence Categories

24.1.1 Setting Up Correspondence Types

Correspondence types are institution-defined types of correspondence. Correspondence types can be associated with the output from concurrent manager processes. For example, a correspondence of type acknowledgement letter can be associated with a concurrent manager process that formats and produces a system

letter. More than one correspondence type can be associated with a concurrent manager process and vice-versa.

Oracle Student System uses correspondence types to determine which correspondence items are sent to a student. Oracle Student System verifies that a student's correspondence category is associated with a correspondence type attached to the concurrent manager process.

Prerequisites

CRM Fulfillment must be installed.

The following profile options must be set: IGS: Fulfillment Server ID and IGS: CRM User ID.

Responsibility

Oracle Student System Super User

Navigation

Correspondence > Correspondence Types window

Steps

1. In the Correspondence Type field, enter the name of a correspondence type.
2. In the Description field, enter a Description of the correspondence type.
3. Optionally, to prevent further use of a correspondence type, select the Closed check box.
4. Optionally, in the Concurrent Manager Process region, select a formatting output process.
5. Save or save and continue as follows:

File > Save or Save and Proceed

Guidelines

Correspondence types can be closed, but they cannot be deleted if they have any correspondence generated.

24.1.2 Setting Up Correspondence Categories

Correspondence categories are institution-defined groups of correspondence items. Correspondence categories group the correspondence items that can be sent to a particular student. For example, students in correspondence category STANDARD

are sent a defined set of correspondence, while students in the correspondence category COMMERCIAL are sent a different set of correspondence that omits an enrollment form. Correspondence categories are assigned to individual student program attempts in the Admissions subsystem.

The correspondence category procedure associates a correspondence category with one or more correspondence types.

A student receives correspondence when Student System determines that a correspondence type related to a concurrent manager process is also related to the student's program attempts correspondence category.

Correspondence categories are established when Student System is set up. New correspondence categories can be created using the maintain correspondence categories procedure.

Note: The creation of new correspondence categories is an infrequent event that can provide for a new cohort of students with nonstandard needs. For example, a new commercial client might require the creation of a new correspondence category.

The following information applies to this procedure:

- Only one item of a current correspondence type can be associated with a correspondence category at any time. To associate a second item of a correspondence type with the correspondence category, the user must enter a deletion date for the first item.
- The Creation Date field defaults to the date on which the correspondence type is associated with the correspondence category.
- The System Generated check box is checked if the correspondence is to be generated by the correspondence engine.
- Correspondence categories can be closed, but they cannot be deleted if they are associated with any correspondence types.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Correspondence - Correspondence Category window

Steps

1. In the Correspondence Category field, enter the name of a correspondence category.
2. In the Description field, enter a description of the correspondence category.
3. In the Correspondence Type field, select a correspondence type from the list of values.
4. Optionally, to prevent further use of a correspondence category, select the Closed check box.
5. Optionally, to view all deleted items for the correspondence category, select the Include Deleted Items check box and repeat the query.
6. Optionally, to stop issuing correspondence items of a particular correspondence type to students who are held, select the Block When Held check box beside that correspondence type.
7. Save or save and continue as follows:
File - Save or Save and Proceed
8. Close the window.

24.1.3 Setting Up Mapping and Attributes

The master documents used for correspondence and the recipient list are created in CRM. Mapping of master documents and assigning attributes to them is part of the OSS > CRM integration correspondence process. The Master documents defined in CRM are mapped to system letter codes in Oracle Student System (OSS). The document types can be system letter or ad hoc. When a concurrent process is run, this mapping of the documents helps the system to display only those documents belonging to the specified system letter code in the concurrent process parameter window.

Users can also assign attributes to these documents. For example, attributes like number of times a letter can be sent, and elapsed days before which users can resend the letter.

Prerequisites

None

Responsibility

Oracle Student System Super User

Navigation

Correspondence > Correspondence Mapping > Mapping and Attributes window

Steps

Enter data in each field of the window as described in the table. Save your work.

Table 24–1 Mapping and Attributes Window Description

Field Name	Type	Features	Description
Mapping Type	Required	List of values	Master document or a list of people to whom correspondence is sent Note: If mapping type is List, users cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.
Document Type	Required	List of values	System letter or ad hoc letter System letters can be acknowledgement letters, rejection letters with a student recipient list attached. Ad hoc letters can be brochures, newsletters, prospectus, or other customer-related information.
Document/List Name	Required	List of values	Document or recipient list name created in CRM Note: If mapping type is document, list of values displays only document names. If mapping type is list, list of values displays only recipient list names.
Closed	Optional	Check box	If selected, prevents further use of document or list
Document/List Description	Display only		Description of document or list
System Letter Code	Required	List of values	OSS system letter code to which document is mapped. Note: If system letter code is Financial Aid type, users cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.
[Description]	Display only		System letter code description
Mapping Description	Optional		Description of mapping; useful when, for example, users want to differentiate between two acknowledgement letters
Attributes Region			

Table 24–1 Mapping and Attributes Window Description

Field Name	Type	Features	Description
Elapsed Days	Optional		Number of elapsed days before which users can resend the document; disabled for List mapping and Financial Aid letter mapping Note: Users can override the number of elapsed days if the Override Flag in the concurrent process is selected as Yes.
Number of Repeats	Optional		Number of times users can resend the document
Description	Optional		Attribute description

Setup for Legacy Data Import

Legacy data refers to data applicable to Oracle Student System that currently resides in another system or data-source and needs to be imported.

The legacy import interfaces allow institutions to import legacy data in bulk in the following areas:

- Program Structure and Planning
- Enrollments
- Academic Records

Enrollments and Academic Records use a common import interface while Program Structure and Planning has its own interface for import.

Student System provides interface tables that allows institutions to upload legacy data and execute a concurrent process in order to import legacy records.

Institutions are expected to map their data to Student System data structures offline and the upload the results to the interface tables. Institutions choose data to be uploaded into one or more of the available interface table.

25.1 Minimum Requirements

Calendars

At minimum, you need to enter the following calendars:

- academic
- load (academic term)
- teaching

- graduation (if you enter graduands)

for each academic period that you want to load data.

These calendars can be minimal. The only global mandatory date alias is the census date within each teaching period.

Calendars such as assessments, examination, enrollment, fee, and finance are not required.

If you use progression outcome upload, you will need to enter progression calendars and the basic progression processing dates to support the application of resulting effects.

Institutions

Institutions must perform all mapping activities between their legacy system and the interface table structures prior to uploading data.

You must be able to populate the interface tables using ad-hoc tools, and then query back the resulting error/message codes.

You also may run the person import process to be able to enter person information for all types of people including students, faculty, and staff.

This could also be keyed or data-loaded as an alternative.

25.2 Minimum Requirements for PSP

Calendar setup steps have been performed.

Teaching calendars have been created for all periods in which unit sections are being imported.

Person setup steps have been performed for required staff members. An example of a required staff member is unit contact staff member.

All parent data for the unit data such as teaching calendars, campuses, institutions, and organizational units must have been loaded or manually entered as outlined in the following sections.

Import of Unit Version Data Minimum Setup

Unit statuses must exist.

Unit levels must exist.

Unit internal course levels must exist.

Unit repeat families must exist.

Unit types must exist.

Owning organizations must exist as organizational units.

Coordinators must exist as staff members (staff person type).

Last enrolled and last offered periods must exist as load (academic terms) calendars, be active, and have unique alternate codes.

Flexfield definitions must have been established prior to import.

Unit subtitle IDs must exist in the system.

Import of Teaching Responsibility Data Minimum Setup

Unit versions must exist (these may be imported in the same run).

Organizational units must exist.

Import of Unit Discipline Data Minimum Setup

Unit versions must exist (these may be imported in the same run).

Discipline group codes must exist.

Import of Grading Schema Data Minimum Setup

Unit versions must exist (these may be imported in the same run).

Grading schemas must exist.

Import of Unit Section Data Minimum Setup

Unit versions must exist (these may be imported in the same run).

Calendars must exist as teaching calendars and must be in an active status.

Alternate codes must have been defined and must be unique.

Locations must exist.

Unit class codes must exist.

Subtitles must exist if you plan to enter subtitle information.

Unit contacts must exist as staff members (staff person type).

If you want to generate call numbers, then the IGS: Call Number For Unit Section profile option must be set appropriately to import.

Flexfield definitions must have been established prior to import.

Import of Unit Section Grading Schema Data Minimum Setup

Unit sections must exist (these may be imported in the same run).

Grading schemas must exist

Import of Unit Section Occurrences Minimum Setup

Unit sections must exist (these may be imported in the same run).

Buildings must have been created for all buildings, preferred buildings, and dedicated buildings.

Rooms must have been created for all rooms, preferred rooms, and dedicated rooms.

Flexfield definitions must have been established prior to import.

Import of Unit Reference Code Data Minimum Setup

Depending on the level of the reference code, unit versions, unit sections, or unit section occurrences must exist (these may be imported in the same run).

Unit reference codes must exist.

25.3 Minimum Requirements for Enrollments

Enrollment setup steps have been performed.

Program Structure & Planning elements (programs, unit sets, and units) must have been created, along with offerings in the appropriate calendar periods covering the data being loaded.

Person details must have already been loaded, either manually or using the admissions import process.

Import Student Program Attempt Minimum Setup

The IGS: Career Model Enabled profile option must be set correctly prior to the loading of program attempts to ensure correct setting of the primary program attributes.

The student must already exist as a person.

Statuses of program versions being uploaded must map to a seeded value of ACTIVE or INACTIVE.

Program offering options must exist matching attempts being imported.

Academic or load calendar instances must exist representing any imported catalog years/academic terms.

Dependent reference lookup information must be set up, including:

- discontinuation reason codes
- funding sources
- examination location codes
- nominated completion periods
- correspondence categories
- class standings
- fee categories

If specified, admission application must have already been imported.

Flexfield definitions must have been established prior to import.

Research candidature information must have been set up:

- program version of the student belongs to a program type that is defined as a research program
- government type of activity lookup codes must have been set up

Import Student Unit Set (Concentration) Attempts Minimum Setup

Student program attempt must have been imported for the student (may be imported in the same run).

Statuses of unit set versions being uploaded must map to a seeded value of ACTIVE or INACTIVE.

Unit set versions must have been mapped to the program offering options of the attempting students.

Unit set hierarchies must have been established for cases where parent/child relationships between attempts are required.

Authorizers must exist as staff members (staff person type).

Academic or load calendar instances must exist representing imported catalog years/academic terms.

The Pre-Enrollment Year profile option must be set according to planned setup.

Flexfield definitions must have been established prior to import.

Import Student Unit Attempts Minimum Setup

Student program attempt must have been imported for the student (may be imported in the same run).

Unit sections must have been imported that correspond to all unit enrollments.

(**Note:** The prerequisites to unit section, such as all teaching calendar instances, will also need to be satisfied.) See PSP setup for more information.

Unique alternate codes must have been set up against all imported teaching calendar instances.

If research units are being loaded, then

- research candidature must have been imported (or in the same run)
- research supervision must have been imported (or in the same run)

If unit attempts are being transferred, then original source unit attempt is loaded in the same import or a prior import.

If graded unit attempts are being loaded, but without the grading schema specified, then the unit version / section default grading schemas must exist.

Incomplete grades must exist within the unit version/section default grading schema.

Census dates (date aliases) must have been established in all teaching periods having legacy units imported.

Discontinuation grades must be established against administrative unit statuses being used for importing discontinued unit attempts.

Dependent reference lookup information must have been set up, including:

- administrative unit statuses
- discontinuation reason codes with unit flag set

Flexfield definitions must have been established prior to import.

Input Student Intermission Minimum Setup

Student program attempt must have been imported for the student (may be imported in the same run).

Approving persons must exist as staff members (staff person type).

Dependent reference lookup information must have been set up, including:

- intermission types (with approval details set correctly)

Flexfield definitions must have been established prior to import.

Input Student Award Aims Minimum Setup (UK institutions only)

Student program attempt must have been imported for the student (may be imported in the same run).

Awards must exist as valid for the program versions of students being imported.

Honors levels must exist.

Import Research Thesis and Thesis Examination Detail Minimum Setup

Student program attempt must have been imported for the student (may be imported in the same run).

Research candidature detail must have been imported for the student (may be imported in the same run).

Thesis result codes must have been set up to support both final thesis results and thesis examination results.

Thesis examination type reference codes must have been setup.

Thesis panel type reference codes must have been setup.

Import Research Supervisors Minimum Setup

Student program attempt must have been imported for the student (may be imported in the same run).

Research candidature detail must have been imported for the student (may be imported in the same run).

Supervisors must have been imported as persons into the system. For supervisors with funding, these must have been defined as staff members.

Research supervisor type lookup codes must have been setup.

Organizational units must have been established representing the ownership of supervisors.

Supervisors being replaced must be loaded during the same import or in a prior import.

Import Student Program HESA Statistics Minimum Setup

Student program attempt must have been imported (may be imported in the same run).

Qualification aims and FE qualification aims must have been created against the appropriate program versions.

Subject qualification aims must have been created as fields of study.

Dependent reference lookup information must have been set up, including:

- unit levels
- HESA return types
- all applicable HESA reference codes

The OSS Country Code profile option must be set to GB.

Import Student Unit Set (Year of Program) HESA Details Minimum Setup

Student unit set attempt must have been imported (may be imported in the same run).

Grading schema must have been established against the program offering option unit set UK statistics.

Teaching institutions must have been established as Institutions in OSS with types of Post-Secondary.

Dependent reference lookup information must have been set up, including:

- all applicable HESA reference codes
- unit levels

The OSS Country Code profile option must be set to GB.

25.4 Minimum Requirements for Records

Calendar setup steps must have been performed.

Program Structure and Planning setup steps must have been performed.

Person setup steps must have been performed.

Student Enrollment data must have been loaded.

You must run the person import process and PSP unit import and student enrollment import processes. Alternatively, you can manually enter the data.

All parent data for the student's unit, program, or grading must have been loaded or manually entered.

Import of Graduated Data Minimum Setup

The student program attempts being graduated must have already been imported into Student System through the Enrollment import processes.

The award must be available within the student's attempted program version.

The graduation ceremony round must exist.

The graduation calendar related to the graduation ceremony round must exist and be active. It must also have an associated unique alternate code specified. **Note:** There is an additional requirement for date aliases for start date and end date.

Proxy people must have been created as persons.

Surrendering program versions must exist.

Dependent reference lookup information must have been set up, including:

- award codes
- graduation approval status
- graduation status
- honors levels

Flexfield definitions must have been established prior to import.

Import of Level Advanced Standing Data Minimum Setup

The student program attempt details must have already been entered or imported into Oracle Student System.

Authorizing persons must have already been imported as staff members.

Exemption institutions must have been created or imported through the Institution import.

Load (Academic Term) calendars must have been created with unique alternate codes matching those being imported.

Linked academic history (transcript) units must have already been entered or imported.

Linked admission test results must have already been entered or imported.

Linked UK qualifications must have already been entered.

Dependent reference lookup information must have been set up, including:

- unit levels

- program types

Import of Unit Advanced Standing Data Minimum Setup

The student program attempt details must have already been entered or imported into Oracle Student System.

Authorizing persons must have already been imported as staff members.

Unit versions being granted and specified as alternate units must have been imported.

Grading schemas and grading schema grades, must have been created into the system. Grades should be defined according to the attributes of the grades being imported.

Exemption institutions must have been created or imported via the Institution import.

Load (Academic Term) calendars must have been created with unique alternate codes matching those being imported.

Linked academic history (transcript) units must have already been entered or imported.

Linked admission test results must have already been entered or imported.

Dependent reference lookup information must have been set up, including:

- program types

Import of Unit Outcomes Data Minimum Setup

Student unit attempt must have already been imported (may be imported with the same run).

Calendar must exist with matching unique alternate codes.

If grades are being imported without grading schema specified, the default grading schema must have been set up against the unit attempt unit versions/sections.

Grading schemas translations and the appropriate grade mappings must have been set up to trigger the derivation of the translated grade.

The unit attempt and or student program attempt grading schemas must have been entered or imported.

Flexfields definitions must have been established prior to import.

Import of Progression Data Minimum Setup

Student program attempt must have been imported for the students.

Progression calendars must have been set up corresponding to the import outcomes and must be active with unique alternate codes set up.

Progression outcome types must have been set up, and must have been linked to appropriate hold types corresponding to the desired effects. For example, suspensions must have been linked to holds with suspension effects.

Organizational units must have been established for the imported decision organizational units.

Dependent reference lookup information must have been set up, including:

- hold (excluded) program groups
- attendance types
- awards for positive outcomes
- programs for exclusions or suspensions
- units for exclusions or requirements
- unit sets for exclusions

Import of Class Rank Data Minimum Setup

Student program attempt must have been imported for the students.

Class rank cohorts and class rank cohort instances have been established for the ranks being imported. These are required for all load (academic term) calendars in which ranks are being imported.

The display rank is calculated by $\text{rank} / \text{total_population}$ - the total population for a cohort must be imported in order for the rank to calculate correctly.

Degree Audit

26.1 Degree Audit

Degree Audit functionality will be delivered in a later release of Oracle Student System.

Implementation Verification

27.1 Calendar Quality Check Exception Report

27.1.1 Calendar Quality Checks

27.1.1.1 Load Calendar Checks

The following table shows Load Calendar checks.

Table 27–1 Load Calendar Checks

Report Output Message	Explanation	Action
Load calendars should normally have only academic, award, admission, fee, progression, and user defined calendars as superiors	Load calendars can now have academic, award, admission, fee, progression, and user defined calendars as superior calendars.	Delete the invalid superior calendar and any other parent calendars not required in the Calendar Instance Relationships window

Table 27–1 Load Calendar Checks

Report Output Message	Explanation	Action
Load calendar instance must have one and only one load effective date alias instance	<p>This date alias is used to determine which is the current load calendar for purposes of point-in-time load and attendance type calculations. It looks for the most recently occurring instance of this date alias and uses the load calendar in which it exists.</p> <p>This message is usually displayed where:</p> <ul style="list-style-type: none"> No instance of the date alias is found in a load calendar <p>or</p> <ul style="list-style-type: none"> More than one instance of the date alias is found in a load calendar 	<p>Check for instance/s of the Load Effective date alias in the Maintain Date Alias Instances window and either:</p> <ul style="list-style-type: none"> Create an instance if none exist <p>or</p> <ul style="list-style-type: none"> Delete any extra instances leaving one remaining. <p>Note: The date alias to use as the Load Effective date alias must first be defined in the Enrollment Calendar Configuration window.</p>
Linked to a teaching calendar type that has no instance associated with the academic period	<p>This message is displayed where the teaching calendar is not linked to the same academic period as the load calendar. Consequently, load calculations will fail because the appropriate teaching calendar instance for the load calendar cannot be determined.</p>	<p>Check that the correct teaching calendar type is mapped to the load calendar instance in the Load Calendar Structure window.</p> <p>If this is correct, check that both the load and teaching calendar instances have the correct parent academic calendars.</p>
Teaching calendar type has only one instance associated with the academic calendar; a second percentage is not required	<p>A second percentage load apportion is only required if instances of the teaching calendar type span two academic calendars and therefore another instance of the context load calendar. A second percentage is only recorded if it differs from the first percentage.</p>	<p>Delete the second percentage from the load calendar instance teaching calendar type in the Load Calendar Structure window.</p>

Table 27–1 Load Calendar Checks

Report Output Message	Explanation	Action
Attendance type has no attendance type load detail and therefore cannot be derived within the load calendar	This message is displayed where at least one program attendance type has not been defined for at least one load calendar type. For example: the enrollment load range for attendance type PT is defined for load calendars Fall and Spring, but not calendar summer.	Check that all attendance type load ranges have been defined in the Program Attendance Types window.
There is no gap in the attendance type load ranges for the load calendar	When defining attendance type load ranges for a specified load calendar type, some load values may not have had an attendance type defined.	Check all attendance type definitions within the load calendar type for gaps in the Program Attendance Types window. Modify as appropriate.

27.1.1.2 Enrollments Calendar Checks

The following table shows Enrollments calendar checks.

Table 27–2 Enrollments Calendar Checks

Report Output Message	Explanation	Action
Enrollment calendars should not normally have any subordinate calendars	Invalid subordinate calendars, with the exception of user defined calendars, are not allowed.	Delete the invalid subordinate calendar in the Calendar Instance Relationships window.

27.1.1.3 Admission Calendar Checks

The following table shows Admission calendar checks.

Table 27–3 Admission Calendar Checks

Report Output Message	Explanation	Action
Admission calendars should have only one superior calendar of a particular Academic calendar type	Admission processes are always in the context of a particular academic period.	Admission processes are always in the context of a particular academic period.
Admission calendars should have at least one superior Teaching calendar	Parent teaching calendar/s are required if units are to be specified in applications. For example: non-award single unit.	Ensure appropriate parent teaching calendar/s exist in the Calendar Instance Relationships window. Note: Only those teaching periods relevant to the context admission period can be mapped.
Admission calendars should be defined for at least one Admission category	Admission calendars cannot be utilized, and therefore admission applications cannot be processed, unless the admission calendar is mapped to one or more admission categories.	Ensure that each admission calendar is mapped to appropriate admission categories in the Admission Period Calendars window.
Admission calendar does not have an initialization date	If the admission process definition for the admission category includes the steps RECONSIDER and/or DEFER, then the system date alias 'Initialize Adm Period Date Alias' must be defined in associated admission calendars. This is the date on which background processing for an admission period is run. For example: Admission Application Processing Status and the Create Deferment Applications concurrent process.	Check for an instance of the 'Initialize Adm Period Date Alias' in the Date Alias Instances window and create an instance if none exist. Note: The date alias to use as the Initialize Adm Period Date Alias must first be defined in the Admission Calendar Configuration window.
Admission calendar does not have an encumbrance checking date	If the admission process definition for the admission category includes the encumbrance checking step, then the system date alias Encumbrance Check Date Alias must be defined in associated admission calendars.	Check for an instance of the Encumbrance Check Date Alias in the Date Alias Instances window and create an instance if none exist. Note: The date alias to use as the Encumbrance Check Date Alias must first be defined in the Admissions Calendar Configuration window.

Table 27–3 Admission Calendar Checks

Report Output Message	Explanation	Action
Admission calendar does not have a program start date	This date alias is used to derive the program attempt commencement in the Student Enrollments window. If the Program Start Date Alias does not exist in the admission period, the system uses the program commencement date recorded for the context admission period, or the system date if the date of enrolment is later than the academic period course commencement date.	Check for an instance of the Program Start Date Alias in the Date Alias Instances window and create an instance if none exist. Note: The date alias to use as the Program Start Date Alias must first be defined in the Admissions Calendar Configuration window.
Admission calendar has more than one application due date that is not mapped to an override	<p>The application due date is a user defined date alias mapped to Due Date Alias in the Admissions Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.</p> <p>The first occurring due date is the default application due date for all admission applications associated with the admission period/admission category. The default date may be overridden in the Admission Period Date Overrides window. Due date overrides are other instances of the same date alias in the same admission calendar.</p> <p>This message is displayed where there is at least one instance of the due date alias in the admission period (other than the default date alias) that is not being used as an override.</p>	<p>Check for application due date alias instances in the admission calendar that are not being used as an override.</p> <p>Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases.</p> <p>Note: Some instances may have been created in advance as possible overrides, these may not need to be deleted.</p>
Admission calendar has more than one application final date that is not mapped to an override	The application final date is a user defined date alias mapped to 'Final Date Alias' in the Admissions Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.	Check application final date alias instances in the admission calendar that are not being used as an override. Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases.

Table 27–3 Admission Calendar Checks

Report Output Message	Explanation	Action
	The first occurring final date is the default application final date for all admission applications associated with the admission period/admission category. The default date may be overridden in Admission Period Date Overrides window. Final date overrides are other instances of the same date alias in the same admission calendar. This message is displayed where there is at least one instance of the final date alias in the admission period (other than the default date alias) that is not being used as an override.	Note: some instances may have been created in advance as possible overrides, these may not need to be deleted.
Admission calendar has more than one application offer response date that is not mapped to an override	The application offer response date is a user defined date alias mapped to Offer Response Date Alias in the Admission Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.	Check application offer response date alias instances in the admission calendar that are not being used as an override.

Table 27–3 Admission Calendar Checks

Report Output Message	Explanation	Action
	The first occurring offer response date is the default application offer response date for all admission applications associated with the admission period/admission category. The default date may be overridden in Admission Period Date Overrides window. Offer response date overrides are other instances of the same date alias in the same admission calendar. This message is displayed where there is at least one instance of the offer response date alias in the admission period (other than the default date alias) that is not being used as an override.	Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases. Note: some instances may have been created in advance as possible overrides, these may not need to be deleted.
Admission calendars should have one superior Academic calendar	See first admission calendar check item.	Delete invalid parent academic calendars in the Calendar Instance Relationships window.
Academic term (load) should have one superior Admission Calendar Instance	There is a mandatory one-to-one relationship between an admission and a load calendar	Delete invalid subordinate admission calendars in the Calendar Instance Relationships window. Create a subordinate Load calendar if one does not exist in the Calendar Instance Relationships window.

27.1.1.4 Teaching Calendar Checks

The following table shows Teaching calendar checks.

Table 27–4 Teaching Calendar Checks

Report Output Message	Explanation	Action
Teaching calendars should normally have only superiors of Academic, Progression, Examination or Assessment calendars (calendar category)	Valid superior calendars for teaching calendars are academic, assessment, exam, progression, holiday and user defined calendars.	Delete the invalid superior calendar in Calendar Instance Relationships

Table 27–4 Teaching Calendar Checks

Report Output Message	Explanation	Action
Teaching calendars must have at least one Census Date alias instance within the bounds of the academic calendar start/end dates	N/A	<p>Check for instance/s of Census Date alias in the Date Alias Instances window and create an instance if none exist.</p> <p>Note: The date alias to use as the Load Effective date alias must first be defined in the Enrolment Calendar Configuration window.</p>
Total load apportionment for the teaching calendar instance does not total 100%	<p>This message is used to identify cases where a particular teaching calendar instance has a total distribution of load (to one or more load calendars) that does not equal 100%. For example: load for teaching period S1-E1 (1998-1999) is distributed as follows - 33.33% to load calendar 1 (1998), load calendar 2 (1998), load calendar 1 (1999). Total apportionment is 99.99%.</p> <p>This message can appear where straddling teaching periods are rolled over and a load calendar does not exist for the last apportionment. For example: the academic year 1998 is rolled over to 1999. A new instance of the S1-E1 teaching period is created (1999 - 2000). The calendar quality check would detect that only two thirds of the apportionment is available (load calendar 1 (1999) and load calendar 2 (1999)). This problem can be resolved by creating an instance of load calendar 1 (2000).</p>	<p>Check apportionment details for specified teaching calendar instances in the Load Calendar Structure window. Correct as necessary.</p> <p>Note: as load apportionment is defined at the teaching calendar type level, rather than the instance level, it is necessary to identify which teaching calendar instances relate to which load calendar instances.</p>

Table 27–4 Teaching Calendar Checks

Report Output Message	Explanation	Action
All administrative unit statuses used within teaching calendar instances must be linked to the apportionment load calendar instances via the administrative unit status load structure (administrative unit status)	<p>This message occurs where an administrative unit status is mapped to a discontinuation date alias the Enrollment Calendar Configuration window. The discontinuation date alias is in turn, mapped to one or more instances within teaching calendar instances that are defined in the load calendar structure. However, the administrative unit status has not been recorded for the load calendar/teaching calendar load apportionment.</p> <p>For example: the administrative unit status WD-LATE is mapped to the discontinuation date alias WDN-LATE. This date alias has an instance in the teaching calendar SEM-1 (1998). Teaching calendar type SEM-1 is linked to load calendar 1 (1998) in the Load Calendar Structure window. However, the administrative unit status WD-LATE has not been recorded in the Administrative Unit Status Load block of the Load Calendar Structure window for the load calendar/teaching calendar load apportionment.</p>	<p>First check that the administrative unit statuses are defined within the discontinuation date criteria in the Maintain Unit Discontinuation Date Criteria window.</p> <p>Check in the Load Calendar Structure window that all used administrative unit statuses are defined in the context of each load calendar/teaching calendar load apportionment.</p> <p>If not, create appropriate administrative unit status load records.</p>
Teaching calendars should have at least one Admission subordinate calendar	N/A	Add a valid subordinate Admission calendar in the Calendar Instance Relationships window.

27.1.1.5 Configuration Dates Checks

The following table shows Configuration Dates checks.

Table 27–5 Configuration Dates Checks

Report Output Message	Explanation	Action
Load Effective Date alias instances should exist only within Load calendar instances	This date alias is used to determine which is the current load calendar for purposes of point-in-time load and attendance type calculations. It looks for the most recently occurring instance of this date alias and uses the load calendar in which it exists. Instances in calendars other than load have no effect.	Delete instances of the load effective date alias that do not exist in load calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Commencement Date alias instances should exist only within Academic calendar instances	This is the date alias representing the commencement date within an academic period calendar instance. Only one commencement date alias can exist in each academic period calendar instance. Instances of this date alias in calendars other than academic have no effect.	Delete instances of the commencement date alias that do not exist in academic calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Commencement Cutoff alias instances should exist only within Teaching calendar instances	This is the date alias within a teaching period on which a student is no longer considered as commencing their course. The system looks for an instance of this date alias in the student's first enrolled teaching period to determine if they are a commencer (new) or a non-commencer (returning). The census date is normally used as this date alias. Instances of this date alias in calendars other than teaching have no effect.	Delete instances of the commencement date alias that do not exist in teaching calendars in the Date Alias Instances window. Note: The user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.

Table 27–5 Configuration Dates Checks

Report Output Message	Explanation	Action
Enrolment Form Due Date alias instances should exist only within Academic or Enrolment calendar instances	This date alias is used as a default enrolment form due date. The default is only used if an override form due date is not specified when the pre-enrolment routine is run. Instances of this date alias in calendars other than academic and enrolment have no effect. (This will be updated in the near future to only apply to Enrolment calendar instances).	Delete instances of the commencement date alias that do not exist in academic or enrolment calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Enrolment Package Production Date alias instances should only exist within Academic or Enrolment calendar instances	This date alias is used as a default enrolment package production date. The default is only used if an override package production date is not specified when the pre-enrolment routine is run. Instances of this date alias in calendars other than academic and enrolment have no effect. (This will be updated in the near future to only apply to Enrolment calendar instances).	Delete instances of the commencement date alias that do not exist in academic or enrolment calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.

27.1.1.6 Award Calendar Checks

The following table shows Award calendar checks.

Table 27–6 *Award Calendar Checks*

Report Output Message	Explanation	Action
Award calendar instance should have at least one subordinate Academic Term (Load) calendar instance	There is a mandatory relationship between Award and at least one Academic Term (Load) calendar if using the Financial Aid module.	Create a relationship between an Award and Academic Term (Load) calendar in the Calendar Instance Relationships window

27.2 UCAS Records Importing Verification

To verify that UCAS applicant and application records can be successfully imported, check that the following setup has been completed:

- 1. Person source types UCAS_APPL and UCAS_PER
- 2. Admission source categories for the source types UCAS_APPL and UCAS_PER
- 3. Match criteria sets for the source types UCAS_APPL and UCAS_PER
- 4. Alternate person ID types for UCAS ID and UCASREGNO

In addition, the following alternate person ID types must be set up:

- NMASID if using the NMAS and Admissions system
- SNASID if using the NMAS and Admissions system

Oracle Student System Profile Options

A.1 Prerequisites

The values available for certain profile options may be defined during setup of Oracle Student System setup windows. As a result, the profile option is dependent on completed setup for that window. This information is referenced in this guide during setup of the subsystem to which the profile option relates.

A.2 Oracle Student System Profile Options

All Oracle Student System profile options are set up during the completion of subsystem setup activities discussed previously in this guide. The following table is a complete list of all IGS and IGF profile options and is included for reference purposes only.

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
FND: APPTREE create public folders	Save personal or public shortcut nodes in the Organizational Structure Setup window	<p>Default value is No.</p> <p>When set to No, personal and public shortcuts are not saved as nodes in the Organizational Structure Setup window.</p> <p>When set to Yes, personal and public shortcuts are saved as nodes in the Organizational Structure Setup window.</p>	N/A	X			X	Required
IGS: Address Type for Residence	Set address for Student Finance functionality Note: This is not a default address for all address usage.	<p>Default value is Bill To.</p> <p>Select an address usage. Address usages are extensible, which means that you can add values.</p>	N/A	X				Required
IGS: Advising Hold Type	Set advising hold type	<p>Set to define the hold that is used to create an enrollment clearance; for example, an Advising Hold.</p> <p>Values are user-defined.</p> <p>Note: You must set up a hold type named Administrative. This Administrative hold type must be mapped to new hold effect type named Block All Enrollment Activity.</p> <p>Note: This profile option is dependent on setup in the Person Hold Types window.</p>	N/A	X				Required to set up advising holds; optional if you do not want to use advising holds functionality

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: AMS Category Type	Set to create deliverables	Default value is Body. Values include Body, Call to Action, Closing, Disclaimer, Greetings, Offering, Opt Out Link, and Referral.		X	X			Required
IGS: AMS Category Sub Type	Set to create deliverables Note: Must be set after IGS: AMS Category Type profile option. You must close the Profile Options window completely after setting the IGS: AMS Category Type profile option.	Default values is Email. Values include Creative, Deliverable, Direct Mkg, Email, Event, Press/Analyst, Promotional Item, Publishing, Sales Tools, and Web.		X	X			Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Approval Required for Person Creation	Set whether approval is required for person creation	<p>Default value is No. Values include Yes and No.</p> <p>When set to Yes, Workflow notification will be used for the approval process in allowing a person to be created into the production tables.</p> <p>When set to No, Workflow notification will not be used for the approval process in allowing a person to be created into the production tables.</p>	IGS_PE_APPROVAL_REQUIRED	X				Optional
IGS: Approver of Person Creation	Set approvers for person creation	<p>Select FND user name.</p> <p>This profile option is used for routing workflow to create a person.</p> <p>Note: An FND USER must be created.</p>	IGS_PE_USER_APPROVER	X				Required if IGS: Approval Required for Person Creation profile option is set to Yes.
IGS: Attendance Type and Attendance Mode	Set attendance type and attendance mode	<p>Default value is Derived Values.</p> <p>When Derived Values is selected, the values are populated into the Oracle Student System and Oracle Financial Aid windows.</p> <p>When Nominated Values is selected, users must enter values in Oracle Student System and Oracle Financial Aid.</p>	N/A	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Call Number For Unit Section	Set a unique descriptor to use as quick reference for a unit section within a specific teaching period	<p>Default value is User Defined.</p> <p>Values include Auto Generated, None, User Defined.</p> <p>When User Defined is selected, users must set up the call numbers for unit section.</p> <p>When Auto Generated is selected, call numbers for unit sections are generated automatically.</p> <p>When None is selected, the call number is not generated by the system.</p> <p>This profile determines whether the call number is system generated or manually generated.</p>	N/A	LOV: system-generated user-generated				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Career Model Enabled	Set to enable career model	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to yes, Career functionality is enabled and you can enroll students in careers; for example, undergraduate and graduate, and establish relationships between programs and units.</p> <p>When the IGS: Career Model Enabled profile option is not selected during installation, Career functionality is not enabled, and you can enroll students in programs, not careers.</p> <p>Note: Institutions in the United States are more likely to set the IGS: Career Model Enabled profile option to Yes.</p> <p>For more information, see Career Configuration in Chapter 8, "Program Structure and Planning".</p>	N/A	X LOV: Yes No				Required
IGS: Citizenship Residence Status	Set default citizenship or residency status as defined in person statistics code citizenship status	<p>Enter a user-defined value.</p> <p>Values are defined in the Citizenship Status Lookup.</p> <p>This information defaults into the Person Statistics window in the Demographic tab.</p> <p>Note: This profile option is dependent on the values for lookup type PE_CITI_STATUS.</p>	IGS_PE_CTZN_CODE	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Class Rank Cohort Management	Allows different levels of security to enable users to create and edit cohorts and change statues.	<p>Values include Yes and No.</p> <p>When set to Yes, creation of cohorts and editing of cohort rules is allowed.</p> <p>When set to No, creation of cohorts and editing of cohort rules is not allowed.</p> <p>When set at the site/application levels, the setting affects all users.</p> <p>When set at the responsibility level, the setting affects all users with the given responsibility.</p> <p>When set at the user level, the setting affects only the user.</p>	IGS_PR_ALLOW_COHORT_MGMT	X	X	X	X	Optional
IGS: Class Rank Override	Allows different levels of security to enable users to override an individual rank	<p>Values include Yes and No.</p> <p>When set to Yes, override of a student's rank is allowed.</p> <p>When set to No, override of a student's rank is not allowed.</p> <p>When set at the site/application levels, the setting affects all users.</p> <p>When set at the responsibility level, the setting affects all users with the given responsibility.</p> <p>When set at the user level, the setting affects only the user.</p>	IGS_PR_ALLOW_RAN_OVERRIDE	X	X	X	X	Optional

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic ation Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Country Code	Set country code for UK localization Note: Required for US institutions .	Values include all countries in the world. Note: When set to GB United Kingdom, United Kingdom specific functionality is enabled.	N/A	X	X			Required
IGS: Country of Citizenship	Set country of citizenship	Enter country of citizenship. Values include all countries in the world. This information defaults into the Citizenship tab on the International Details window.	IGS_PE_COUNTR Y_CTZN	X				Required
IGS: CRM User ID	Set CRM User ID for Correspondence	Enter names of users for CRM Correspondence functionality. To provide the values for this option, you need to enter values for IGS: Fulfillment Server ID profile option. After you enter these values, all the users related to that server will be available to select from. These values are set in CRM during setup. Note: This profile option is dependent on CRM setup.	IGS_CO_CRM_ USER_ID	X				Required if using Correspondence functionality

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Decides whether the Income Tax Tab has to be Displayed	Display Income Tax tab on Person Statistics window	Default value is Yes. Values include Yes and No. When set to Yes, the Income Tax tab on the Person Statistics window is visible. When set to No, the Income Tax tab on the Person Statistics window is not visible.	IGS_PE_DISPLAY_INCOME_TAX	X				Optional
IGS: Decides whether the Religion Tab has to be Displayed	Display Religion Tab	Default values is Yes. Values include Yes and No. When set to Yes, the Religion field in the Biographic tab on the Person Statistics window is visible. When set to No, the Religion field in the Biographic tab on the Person Statistics window is not visible.	IGS_PE_DISPLAY_RELIGION	X				Optional
IGS: Decides whether the Voter Tab has to be Displayed	Display Voter tab on Person Statistics Window	Default values is Yes. Values include Yes and No. When set to Yes, the Voter tab on the Person Statistics window is visible. When set to No, the Voter tab on the Person Statistics window is not visible.	IGS_PE_DISPLAY_VOTER_TAB	X				Optional

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Degree Audit/Transfer Evaluation Options	Set to identify external software enabled at institution	<p>Default value is Combined Degree Audit Transfer Eval Software Enabled.</p> <p>Values include Degree Audit Only, Combined Audit and Transfer Evaluation, Transfer Evaluation Only, No Degree Audit or Transfer Eval Software Enabled.</p> <p>Enter the value that reflects the third-party degree audit software enabled at institution.</p> <p>No DA/TE software: No third-party software is enabled.</p> <p>Degree Audit Only: The third-party software can only process degree audit requests.</p> <p>Transfer Evaluation Only: The third-party software can only process transfer evaluation requests.</p> <p>Combined: The third-party software can process degree audit and transfer evaluation requests.</p>	IGS_DA_TRANSFER_EVAL	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Degree Audit Debug Option	Set to enable Oracle Student System request debug log	<p>Default Value is No and defined at the user level profile.</p> <p>If this profile is set to 'YES' then an execution log should get generated which can be viewed from the concurrent manager Requests screen by clicking on the view log button. This log would include both the debug messages and the valid code messages like the error/Warning messages.</p> <p>If Set to 'NO' then the execution log should not be generated. Only valid code error message (if any) would be visible when the user clicks on the view log button in the request screen of the concurrent manager</p>	IGS_DA_GEN_LOG	X				Optional

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Degree Audit Institution Alternate Identifier Types	Set to identify ID type mapped to institution alternate codes used for transfer evaluation software	<p>Default value is Identifier for DA software.</p> <p>Values include Identifier for DA software, Identifier for HESA, Identifier for Association of Collegiate Athletics, Identifier for Professional School Accreditation, and National Student Clearinghouse Branch.</p> <p>Select which institution alternate ID type will be passed to the outgoing data exchange area in the request screen fields called Institution Code and Reference Articulation Institution Code.</p> <p>This setup is required for institutions that use a third party software that requires this information.</p>	IGS_DA_INST_ALT_ID_TYPE	X				Optional

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Degree Audit Major Unit Set Category	Set to identify unit set category mapped to majors	<p>Default value is NULL.</p> <p>Values include Major Requirements, Minor Requirements, Core Requirements, Administrative Requirements, Elective Requirements, Concentration Requirements, Certification Requirements, and Tracking Requirements.</p> <p>If a third party degree audit software is being used and the institution has identified Program Code plus Unit Set Code as being used to define academic program, the institution is required to identify which unit set category represents Major. Select from the Unit Set Types.</p> <p>Dependent on value selected for system profile IGS: Degree Audit Program Major Definition. If value is set to Yes, then this system profile is inappropriate and should not be set. If value is set to No (default value), then this system profile is required to be set.</p>	IGS_DA_MAJ_UNT_SET_CATGRY	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Degree Audit Minor Unit Set Category	Set to identify unit set category mapped to minors	<p>Default value is NULL.</p> <p>Values include Major Requirements, Minor Requirements, Core Requirements, Administrative Requirements, Elective Requirements, Concentration Requirements, Certification Requirements, and Tracking Requirements.</p> <p>If institutions identify the unit set category associated with Minor and/or Track/Option, these functions must be defined if this information is to be displayed on the request screen.</p> <p>Select from the Unit Set Types.</p>	IGS_DA_MNR_UNT	X				Optional
IGS: Degree Audit Organization Types	Set to identify organization type representing academic organizations listed for what-if degree audit requests	<p>Default value is Academic.</p> <p>Values include Academic, Administrative, Agent, External, Internal, and Support.</p> <p>This profile option is used to limit the institution lookups for what-if requests. Enter the value that best represents the organization type.</p>	IGS_DA_ORG_TYPE_ID	X				Optional
IGS: Degree Audit Preferred Address	Set to identify standard address associated with requests	<p>Default value is Home.</p> <p>Select an address usage. Address usages are extensible, which means that you can add values.</p>	IGS_DA_PREF_ADDR_USE	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plication Level	Res pon sibi lity Level	Us er Level	Require d or Optional
IGS: Degree Audit Program Major Definitions	Set to identify relationship between program and major during Oracle Student System implementation	<p>Default value is No. Values include Yes and No.</p> <p>When set to Yes, the degree audit interface will combine the program/unit set to pass to the third-party software as the program code.</p> <p>When set to No, the degree audit interface will pass the program and unit set separately to the third-party software.</p>	IGS_DA_PROG_MAJ_DEF	X				Required
IGS: Degree Audit Student Alternate ID Type	Set to identify alternate student ID type setup in the external degree audit or transfer evaluation software	<p>Default value is NULL.</p> <p>Values include Staff ID, Social Security, Driver's License, Student ID Number, Obsoleter, Merge Person Details, and Obsoleted ID.</p> <p>This value defines how the student is identified when passed to the third-party software.</p> <p>Enter the value by which student is to be identified in the external degree audit or transfer evaluation software.</p>	IGS_DA_STUDENT_TYPE	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Degree Audit Student List	Set to enable individuals the ability to view lists of students during a batch request process	Default value is No. When set to Yes, this responsibility is set at the user level to allow the specific user to view a list of students when making a multiple selection. Set to Yes for each self-service login user desired.	IGS_DA_STDNT_LIST_VIEW				X	Required
IGS: Degree Audit Track Unit Set Category	Set to identify unit set category mapped to major's track / option	Default value is NULL. Values include Major Requirements, Minor Requirements, Core Requirements, Administrative Requirements, Elective Requirements, Concentration Requirements, Certification Requirements, and Tracking Requirements. If institutions identify the unit set category associated with Minor and/or Track/Option, these functions must defined if this information is to be displayed on the request screen. Select from the Unit Set Types.	IGS_DA_TRCK_UNT_SET_CATGRY	X				Optional

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plication Level	Res pon sibility Level	Us er Level	Require d or Optional
IGS: Degree Audit What If Unit Set Titles	Set to identify title listed for degree audit what if requests	Default value is Short Title. Values include Abbreviation, Short Title, and Entire Title. When set to Abbreviation, only the abbreviated title for the what-if unit set is displayed on the self-service request page. When set to Short Title, only the short title for the what-if unit set is displayed. When set to Entire Title, the entire title for the what-if unit set is displayed.	IGS_DA_WIF_UNT_SET_TITLE	X				Required
IGS: Degree Audit Workflow Administrator	Set to identify degree audit module's workflow administrator	Possible values are defined users. Enter the individual responsible for degree audit workflow.	IGS_DA_WF_ADMIN	X				Required
IGS: Delivery Destination Name	Destination name used by delivery method type Set for correspondence print functionality	Select the printer name that is set in the RightFax server.	IGS_CO_DESTINATION_NAME	X		X	X	Required if using Correspondence print functionality

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Display Dropped Unit Sections in the Schedule - Administrator	Display dropped unit section in the schedule for administrative users in self-service	Default value is No. Values include Yes and No. When set to No, dropped unit sections are not displayed in the schedule. When set to Yes, dropped unit sections are displayed in the schedule.	N/A	X				Required
IGS: Display Dropped Unit Sections in the Schedule - Student	Display dropped unit section in the schedule for student self-service users	Default value is Yes. Values include Yes and No. When set to Yes, dropped unit sections are displayed in self-service for the student user. When set to No, dropped unit sections are not displayed in self-service for the student user.	N/A	X				Required
IGS: Duplicate Match Criteria	Set match criteria to check for duplicate person records during manual data entry. Not used during data import.	Enter a user-defined value. This profile option uses the match set criteria attributes to determine how to check for duplicates during manual data entry. Note: This profile option is dependent on setup in the Source Types window.	IGS_PE_DUP_MATCH_CRITERIA	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Family Address Usage	Set address usage for Family Addresses window	Default value is Home. Select an address usage. Address usages are extensible, which means that you can add values.	IGS_AD_ADR_USG	X				Required
IGS: Family Age Auto Population	Set family age auto population to set age in the Family Details window	Default value is 20. Values include numbers ranging from 5 to 40. If the person's age is less than the value set for this profile option, then all family members get this person's address with the usage as specified by the family address usage profile option.	IGS_AD_AUTONUM	X				Required
IGS: Final Unit Set Derivation	Specifies the logic for deriving final unit set for a self-service admission application when submitted by a student	Values include Not be derived, Derived as the unit with the lowest preference number, and Derived as the unit set with the highest preference number.	IGS_AD_DERIVE_FINAL_US	X	X	X		Required
IGS: Fulfillment Server ID	Set Fulfillment Server for CRM / Correspondence functionality	Values are based on CRM Fulfillment server setup. After you have set the servers in CRM setup, all of those server IDs are available.	IGS_CO_FUL_SERVER_ID	X				Required if using Correspondence print functionality

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Generate Curriculum ID	Set generate curriculum IDs to automatically assign curriculum IDs	Default value is No. Values include Yes and No. When set to No, curriculum IDs are manually generated. When set to Yes, curriculum IDs are automatically generated.	N/A	X				Required
IGS: Generate User Name Automatically	Set to generate user name automatically	Default value is No. Values include Yes and No. When set to No, user names are not automatically generated. When set to Yes, user names are automatically generated.	IGS_PE_GENERATE_USER	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Include Audit Credit Point in Total	Set to indicate if audit credit points are included in total	<p>Values include Yes and No.</p> <p>Recommended that profile option be set to NO so that the enrolled credit point totals do not include credit points for audit attempts.</p> <p>When set to Yes, the enrolled credit points for all audit unit attempts are counted toward the total maximum and minimum credit point limits for the term.</p> <p>When the profile option is set to No, the enrolled credit points for the audit unit attempts are not counted as part of the maximum and minimum credit point limits.</p> <p>This means that when the profile option is set to Yes, the audit unit attempts are included in the attendance type calculation, and when the profile option is set to No, the enrolled credit points for audit unit attempts are not included in the attendance type calculation.</p>	N/A	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic ation Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Include Waitlist	Set to include waitlisted credit points in total	Default value is Yes. Values include Yes and No. When set to Yes, waitlisted credit points are included in total credit points and fees are assessed. When set to No, waitlisted credit points are not included in total credit points and fees are not assessed.	N/A	X				Required
IGS: Indicates whether Scheduling Software is installed	Set to indicate whether scheduling software is installed	Default value is Yes. Values include Yes and No. When set to Yes, scheduling software installed at institution. When set to No, scheduling software is not installed at institution.	N/A	X	X			Optional
IGS: Institution Grading Scale	Set to automatically convert applicant grade point averages entered in Academic History window to preferred institutional grading scale	Enter the grading scale used by institution. Values include 4 Point, A-F, and 100 Point. When set to 4 Point, the grading scale is A = 4 points, B = 3 points, C = 2 points, D = 1 point, and F = 0 points. When set to A-F, grading scale is A, B, C, D, F. When set to 100 points, grades are given values from 100 to 0. Note: This profile option is dependent on setup for grading scale types in the Grading Scale Types window.	IGS_AD_INST_GRADING_SCALE	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: JTF Outcome	Set to determine the outcome of an interaction between prospective student and recruiter; for example, collateral material	Values are seeded values stored in CRM		X	X			Required
IGS: JTF Reason	Set to determine the reason for initiation of interaction between prospective student and recruiter; for example, Inquiry	Values are seeded values stored in CRM		X	X			Required
IGS: JTF Resource	Set to determine the recruiters	Values are salespersons set and stored in CRM		X	X			Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: JTF Result	Set to determine the result of interaction; for example, Applying to Institution	Values are seeded values stored in CRM		X	X			Required
IGS: Language Code	Set language code	Default is American English. Values include all languages. Note: If US institution, set to American English. This information defaults into the Languages tab on the Person Statistics window.	IGS_PE_LANGUAGE_CODE	X				Required
IGS: Mask Credit Card Number	Set to mask credit card number in self-service	Default value is No making. Values include Mask - First four digits visible, Mask - Last four digits visible, and No masking. Enter the value that describes the preferred masking option. Most institutions will likely mask all but the last four digits visible.	N/A	X				Optional
IGS: Merchant Reference	Set payee ID	Default value is SF Merchant. There are no other values. Note: This profile option is dependent on CRM iPayment setup.	N/A	X	X			Required if using CRM iPayment

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Number of Days Since Last Verification	Set the number of days since last user information verification in self-service	Enter the number of days between self-service users are prompted to verify their information.	IGS_PE_VERIFY_INT	X				Required ; if IGS: Student Verification Mode = At Least X Number of Days Since Last Verification
IGS: Participate in US Financial Aid Program	Set to indicate if the school participates in U.S. government Financial Aid programs.	<p>Values include Yes and No.</p> <p>When set to Yes, this will enable the Financial Aid Program Types attribute in Program Types IGSPS001. Financial Aid Program Types are used in Academic History to determine if the student has a prior bachelor's degree.</p> <p>When set to No, the Financial Aid Program Types attribute in Program Types IGSPS001 is disabled.</p>	IGS_PS_PARTICIPATE_FA_PROG	X				Required to participate in U.S. student financial aid programs
IGS: Path of file where export data will be stored	Set path of file where export data will be stored	Enter the export data file's path.	N/A	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Person Catalog	Set person catalog	<p>The Person Catalog field on the General tab on the Person Statistics window will initially be populated by either the initial admittance term, the matriculation term, or the most recent admittance term.</p> <p>This profile option initially sets the Matriculation Term field on the General tab of the Person Statistics window after enrolling in either non-generic programs or both generic and non-generic programs.</p> <p>Default value is Matriculation Term.</p> <p>Values include Initial Admittance Term, Matriculation Term, and Most Recent Admittance Term.</p>	IGS_PE_CATALOG	X				Required
IGS: Person Matriculation Term	Set person matriculation term	<p>Default value is Non-Generic Programs.</p> <p>Values include Non-Generic Programs and Both Non-Generic and Generic Programs.</p>	IGS_PE_MATR_TERM	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Person Most Recent Admittance Term	Set person most recent admittance term	Default value is Accepted Application Offer Only. Values include Accepted Application Offer Only and Accepted Application Offer and Enrolled Unit Attempts. This profile option initially sets the value on the Most Recent Admittance Term field on the General tab of the Person Statistics window. This will be populated during Admissions based on the option selected.	IGS_PE_RECENT_TERM	X				Required
IGS: Pre-enrollment Year	Set pre-enrollment year	Default value is Yes. Values include Yes and No. When set to Yes, year of program functionality is enabled. When set to No, year of program functionality is not enabled.	IGS_PS_PRENRL_YEAR_IND	X				Required
IGS: Remit To Address Usage	Set remit to address	Select an address usage. Address usages are extensible, which means that you can add values.	N/A	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Residency Class	Set residency class Note: User-defined residency detail codes must be set up prior to setting this profile option.	Enter a user-defined value. This value defaults into the Residency Class tab on the Person Residency Details window. Residency classes are defined as values for lookup type PE_RES_CLASS.	IGS_FI_RES_CLASS_ID	X	X	X	X	Required
IGS: Self Service Administrator	Set self-service administrator information	Values include FND user names. Note: This profile option is dependent on user definition.	IGS_PE_USER_ADMIN	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: SEVIS Debug Option	Set to produce report of all errors in the IGS: SEVIS Exchange Visitor Batch concurrent process and IGS: SEVIS Non-Immigrant Batch Process concurrent process to assist DBAs or system administrators with debugging.	Values include Yes and No. When set to Yes, the error report is generated and produced. When set to No, the error report is generated but not produced.	N/A					Optional
IGS:SEVIS Enabled	Set to indicate if SEVIS functionality is enabled at your institution	Values include Yes and No. When set to Yes, SEVIS functionality is enabled. When set to No, SEVIS functionality is not enabled.	N/A	X				Required for SEVIS reporting

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Special Permission Required to Update Credit Points and Grading	Indicate if special permission is required to update credit points and grading	Default value is No. Values include Yes and No. When set to No, special permission is not required to update credit points and grading. When set to Yes, special permission is required to update credit points and grading.	N/A					Required
IGS: Student and Exchange Visitor	N/A	Values include Yes and No.	N/A	X				Required
IGS: Student Finance Pay Refund Voucher Alone	Pay refund vouchers alone or separately in Oracle Payables	Values include Yes and No. If set to yes, the Transfer Refunds to Oracle Payables concurrent process pays the refund vouchers for a party in one payment. If set to No, the Transfer Refunds to Oracle Payables concurrent process pays the refund vouchers for a party in separate payments.		X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Student Information Verify Mode	Set to prompt student self-service users to verify information	Enter the time interval in which a person must verify their personal information in self-service. Default value is Every Sign On. Values include At least X number of days since last verification, Every Sign On, and First Sign On Each Academic Term.	IGS_PE_VERIFY_MODE	X				Required
IGS: Supplier Name	Derive supplier name for party type person for supplier creation in Oracle Payables	Values include Last Name, First Name and First Name Last Name. Set to indicate how you want to create the supplier name in Oracle Payables		X				Required
IGS: Supplier Number	Derive supplier number to create supplier in Oracle Payables	Values include Party Number and PERSON_ID_TYPE column values from the IGS_PE_PERSON_ID_TYP table Set to indicate how you want to create supplier numbers in Oracle Payables		X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic ation Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: UCAS Interface Type	Hercules Interface	Indicates UCAS Hercules subsystem used for communicating application information with UCAS. Values include Hercules Interface and Marvin Interface. When Hercules is selected, the Hercules interface is selected to control communication with UCAS. All communication events are controlled from within Oracle Student System. When Marvin is selected, the Marvin interface is selected to control communication with UCAS. All communication events require manual intervention to FTP (file transfer protocol) interface files between the institution and UCAS.	IGS_UC_INTERFA CE_TYPE	X	X			Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Ap plic atio n Lev el	Res pon sibi lity Lev el	Us er Lev el	Require d or Optional
IGS: Unit Section Enrollment Method Types	Set unit section enrollment method types	<p>Enter the method for which users can enroll in unit sections.</p> <p>Default value is Self Service Enrollment.</p> <p>Values include Self Service and Interactive Voice Response Enrollment, Interactive Voice Response Enrollment, and Self Service Enrollment.</p> <p>When set to Self Service and Interactive Voice Response, unit section enrollment is available in both self-service and interactive voice response.</p> <p>When set to Interactive Voice Response Enrollment, unit section enrollment is available in interactive voice response.</p> <p>When set to Self Service Enrollment, unit section enrollment is available in self-service.</p>	N/A	X				Required
IGS: Update Credit Points and Grading Schema	Set to update credit points and grading schema	<p>When set to Yes, users can change credit points and grading schemas for an enrolled unit section if the unit section is set up to support such changes.</p> <p>When set to No, users cannot update the credit points and grading schemas for an enrolled unit section.</p>	N/A	X				Required

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
IGS: Use Funds Authorization	Set to enable the institution / site to use funds authorization	Default value is Yes. Values include Yes and No. When set to Yes, the site can use funds authorization. When set to No, the site cannot use funds authorization.	FUND_AUTHORIZATION	X				Required
IGS: Validate Timeslots	Set to validate timeslots	Default value is Start Time Only. Values include Start Time Only and Start Time through End Time. When set to Start Time Only, users can enroll from the start of their assigned timeslot until the census date. When set to Start Time through End Time, users can enroll only from the start to the end of their timeslots.	N/A	X				Required
IGS: Waitlist Allowed with Time Conflict	Set to enable waitlists allowed with time conflicts	Default value is No. Values include Yes and No. When set to No, the waitlisted unit section cannot conflict with other unit sections. When set to Yes, students can waitlist for a unit section even if the waitlisted unit section has a time conflict with other unit sections.	N/A	X				Required
IGS: Workflow Enable	Set to enable Workflow	Default value is Yes. Values include Yes and No. When set to Yes, Workflow functionality is enabled. When set to No, Workflow functionality is not enabled.	IGS_WF_ENABLE	X	X			Required if using Workflow functionality

Table A–1 Oracle Student System Profile Options

Profile Option Name	Feature	Description	Internal Name	Site Level	Application Level	Responsibility Level	User Level	Required or Optional
HZ: Generate Party Number	Generate unique identifier for person IDs and organizational unit IDs	<p>Set value to Yes.</p> <p>This profile option is required for self service application.</p> <p>When set to Yes, a unique identifier is generated for person IDs and organization unit IDs.</p> <p>When set to No, a unique identifier is not generated for person numbers, organization unit codes, and institution codes.</p>					X	<p>Required for self service application and the Self-Service New User Registration Process.</p> <p>For the New User Self-Service Registration Process, the profile option must be set at the site level.</p>

Most Oracle Student System business events are enabled by default. The exceptions are:

- oracle.apps.igs.pe.rescal.ac
- oracle.apps.igs.pe.rescal.ai
- oracle.apps.igs.pe.rescal.io
- oracle.apps.igs.pe.rescal.os
- oracle.apps.igs.pe.rescal.ss

There is no Generate Function Name for any Student System business event.

For more information about business events, see Managing Business Events, *Oracle Workflow Guide*.

B.1 Program Structure and Planning

B.1.1 Workflows

B.1.2 There are no workflows in Program Structure and Planning.

B.1.3 Business Events

The following table describes business events in Program Structure and Planning.

Table B–1 Business Events for Program Structure and Planning

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.ps.wfus_md	IGSSWTST/ Main_ Process	Triggered when users change values of Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, Start_Time, End_Time, Building_Code, Room_Code, Instructor_Id in the Unit Section Occurrences window; notifies users when a unit section occurrence is changed;	Oracle Student System	igs
oracle.apps.igs.pf.wfus_cn	IGSSWTST/ Main_ Process	Triggered when users change the status of a unit section to Cancel in the Unit Section Details window; makes necessary changes in scheduling; notifies users when a unit section is cancelled;	Oracle Student System	igs

B.2 Person

B.2.1 Workflows

The following table describes workflows in Person.

Table B–2 Workflows for Person

Workflow	Item Type	Description	Owner Name	Owner Tag
IGSPE001.wft	Residency Change IGS_PE_RES_CHG	Triggered when a student changes his or her residency status	Oracle Student System	igs
IGSPE002.wft	Address Change IGS_PE_ADDR_CHG	Triggered when a student changes his or her address details	Oracle Student System	igs
igs_generate_user.wft	IGS generate new user IGSPEGEN	Triggered when a user attempts the new user registration in self service; self service administrative users can approve or reject the creation of a person Note: Profile option IGS: Approval for Person Creation must be set to Yes and profile option IGS: Approver of Person Creation must have a user id assigned.	Oracle Student System	igs

B.2.1.1 Residency Change Workflow

Note: In order for the notification to be sent to the designated user, the user name STUDENT_FIN must be an active account with a valid email address when a student or person changes his or her residency class or status. An alternative is to update the Responsible Person attribute for the Residency Change workflow item in the Oracle Workflow Builder. By default Responsible Id is set to STUDENT_FIN. Responsible Id can be changed to a valid user.

The Residency Change workflow can be customized as follows.

Required Modifications

No modifications are required to run the Residency Change workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Residency Change workflow process.

B.2.1.2 Address Change Workflow

Note: In order for the notification to be sent to the designated user, the user name RES_PERSON must be an active account with a valid email address when a student or person changes his or her address. An alternative is to update the Responsible Person attribute for the Address Change workflow item in the Oracle Workflow Builder. By default Responsible Id is set to RES_PERSON. Responsible Id can be changed to a valid user.

The Address Change workflow can be customized as follows.

Required Modifications

No modifications are required to run the Address Change workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Address Change workflow process.

B.2.1.3 Generate New User Workflow

The Generate New User workflow can be customized as follows.

Required Modifications

No modifications are required to run the Generate New User workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Generate New User workflow process.

B.2.1.4 Set or Release a Hold Workflow

The institution's third party software/external system raises an Oracle Student System designated business event in Oracle Workflow in order to insert/update a hold type into Oracle Student System.

After the external system raises the Set or Release External Hold business event, the subscribed workflow process of Set or Release a Hold will trigger the following process flow:

1. The external hold information is received by Oracle Student System.
2. Oracle Student System determines if the hold is to be created or updated.
3. The internal validations are processed for the record to be created or updated.
4. If the process is successful, then the workflow process terminates.
5. If the process fails, then an administrator is sent an email notification with the error text.

In addition, a business event will be raised for the failed process. The institution can customize their own workflow process for this business event in order to resolve the error/failure.

Required Modifications

No modifications are required to run the Set or Release a Hold workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Set or Release a Hold workflow process.

B.2.2 Business Events

The following table describes business events in Person.

Table B–3 Business Events for Person

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.pe.rescal. ac	Admission Application Creation event	Triggered when an application is created; can be used by institutions to create a user-defined process to calculate residency status	Oracle Student System	igs
oracle.apps.igs.pe.rescal. ai	Admission Application Import event	Triggered when an application is imported from an external source such as the common application; can be used by institutions to create a user-defined process to calculate residency status	Oracle Student System	igs
oracle.apps.igs.pe.rescal. io	Admission Application Import Outcome Decision event	Triggered when an application's outcome decision is imported; can be used by institutions to create a user-defined process to calculate residency status	Oracle Student System	igs
oracle.apps.igs.pe.rescal. os	Admission Outcome Status Update event	Triggered when an application outcome status is updated; can be used by institutions to create a user-defined process to calculate residency status	Oracle Student System	igs

Table B–3 Business Events for Person

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.pe.rescal. ss	Admission Self Service Application Creation event	Triggered when an application is submitted through self service; can be used by institutions to create a user-defined process to calculate residency status	Oracle Student System	igs
oracle.apps.igs.pe.genus r	Generate user name	Triggered when a user attempts the new user registration process in self service; can be used by institutions in conjunction with the Generate User name workflow to create a user name for a person to login through self service	Oracle Student System	igs
oracle.apps.igs.sv.ev.rece ive	SEVIS Exchange Visitor Request Processed	Triggered when concurrent process for Exchange Visitor is submitted. Processes SEVIS data	Oracle Student System	igs

Table B–3 Business Events for Person

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.sv.ev.submit	Submit Exchange Visitor Batch Request	Triggered when concurrent process for Exchange Visitor is submitted. Generates and sends Exchange visitor XML file	Oracle Student System	igs
oracle.apps.gis.sv.ni.receive	SEVIS Non Immigrant Request Processed	Triggered when concurrent process for Non Immigrant is submitted. Processes SEVIS data	Oracle Student System	igs
oracle.apps.igs.sv.ni.submit	Submit Non Immigrant Batch Request	Triggered when concurrent process for Non Immigrant is submitted. Generates and sends Non Immigrant XML file	Oracle Student System	igs

Note: All business events in Person are disabled except oracle.apps.igs.pe.genusr.

B.3 Admissions

B.3.1 Workflows

The following table describes workflows in Admissions.

Table B–4 Workflows for Admissions

Workflow	Item Type	Description	Owner Name	Owner Tag
ADAPPLIN/P_ INCMPLAPPL	N/A	Triggered by running the Incomplete Applications concurrent process for applicants with incomplete self-service applications	Oracle Student System	igs
ADPADMRQ/P_PST_ ADMRQ	N/A	Triggered by running the Send Notifications for Admission and Post Admission Requirements concurrent process	Oracle Student System	igs
ADADMREQ/P_ ADMREQ	N/A	Triggered by running the Admission Requirements concurrent process	Oracle Student System	igs

B.3.1.1 Incomplete Applications Workflow

The Incomplete Applications business event is raised for the applicant or applicants with incomplete self service applications. A sample Incomplete Applications workflow is triggered by the new business event. You can update this sample workflow.

The Incomplete Applications workflow notification will be sent as both an email message to the applicant, and as a notification in the Applicant Home page.

An applicant may have multiple incomplete applications. One email message should be sent for every time the workflow is initiated by the concurrent manager request, regardless of the number of incomplete applications the applicant may have. The workflow process may be initiated multiple times within a single period.

Required Modifications

No modifications are required to run the Incomplete Applications workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Incomplete Applications workflow process.

B.3.1.2 Admissions Requirements Workflow

The Admissions Requirements workflow notifies applicants that there are additional documents or missing items that are needed to complete the application.

Required Modifications

No modifications are required to run the Admissions Requirements workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Admissions Requirements workflow process.

B.3.1.3 Post Admission Requirements Workflow

The Post Admission Requirements workflow allows administrative users to notify applicants of the additional documents or missing items that are required by the institution even after the admission application process is complete.

Required Modifications

No modifications are required to run the Post Admissions Requirements workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Post Admissions Requirements workflow process.

B.3.2 Business Events

The following table shows business events for Admissions.

Table B–5 Business Events for Admissions

Workflow	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.ad.appl.incmpl_appl	Notify Applicant about Incomplete Applications	Triggered by running the Incomplete Applications concurrent process for applicants with incomplete self-service applications	Oracle Student System	igs
oracle.apps.igs.ad.appl.post_adm_req	Notify Applicants about Post Admission Requirements	Triggered by running the Send Notifications for Admission and Post Admission Requirements concurrent process	Oracle Student System	igs
oracle.apps.igs.ad.appl.adm_req	Notify Applicant about Admission Requirements	Triggered by running the Admission Requirements concurrent process	Oracle Student System	igs

B.4 Financial Aid

B.4.1 Workflows

The following describes workflows in Financial Aid.

Table B–6 Workflows for Financial Aid

Workflow	Item Type	Description	Owner Name	Owner Tag
IGFSLW01.wft	DLPNA	Triggered by Promissory Note Acknowledgement Process concurrent process which is part of the request set Direct Loan > Upload Promissory Note Acknowledgement; triggered if Loan's promissory note is rejected by the external processing agency	Oracle Student System	igf
IGFAPW01.wft	Load ISIR Records	Not used	Oracle Student System	igf
IGFAPW02.wft	Notify Changes in Student Information	Not used	Oracle Student System	igf
IGFAPW03.wft	TSTAPPS	Not used	Oracle Student System	igf

Table B–6 Workflows for Financial Aid

Workflow	Item Type	Description	Owner Name	Owner Tag
IGFAPW04.wft	Corrections Not Initiated by School	Triggered by the ISIR Import Process concurrent process; notifies users when an ISIR correction record is received which the school did not initiate	Oracle Student System	igf
IGFAPW05.wft	OSSDTLS	Triggered by many concurrent processes when the parameter of the concurrent processes Get Latest Information is Yes and data attributes are enabled for workflow in the Data Change Workflow Attributes window; notifies users when there are changes in student attributes as defined in OSS Data Change Workflow Notification setup	Oracle Student System	igf
IGFSEW01.wft	Student Employment Notification	Triggered by Student Employment Upload Payroll Information concurrent process and payroll details of the Student Work Award Progress window; notifies users if the amount resulting from the subtraction of the amount of a student's work-study award from the student's gross pay is within the threshold level	Oracle Student System	igf

B.4.1.1 DLPNA Workflow

The DLPNA workflow can be customized as follows.

Required Modifications

No modifications are required to run the DLPNA workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the DLPNA workflow process.

B.4.1.2 Corrections Not Initiated By School Workflow

The Corrections Not Initiated By School workflow can be customized as follows.

Required Modifications

No modifications are required to run the Corrections Not Initiated By School workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Corrections Not Initiated By School workflow process.

B.4.1.3 OSSDTLS Workflow

The OSSDTLS workflow can be customized as follows.

Required Modifications

No modifications are required to run the OSSDTLS workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the OSSDTLS workflow process.

B.4.1.4 Student Employment Notification Workflow

The Student Employment Notification workflow can be customized as follows.

Required Modifications

No modifications are required to run the Student Employment Notification workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Student Employment Notification workflow process.

B.4.2 Business Events

There are no business events in Financial Aid.

B.5 Enrollments

B.5.1 Workflows

There are no workflows in Enrollments.

B.5.2 Business Events

The following table describes the business events in Enrollments.

Table B–7 Business Events for Enrollments

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.en.wlst.m ailadm	N/A	Triggered when waitlisted student fails enrollment eligibility validations during auto-enrollment; can be used by institutions to create a user-defined process to notify users of students who fail enrollment eligibility during the automatic enrollment process	Oracle Student System	igs
oracle.apps.igs.en.wlst.m ailstud	N/A	Triggered when waitlisted student passes enrollment eligibility validations during auto-enrollment; can be used by institutions to create a user-defined process to notify users of students who pass enrollment eligibility during the automatic enrollment process	Oracle Student System	igs
oracle.apps.igs.en.infor m_stud	N/A	Triggered by any program attempted information is changed; can be used by institutions to create a user-defined process to notify users when any program attempt information is changed	Oracle Student System	igs
oracle.apps.igs.en.enrp.s tatmail	N/A	Triggered by a change in unit attempt status; can be used by institutions to create a user-defined process to notify users when there is a change in unit attempt status	Oracle Student System	igs

Table B–7 Business Events for Enrollments

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.en.enrp.instresp	N/A	Triggered when an instructor submits response to an audit permission or special permission request; can be used by institutions to create a user-defined process to notify students of instructor's response to special permission requests	Oracle Student System	igs
oracle.apps.igs.en.enrp.studreq	N/A	Triggered when a student submits and audit permission or special permission request; can be used by institutions to create a user-defined process to notify instructors of special permission requests	Oracle Student System	igs
oracle.apps.igs.en.dropnotification	N/A	Triggered when the student's unit attempt status is changed to Dropped or Discontinued as a result of the Bulk Discontinuation Process concurrent process	Oracle Student System	igs
oracle.apps.igs.en.dropnotification	N/A	Triggered when an administrator drops or discontinues a unit section and the student's unit attempt status changes to Dropped or Discontinued	Oracle Student System	igs
oracle.apps.igs.en.dropnotification	N/A	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for an intermitted program	Oracle Student System	igs
oracle.apps.igs.en.dropnotification	N/A	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for a discontinued program	Oracle Student System	igs

Table B–7 Business Events for Enrollments

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.en.dropnotification	N/A	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for a transferred program	Oracle Student System	igs
oracle.apps.igs.en.transfernotification	N/A	Triggered when a unit section is transferred	Oracle Student System	igs
oracle.apps.igs.en_be_en002	N/A	Triggered when a student is retrieved by the Minimum Credit Point Query window and the admin decides to notify the student	Oracle Student System	igs

B.6 Academic Records

B.6.1 Workflows

The following describes workflows in Academic Records.

Table B–8 Workflows for Academic Records

Workflow	Business Event	Item Type	Description	Owner Name	Owner Tag
IGSDA001.wft	oracle.apps.igs.d a.req	IGSDA001	degree audit request; raised event, verification, and notification	Oracle Student System	igs
IGSDA002.wft	oracle.apps.igs.d a.reqsubmit	IGSDA002	degree audit receive event from third party software	Oracle Student System	igs
IGSAS001.wft	oracle.apps.igs.as .infadmchg	ChangeGrade Request Workflow	notifies user who initiated change of grade request; seeks resolution of change of grade request for final and early final grading period from lead instructor of the unit section	Oracle Student System	igs

Table B–8 Workflows for Academic Records

Workflow	Business Event	Item Type	Description	Owner Name	Owner Tag
IGSAS002.wft	oracle.apps.igs.as .infadmgrd	GradeSubmiss ionNotificatio n	notifies lead instructor of unit section that final grades for unit is submitted	Oracle Student System	igs
IGSAS003.wft	oracle.apps.igs.as .infadmattdd	AttendanceSu bmissionNotif ication	notifies lead instructor of unit section that attendance for unit section is submitted	Oracle Student System	igs
IGSAS004.wft	N/A	OSS: Notify Admin about transcript production	Notify ADMIN about transcript production	Oracle Student System	igs
IGSAS005.wft	oracle.apps.igs.as .be_as004	OSS: Notify Student About Transcript production	Triggered when the system prints the academic records order placed by student	Oracle Student System	igs
IGSAS007.wft	N/A	OSS: Notify About Missing Academic Record	Triggered when a transcript request by a student or administrator indicates missing academic records	Oracle Student System	igs
IGSAS008.wft	oracle.apps.igs.as .orddoc.notstu	OSS: Missing Academic Record Transcript Production	Triggered when an administrator manually updates the details of a completion date of a missing academic records transcript	Oracle Student System	igs
IGSAS009.wft	oracle.apps.igs.as .TranscriptReq.n otify_hold	OSS: Notify students about transcript hold	Triggered when a transcript is requested by an administrator for a student who has a transcript hold	Oracle Student System	igs

B.6.1.1 Degree Audit Request Workflow

The Degree Audit Request workflow can be customized as follows.

Required Modifications

No modifications are required to run the Degree Audit Request workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Degree Audit Request workflow process.

B.6.1.2 Degree Audit Third Party Receipt Workflow

The Degree Audit Third Party Receipt workflow can be customized as follows.

Required Modifications

No modifications are required to run the Degree Audit Third Party Receipt workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Degree Audit Third Party Receipt workflow process.

B.6.1.3 Change Grade Request Workflow

The Change Grade Request workflow can be customized as follows.

Required Modifications

No modifications are required to run the Change Grade Request workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.
- Organizations can create new function activities.

Function activities can be used to send notifications to another person in an organization's hierarchy instead of the lead instructor.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Change Grade Request workflow process.

B.6.1.4 Grade Submission Workflow

The Grade Submission workflow can be customized as follows.

Required Modifications

No modifications are required to run the Grade Submission workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.
- Organizations can create new function activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Grade Submission workflow process.

B.6.1.5 Attendance Submission Workflow

The Attendance Submission workflow can be customized as follows.

Required Modifications

No modifications are required to run the Attendance Submission workflow process.

Optional Customizations

Organizations can make the following optional customizations:

- Organizations can create new messages. Messages are used for notification activities in the workflow process.
- Organizations can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.
- Organizations can create new function activities.

Creating a New Custom Process

It is not recommended that organizations create their own custom process to replace the Attendance Submission workflow process.

B.6.2 Business Events

The following table describes the business events in Academic Records.

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.as.infadmchg	Change Grade Submission, Final	Triggered from the Review Change of Grade self service screen for final and early final periods; linked to IGSAS001.wft, Change Grade Request Workflow	Oracle Student System	igs
oracle.apps.igs.as.infadmatt d	Attendance Submission	Triggered from the Review Attendance self service screen; linked to IGSAS003.wft, Attendance Submission Workflow	Oracle Student System	igs
oracle.apps.igs.as.infadmgr d	Grade Submission	Triggered from the Review Enter Grade self service screen; linked to IGSAS002.wft, Grade Submission Workflow	Oracle Student System	igs
oracle.apps.igs.as.infadmin cgrdsub	Incomplete Grade Submission	Triggered from the Enter Incomplete Grade self service screen; can be used by institutions to create a user-defined process to notify instructor about submitting an incomplete grade for student	Oracle Student System	igs
oracle.apps.igs.as.infadmin cgrd	Incomplete Grade Default	Triggered from the Assign Incomplete Grade concurrent process; can be used by institutions to create a user-defined process to notify instructor about the finalization of the default incomplete grade to a certain student	Oracle Student System	igs

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.as.attend.notify_advanced	Attendance Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about attendance submission dates	Oracle Student System	igs
oracle.apps.igs.as.attend.notify_start	Attendance Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that attendance submission period has started	Oracle Student System	igs
oracle.apps.igs.as.attend.notify_end	Attendance End	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that attendance submission period has ended	Oracle Student System	igs
oracle.apps.igs.final.notify_advanced	Final Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about final grading	Oracle Student System	igs

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.as.final.notify_start	Final Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the final grading period grade submission period has started	Oracle Student System	igs
oracle.apps.igs.as.final.notify_end	Final End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the final grading period grade submission period has ended	Oracle Student System	igs
oracle.apps.igs.as.earlyfinal.notify_advanced	Early Final Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her early final grading period grade submission dates	Oracle Student System	igs
oracle.apps.igs.as.earlyfinal.notify_start	Early Final Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the early final grading period grade submission period has started	Oracle Student System	igs

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.as.earlyfinal. notify_end	Early Final End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the early final grading period grade submission period has ended	Oracle Student System	igs
oracle.apps.igs.as.midterm. notify_advanced	Mid Term Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about mid term grading period grade submission dates	Oracle Student System	igs
oracle.apps.igs.as.midterm. notify_start	Mid Term Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that mid term grading period grade submission period has started	Oracle Student System	igs
oracle.apps.igs.as.midterm. notify_end	Mid Term End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that mid term grading period grade submission period has ended	Oracle Student System	igs

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.as.infadmgrmt	Grade Mid Term	Triggered from the Review Grade self service screen for mid term grading period; can be used by institutions to create a user-defined process to see resolution of grade submission for mid term grading period from lead instructor of unit section	Oracle Student System	igs
oracle.apps.igs.pr.clsrank.be_cr003	Ranking Process Complete Event	Triggered from completion of the Run Ranking Process concurrent process. The event contains the following details: <ul style="list-style-type: none"> ■ cohort name ■ cohort instance ■ run date ■ cohort total 	Oracle Student System	igs
oracle.apps.igs.pr.clsrank.be_cr001	Cohort Status Change Event	Triggered by class rank status change. The event contains the following details: <ul style="list-style-type: none"> ■ cohort name ■ cohort instance ■ new cohort status ■ new rank status 	Oracle Student System	igs

Table B–9 Business Events for Academic Records

Business Event	Item Type	Description	Owner Name	Owner Tag
oracle.apps.igs.pr.clsrank.be_cr002	Rank Override Event	<p>Triggered by overriding class rank. The event contains the following details:</p> <ul style="list-style-type: none"> ▪ student ID ▪ student name ▪ current rank ▪ override rank ▪ override comment ▪ person ID / name of person who entered override details 	Oracle Student System	igs
oracle.apps.igs.pr.approve_otcm	Approve Outcome	Triggered when a positive outcome is approved	Oracle Student System	igs
oracle.apps.igs.pr.apply_otcm	Apply Negative Outcome	Triggered when a negative outcome is applied against a student	Oracle Student System	igs
oracle.apps.igs.pr.apply_positive_otcm	Apply Positive Outcome	Triggered when a positive outcome is applied against a student	Oracle Student System	igs
oracle.apps.igs.pr.showcause_uph_dsm	Show Cause Upheld / Dismissed	Triggered when the show cause decision is upheld or denied	Oracle Student System	igs
oracle.apps.igs.pr.appeal_uph_dsm	Appeal Upheld / Dismissed	Triggered when the appeal decision is upheld or denied	Oracle Student System	igs
oracle.apps.igs.pr.remove_waive_cancel_otcm	Outcome Removed / Waived / Cancelled	Triggered when an outcome is removed, waived, or cancelled	Oracle Student System	igs

The following tables are in this appendix:

- Oracle Student System Extensible Lookups
- Oracle Student System User Lookups

C.3 Oracle Student System Extensible Lookups

The following describes Oracle Student System extensible lookups.

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
FEE_CLASS	Fee Class	BOOKS	Books
FEE_CLASS	Fee Class	COURSE	Program Fees
FEE_CLASS	Fee Class	HOUSING	Housing
FEE_CLASS	Fee Class	INSTITUTION	Institutional Fees
FEE_CLASS	Fee Class	STUDENT	Student Fees
FEE_CLASS	Fee Class	TUITION	Tuition
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	CONTINUING_EDUCATION	Continuing Education
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	ENCERT	Enrollment Certification

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	LIFE_TIME_TRANS	Lifetime Transcript Service
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	OFFICIAL	Official Transcript
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	OTHERS	Others
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	UNOFFICIAL	Unofficial Transcript
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2001	2001
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2002	2002
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2003	2003
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2004	2004
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2005	2005
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2006	2006
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2007	2007
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2008	2008
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2009	2009
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2010	2010
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	OSRI	Only Satisfied Requirements Included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	OURI	Only Unsatisfied Requirements Included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	SPEC	Special Software Defined

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	STND	Standard All Requirements Included
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	NINC	Reports With No Incomplete Requirements (If Ok)
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	NINP	Reports W/ No Incomplete Requirements (If Not Ok)
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SDEG	Special Defined Degree Audit
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SEVL	Special Software Defined Transfer Evaluation
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SINC	Reports With Some Incomplete Requirements Produced
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	STND	Standard All Reports Produced
IGS_DA_REF_ARTICS	Degree Audit Reference Articulation	EXCL	Do Not Include Reference Articulation
IGS_DA_REF_ARTICS	Degree Audit Reference Articulation	INCL	Include Reference Articulation
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	APRT	Athletics Progress Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	DCER	Degree Certification
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	DMPR	Declaration of Major Progress Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	HSOC	Honor Society
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	ORPT	Orientation Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	PGCK	Preliminary Graduation Check

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	RTEV	Reference Transfer Evaluation
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	SDAR	Special Degree Audit Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	SGER	State General Education Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	STD1	Standard Degree Audit - Declared Program
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	STD2	Std Deg Audit - Declared Program - Special, Best GPA
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	STD3	Std Deg Audit - Declared Program - Special, Worst GPA
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	STD4	Standard Degree Audit Progress Report - "What-if" Program
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	STER	Special Transfer Evaluation Report
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	TEST	Test
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	TEVA	Transfer Evaluation All Institutions
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	TEVO	Transfer Evaluation One Institution
IGS_DA_REQUEST_TYPES	Degree Audit Request Types	VSSR	Very Short Summary Report
IGS_DA_RPT_COLUMNS	Degree Audit Report Columns	ONE	One Column
IGS_DA_RPT_COLUMNS	Degree Audit Report Columns	TWO	Two Columns
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	COLR	Color Report

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	EXTD	Extended Report
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SHRT	Short Report - No List of Select or Reject Units
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SPTC	Standard Report Special Technical
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SPTR	Standard Report Special Transfer Evaluation
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	STND	Standard Report
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	VSHT	V. Short Report Requirement Titles and Status Only
IGS_ETHNIC_ORIGIN	Ethnic Origin for Student System	OTHER	Others
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	ADJ	Negative Charge Adjustment type
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	AID	Aid
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CASH	Cash
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CC	Credit Card
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CHECK	Check
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	DEPOSIT	Deposit
IGS_FI_REVERSAL_REASON	Reversal Reason	NSF	Not Sufficient Fund
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	ADM	Admission Application
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	DEPOSIT	Deposit

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_FI_WAIVER_REASON	Waiver Reason	MANUAL_REFUND	Manual reversal of refund voucher
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	A	Accept
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	B	Bulk Reject
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	C	Conditional Offer
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	E	Reject as not qualified in English
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	F	Fully booked (all intakes full)
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	G	Course closed after the applicant applied
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	I	Notification of Interview
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	M	Reject as not qualified in Mathematics
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	R	Reject
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	S	Rejection / Recruitment suspended
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	U	Unconditional Offer
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	W	Withdrawn
IGS_UC_APP_DECISION	IGS_UC_APP_DECISION	X	Form to be returned to GTTR
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	MANUAL	Manually changed
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	SELSERVICE	Uploaded from Self Service Screen
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	UPLOAD	Uploaded from Web ADI spreadsheet

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
OR_ACCR_STATUS	OR_ACCR_STATUS	ACCRED	Accredited Status
OR_ACCR_STATUS	OR_ACCR_STATUS	NON-ACCRED	Non-Accredited Status
OR_ACCR_STATUS	OR_ACCR_STATUS	PENDING	Pending
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	NON-PROFIT	Non-Profit Agency
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PRIVATE	Private Institution
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PUBLIC	Public Institution
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	HIGH	High Priority
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	LOW	Low Priority
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	MEDIUM	Medium Priority
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	EPS_FIRST_GEN	EPS First Generation Test Takers
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	GRAD_PERCENT	Percent of Students Graduating
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	TEST_TAKE_PERCENT	Percent of Students Taking Test
OR_MEMBER_TYPE	OR_MEMBER_TYPE	COLLEGE	College
OR_MEMBER_TYPE	OR_MEMBER_TYPE	DEPART	Department
OR_MEMBER_TYPE	OR_MEMBER_TYPE	DIVISION	Division
OR_MEMBER_TYPE	OR_MEMBER_TYPE	SCHOOL	School
OR_ORG_TYPE	OR_ORG_TYPE	ACAD	Academic Organization
OR_ORG_TYPE	OR_ORG_TYPE	ADMIN	Administrative Organization
PAYMENT_MODE	Payment Mode	CHECK	Check
PAYMENT_MODE	Payment Mode	EFT	Electronic Fund Transfer
PERSON_ID_TYPE	Person Id Type	DRIVER_LIC	Driver's License Number

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
PERSON_ID_TYPE	Person Id Type	MERGE-INT O	Obsolete Person's Details Merged Into Person Id
PERSON_ID_TYPE	Person Id Type	OBSOLETE	Person's Details Merged From Obsolete Person Id
PERSON_ID_TYPE	Person Id Type	OLAA	Old Student Id
PERSON_ID_TYPE	Person Id Type	OTHER	Other
PERSON_ID_TYPE	Person Id Type	PAY_ADV_ NO	Payment Advice Number
PERSON_ID_TYPE	Person Id Type	SEVIS_ID	SEVIS User ID
PERSON_ID_TYPE	Person Id Type	SSN	Social Security Number
PERSON_ID_TYPE	Person Id Type	STAFF	Staff Member Id
PERSON_ID_TYPE	Person Id Type	TAC	Academic History Admission Center Student Id
PERSON_ID_TYPE	Person Id Type	TAXID	Taxpayer ID
PERSON_PRIVACY_ RELEASE	Person Privacy Release	ALL	All
PE_NOTE_TYPE	Person Note Types	BELOW_ FULL_LOAD	Drop Below Full Load
PE_NOTE_TYPE	Person Note Types	RET_FULL_ LOAD	Return to Full Load
PR_EXTERNAL_STAT_ SOURCE	External Statistics Source	DEGREE AUDIT	Degree Audit
PR_EXTERNAL_STAT_ SOURCE	External Statistics Source	INTERNAL	Internal
PR_EXTERNAL_STAT_ SOURCE	External Statistics Source	OTHER	Other
VETERAN_STATUS	VETERAN_STATUS	VETERAN	Veteran
VETERAN_STATUS	VETERAN_STATUS	VETERAN_ DEP	Dependant of a Veteran
VETERAN_STATUS	VETERAN_STATUS	VETERAN_ NOT	Not a Veteran

Table C–2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_AP_STATE_CODES	State Codes	AA	Military location code AA
IGF_AP_STATE_CODES	State Codes	AE	Military location code AE
IGF_AP_STATE_CODES	State Codes	AK	Alaska
IGF_AP_STATE_CODES	State Codes	AL	Alabama
IGF_AP_STATE_CODES	State Codes	AP	Military location code AP
IGF_AP_STATE_CODES	State Codes	AR	Arkansas
IGF_AP_STATE_CODES	State Codes	AS	American Samoa
IGF_AP_STATE_CODES	State Codes	AZ	Arizona
IGF_AP_STATE_CODES	State Codes	BL	Blank or Invalid State
IGF_AP_STATE_CODES	State Codes	CA	California
IGF_AP_STATE_CODES	State Codes	CN	Canada
IGF_AP_STATE_CODES	State Codes	CO	Colorado
IGF_AP_STATE_CODES	State Codes	CT	Connecticut
IGF_AP_STATE_CODES	State Codes	DC	District Of Columbia
IGF_AP_STATE_CODES	State Codes	DE	Delaware
IGF_AP_STATE_CODES	State Codes	FC	Foreign country other than (Canada or Mexico)
IGF_AP_STATE_CODES	State Codes	FL	Florida
IGF_AP_STATE_CODES	State Codes	FM	Federated States of Micronesia
IGF_AP_STATE_CODES	State Codes	GA	Georgia
IGF_AP_STATE_CODES	State Codes	GU	Guam
IGF_AP_STATE_CODES	State Codes	HI	Hawaii
IGF_AP_STATE_CODES	State Codes	IA	Iowa
IGF_AP_STATE_CODES	State Codes	ID	Idaho
IGF_AP_STATE_CODES	State Codes	IL	Illinois
IGF_AP_STATE_CODES	State Codes	IN	Indiana

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_AP_STATE_CODES	State Codes	KS	Kansas
IGF_AP_STATE_CODES	State Codes	KY	Kentucky
IGF_AP_STATE_CODES	State Codes	LA	Louisiana
IGF_AP_STATE_CODES	State Codes	MA	Massachusetts
IGF_AP_STATE_CODES	State Codes	MD	Maryland
IGF_AP_STATE_CODES	State Codes	ME	Maine
IGF_AP_STATE_CODES	State Codes	MH	Marshall Islands
IGF_AP_STATE_CODES	State Codes	MI	Michigan
IGF_AP_STATE_CODES	State Codes	MN	Minnesota
IGF_AP_STATE_CODES	State Codes	MO	Missouri
IGF_AP_STATE_CODES	State Codes	MP	Northern Mariana Islands
IGF_AP_STATE_CODES	State Codes	MS	Mississippi
IGF_AP_STATE_CODES	State Codes	MT	Montana
IGF_AP_STATE_CODES	State Codes	MX	Mexico
IGF_AP_STATE_CODES	State Codes	NC	North Carolina
IGF_AP_STATE_CODES	State Codes	ND	North Dakota
IGF_AP_STATE_CODES	State Codes	NE	Nebraska
IGF_AP_STATE_CODES	State Codes	NH	New Hampshire
IGF_AP_STATE_CODES	State Codes	NJ	New Jersey
IGF_AP_STATE_CODES	State Codes	NM	New Mexico
IGF_AP_STATE_CODES	State Codes	NV	Nevada
IGF_AP_STATE_CODES	State Codes	NY	New York
IGF_AP_STATE_CODES	State Codes	OH	Ohio
IGF_AP_STATE_CODES	State Codes	OK	Oklahoma
IGF_AP_STATE_CODES	State Codes	OR	Oregon
IGF_AP_STATE_CODES	State Codes	OT	Other

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_AP_STATE_CODES	State Codes	PA	Pennsylvania
IGF_AP_STATE_CODES	State Codes	PR	Puerto Rico
IGF_AP_STATE_CODES	State Codes	PW	Republic of Palau
IGF_AP_STATE_CODES	State Codes	RI	Rhode Island
IGF_AP_STATE_CODES	State Codes	SC	South Carolina
IGF_AP_STATE_CODES	State Codes	SD	South Dakota
IGF_AP_STATE_CODES	State Codes	TN	Tennessee
IGF_AP_STATE_CODES	State Codes	TX	Texas
IGF_AP_STATE_CODES	State Codes	UT	Utah
IGF_AP_STATE_CODES	State Codes	VA	Virginia
IGF_AP_STATE_CODES	State Codes	VI	U.S. Virgin Islands
IGF_AP_STATE_CODES	State Codes	VT	Vermont
IGF_AP_STATE_CODES	State Codes	WA	Washington
IGF_AP_STATE_CODES	State Codes	WI	Wisconsin
IGF_AP_STATE_CODES	State Codes	WV	West Virginia
IGF_AP_STATE_CODES	State Codes	WY	Wyoming
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	0	Not in Use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	1	Disbursement Cancellation not allowed.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	10	Gross amount does not match the LOC amount.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	11	Disbursement fee is invalid.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	12	Gross amount is invalid.

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	13	Adjustment amount is invalid.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	14	Adjustment amount not valid for activity type.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	15	Disbursement fee contains invalid characters.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	16	Disbursement Sequence Number must be sequential
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	17	Invalid Adjustment Disbursement Date. No record at LOC
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	18	18-Not in use
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	19	19-Not in use
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	2	School is currently a Non-participating school.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	20	Adjusted Disbursement Date cannot be changed to future date.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	21	Inactive MPN.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	22	Adjustment Date should be within 120 days of actual date
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	23	Invalid Adjustment Disbursement Date

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	24	Disbursement Amount >Maximum Annual Loan Limit
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	25	Disbursement exceeds accepted amount by LOC
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	26	Affirmation required prior to disbursement.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	27	First Actual Disbursement must be received first.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	28	First Actual Disbursement Date must be prior to other
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	29	PLUS Loan disbursement number must be 01-04.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	3	3-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	30	Fee on disbursement amount does not match fee on LOR.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	31	Invalid disbursement number. Must be a number from 01 to 20.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	32	32-Not in Use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	4	Discrepancy being researched by the LOC.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	5	Different Year Record(s) in Batch Message Class Received.

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	6	Gross disbursement amount does not match the LOC amount.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	7	Net amount does not match the LOC amount.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	8	Net amount invalid for disbursement Activity.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	9	Fee amount does not match the LOC amount.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	A	A-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	B	B-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	C	C-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	D	D-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	E	Invalid Disbursement Activity. Must be A,D or Q.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	F	Disbursement Sequence Number is not Numeric.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	G	Total Gross Disbursements cannot be > Loan Amount Approved
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	H	Reported Amount does not match the LOC Amount.

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	I	I-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	J	Credit Check not yet approved for this PLUS loan.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	K	No Disbursement Record found for this adjustment.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	L	Unsatisfactory Eligibility Conditions.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	M	Duplicate Disbursement. Disbursement Number already on file.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	N	N-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	O	O-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	P	Duplicate adjustment transaction.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	Q	Disbursement date outside of allowable window.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	R	Disbursement date cannot be in the future.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	S	S-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	T	Must have valid Promissory Note (Option 1/Origination)

Table C-2 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	U	Loan ID not in origination table.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	V	Action date not a valid date.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	W	W-Not in use.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	X	School code not found in school table or school code invalid.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	Y	Action rejected as school closed / different ownership.
IGF_DB_DL_REJ_CODES	Direct Loan Disbursement Error Codes	Z	School code does not match school code in origination record.
IGF_DB_DL_SCH_CODE_STATUS	Direct Loan School Code Status at LOC	I	Invalid School Code

C.4 Oracle Student System User Lookups

The following describes Oracle Student System user lookups.

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
DEPOSIT_LEVELS	Deposit Levels	ALL	All
DEPOSIT_LEVELS	Deposit Levels	APPL	Application Only
DEPOSIT_LEVELS	Deposit Levels	PROGRAM	Program
DEPOSIT_LEVELS	Deposit Levels	PROGRAM_TYPE	Program Type
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	0	Main Record
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	1	Low Credit Bearing Course
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	2	Reduced FE record
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	3	Visiting and Exchange students
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	4	Dormant students
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	5	Late Return of Results
IGS_HE_RECID_SEG2	IGS_HE_RECID_SEG2	6	Welsh for adults
IGS_HE_RED_RTN	IGS_HE_RED_RTN	1	Low Credit Bearing Course
IGS_HE_RED_RTN	IGS_HE_RED_RTN	5	Late Return of Results
IGS_HE_RED_RTN	IGS_HE_RED_RTN	6	Welsh for adults
IGS_UC_ABBREV_USAGE	IGS_UC_ABBREV_USAGE	U	Unconditional
IGS_UC_ABBREV_USAGE	IGS_UC_ABBREV_USAGE	W	Withdrawals
IGS_UC_ACCEPT_CEF_COPY	IGS_UC_ACCEPT_CEF_COPY	Y	Application forms for Clearing accept

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_APPL_SOURCE	IGS_UC_APPL_SOURCE	D	Direct
IGS_UC_APPL_SOURCE	IGS_UC_APPL_SOURCE	U	UCAS
IGS_UC_APP_REPLY	IGS_UC_APP_REPLY	D	Decline
IGS_UC_APP_REPLY	IGS_UC_APP_REPLY	F	Firm
IGS_UC_APP_REPLY	IGS_UC_APP_REPLY	I	Insurance
IGS_UC_APP_REPLY	IGS_UC_APP_REPLY	P	Provisional
IGS_UC_APP_WITHDRAWN	IGS_UC_APP_WITHDRAWN	C	Candidate Withdrew
IGS_UC_APP_WITHDRAWN	IGS_UC_APP_WITHDRAWN	R	Reinstated
IGS_UC_APP_WITHDRAWN	IGS_UC_APP_WITHDRAWN	W	UF Withdrawal
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	0	Route B supplementary forms sent
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	1	Round 1 sent
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	2	Round 2 sent
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	3	Round 3 sent
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	5	No more supplementary forms
IGS_UC_B_TIME_OF_YEAR	IGS_UC_B_TIME_OF_YEAR	6	No more send-off
IGS_UC_CAMPUS_USED	IGS_UC_CAMPUS_USED	C	Campus Codes used
IGS_UC_CLEARING_SOURCE	IGS_UC_CLEARING_SOURCE	N	Newspaper
IGS_UC_CLEARING_SOURCE	IGS_UC_CLEARING_SOURCE	O	Other

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_COND_STATUS	IGS_UC_COND_STATUS	A	Passed
IGS_UC_COND_STATUS	IGS_UC_COND_STATUS	F	Failed
IGS_UC_COND_STATUS	IGS_UC_COND_STATUS	N	Not requested
IGS_UC_COND_STATUS	IGS_UC_COND_STATUS	P	Pending
IGS_UC_COURSE_ANALYSIS	IGS_UC_COURSE_ANALYSIS	1	Monthly in course order
IGS_UC_COURSE_ANALYSIS	IGS_UC_COURSE_ANALYSIS	2	Fortnightly in course order
IGS_UC_COURSE_ANALYSIS	IGS_UC_COURSE_ANALYSIS	3	Monthly in faculty order
IGS_UC_COURSE_ANALYSIS	IGS_UC_COURSE_ANALYSIS	4	Fortnightly in faculty order
IGS_UC_D3_DOC_REQUIRED	IGS_UC_D3_DOC_REQUIRED	N	No D3 Decision Documents
IGS_UC_D3_DOC_REQUIRED	IGS_UC_D3_DOC_REQUIRED	Y	D3 Decision Documents required
IGS_UC_DECISION_CARDS	IGS_UC_DECISION_CARDS	A	Online Decision cards
IGS_UC_DECISION_CARDS	IGS_UC_DECISION_CARDS	B	D1 documents (D4 clearing)
IGS_UC_EBL_1OR2_BOARD	IGS_UC_EBL_1OR2_BOARD	F	EBL1/2 fully combined
IGS_UC_EBL_1OR2_BOARD	IGS_UC_EBL_1OR2_BOARD	S	EBL1/2 separate boards
IGS_UC_EBL_1OR2_MERGED	IGS_UC_EBL_1OR2_MERGED	N	EBL1 and EBL2 separate
IGS_UC_EBL_1OR2_MERGED	IGS_UC_EBL_1OR2_MERGED	Y	EBL1 and EBL 2 merged

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_EBL_3_BOARD	IGS_UC_EBL_3_BOARD	C	EBL3 combined boards
IGS_UC_EBL_3_BOARD	IGS_UC_EBL_3_BOARD	F	EBL3 fully combined boards
IGS_UC_EBL_3_BOARD	IGS_UC_EBL_3_BOARD	S	EBL3 separate boards
IGS_UC_EBL_FINAL_KEY	IGS_UC_EBL_FINAL_KEY	A	Alpha
IGS_UC_EBL_FINAL_KEY	IGS_UC_EBL_FINAL_KEY	B	Board Reference (Center / Candidate)
IGS_UC_EBL_FINAL_KEY	IGS_UC_EBL_FINAL_KEY	N	App. Reference Number
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	C	Course
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	F	Faculty
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	G	Grouped June Category
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	J	June Category
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	S	Sex
IGS_UC_EBL_KEY	IGS_UC_EBL_KEY	Y	Year of Entry
IGS_UC_EBL_MEDIA_1OR2	IGS_UC_EBL_MEDIA_1OR2	L	EBL printed
IGS_UC_EBL_MEDIA_1OR2	IGS_UC_EBL_MEDIA_1OR2	T	EBL on magnetic tape
IGS_UC_EBL_MEDIA_3	IGS_UC_EBL_MEDIA_3	L	EBL printed
IGS_UC_EBL_MEDIA_3	IGS_UC_EBL_MEDIA_3	O	EBL online
IGS_UC_EBL_MEDIA_3	IGS_UC_EBL_MEDIA_3	T	EBL on magnetic tape
IGS_UC_EBL_NC_APP	IGS_UC_EBL_NC_APP	N	None committed applicants excluded
IGS_UC_EBL_NC_APP	IGS_UC_EBL_NC_APP	Y	None committed applicants required

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_EBL_REQUIRED	IGS_UC_EBL_REQUIRED	A	EBL1, EBL2 and EBL3 required
IGS_UC_EBL_REQUIRED	IGS_UC_EBL_REQUIRED	N	No EBL required
IGS_UC_EBL_REQUIRED	IGS_UC_EBL_REQUIRED	P	EBL2 and EBL3 required
IGS_UC_EBL_REQUIRED	IGS_UC_EBL_REQUIRED	R	Only EBL3 required
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	A	Alpha
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	B	Course/Alpha
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	D	Faculty/Alpha
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	E	Faculty/Course/Alpha
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	N	Application Number
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	P	Course / Application Number
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	R	Faculty/Application Number
IGS_UC_ETHNIC_LIST_SEQ	IGS_UC_ETHNIC_LIST_SEQ	T	Faculty/Course/Applica tion Number
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	A001	Error in import process while creating/updating application
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	A002	OSS Program Offering Option mapping not found
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	A003	The Unit Set Code for matching Point Of Entry not found

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D001	Error while importing an application decision
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D002	Application instance for UCAS decision Export not found
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D003	UCAS system decision not mapped to user outcome status
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D004	Cannot update Outcome status for Complete application status
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D005	Admission Decision import not required
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D006	The decision setting transaction does not map to Status
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	D007	Bulk reject decision can not be applied
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	O001	Error while incrementing preference number
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	O002	Error in Decision import Process
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	O003	More than one application instance are active for the choice
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	R001	Error while importing Offer response status
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	R002	Application instance for exporting UCAS reply not found
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	R003	Mapping not found for System decision and reply combination
IGS_UC_EXP_APP_ERROR	IGS_UC_EXP_APP_ERROR	R004	The offer response cannot be set

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	AC	Application choice export complete
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	AP	Application choice export: import tables populated
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	COMP	Application reply export process complete
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	DC	Application decision export complete
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	DP	Decision export: Import tables populated
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	ENQ	UCAS EXTRA or Clearing Enquiry - not to be imported to OSS
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	NEW	Application choice has not been exported to OSS
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	OC	Obsolete application process completed successfully
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	OO	Obsolete Application: User outcome status populated
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	OP	Obsolete Application: Incremental preference number
IGS_UC_EXP_APP_STATUS	IGS_UC_EXP_APP_STATUS	RP	Reply export: import tables populated
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	A	Alpha
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	B	Course/Alpha
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	D	Faculty/Alpha
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	E	Faculty/Course/Alpha
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	N	Application Number

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	P	Course/Application Number
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	R	Faculty/Application Number
IGS_UC_FORM_SEQ	IGS_UC_FORM_SEQ	T	Faculty/Course/Applica tion Number
IGS_UC_INST_TYPE	IGS_UC_INST_TYPE	A	Route A only
IGS_UC_INST_TYPE	IGS_UC_INST_TYPE	B	Route B only
IGS_UC_INST_TYPE	IGS_UC_INST_TYPE	C	Route A and B
IGS_UC_INTERFACE_ TYPE	IGS_UC_ INTERFACE_ TYPE	H	Hercules Interface
IGS_UC_INTERFACE_ TYPE	IGS_UC_ INTERFACE_ TYPE	M	Marvin Interface
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	A	Alpha
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	B	Course/ Alpha
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	D	Faculty/ Alpha
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	E	Faculty/Course/ Alpha
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	N	Application Number
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	P	Course/Application Number
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	R	Faculty/Application Number
IGS_UC_JUNE_LABELS	IGS_UC_JUNE_ LABELS	T	Faculty/Course/Applica tion Number
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_ SEQ	A	Alpha
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_ SEQ	B	Course/ Alpha

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	D	Faculty/Alpha
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	E	Faculty/Course/Alpha
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	N	Application Number
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	P	Course/Application Number
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	R	Faculty/Application Number
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	T	Faculty/Course/Applica tion Number
IGS_UC_JUNE_LIST_SEQ	IGS_UC_JUNE_LIST_SEQ	X	Faculty/Course/Categor y/Application Number
IGS_UC_JUNE_NUM_LABELS	IGS_UC_JUNE_NUM_LABELS	1	1 set labels
IGS_UC_JUNE_NUM_LABELS	IGS_UC_JUNE_NUM_LABELS	2	2 set labels
IGS_UC_LABELS	IGS_UC_LABELS	1	1 Label
IGS_UC_LABELS	IGS_UC_LABELS	2	2 Labels
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	A	A
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	B	B
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	C	C
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	D	D
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	E	E
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	F	F

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_LETTER_FORMAT	IGS_UC_LETTER_FORMAT	G	G
IGS_UC_MONTHLY_PAGE	IGS_UC_MONTHLY_PAGE	N	No paging at major key change
IGS_UC_MONTHLY_PAGE	IGS_UC_MONTHLY_PAGE	Y	Paging at major key change
IGS_UC_MONTHLY_PAPER	IGS_UC_MONTHLY_PAPER	1	1 part paper
IGS_UC_MONTHLY_PAPER	IGS_UC_MONTHLY_PAPER	2	2 part paper
IGS_UC_MONTHLY_TYPE	IGS_UC_MONTHLY_TYPE	I	Information List
IGS_UC_MONTHLY_TYPE	IGS_UC_MONTHLY_TYPE	M	Monthly List
IGS_UC_ODL	IGS_UC_ODL	A	Alpha
IGS_UC_ODL	IGS_UC_ODL	B	Course/ Alpha
IGS_UC_ODL	IGS_UC_ODL	D	Faculty/ Alpha
IGS_UC_ODL	IGS_UC_ODL	E	Faculty/Course/Alpha
IGS_UC_ODL	IGS_UC_ODL	N	Application Number
IGS_UC_ODL	IGS_UC_ODL	P	Course/Application Number
IGS_UC_ODL	IGS_UC_ODL	R	Faculty/Application Number
IGS_UC_ODL	IGS_UC_ODL	T	Faculty/Course/Applica tion Number
IGS_UC_RECORD_CARDS	IGS_UC_RECORD_CARDS	1	1 record card
IGS_UC_RECORD_CARDS	IGS_UC_RECORD_CARDS	2	2 record cards
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	E	England

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	I	Irish Republic
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	N	Northern Ireland
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	O	Other
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	S	Scotland
IGS_UC_SCH_COUNTRY	IGS_UC_SCH_COUNTRY	W	Wales
IGS_UC_SITTING	IGS_UC_SITTING	S	Summer
IGS_UC_SITTING	IGS_UC_SITTING	W	Winter
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	0	Not Known
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	1	Professional
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	2	Managerial/Technical
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	3	Skilled - Non Manual
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	4	Skilled - Manual
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	5	Partly Skilled
IGS_UC_SOCIAL_CLASS	IGS_UC_SOCIAL_CLASS	6	Unskilled
IGS_UC_SUBSTITUTION	IGS_UC_SUBSTITUTION	1	Substitution up to 15/Dec
IGS_UC_SUBSTITUTION	IGS_UC_SUBSTITUTION	2	Substitution after 15/Dec
IGS_UC_SUBSTITUTION	IGS_UC_SUBSTITUTION	3	Substitution after 16/May

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_SUBSTITUTION	IGS_UC_SUBSTITUTION	C	Substitution in Confirmation
IGS_UC_TIME_OF_YEAR	IGS_UC_TIME_OF_YEAR	A	Clearing Entry forms sent to applicants
IGS_UC_TIME_OF_YEAR	IGS_UC_TIME_OF_YEAR	C	Clearing started
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	LA	Amended Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	LC	Course Correction
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	LD	First Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	LE	Institution EXTRA Choice
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	LK	Stop Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	PE	Enquiry Transaction
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RA	UF Amendment
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RD	Confirmation Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RE	E Request
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RK	Stop Confirmation Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RQ	Clearing Form Request
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RR	Release into Clearing
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RW	UF Withdrawal
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	RX	Clearing Decision

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	XA	Experimental Amended Decision
IGS_UC_TRAN_TYPE	IGS_UC_TRAN_TYPE	XD	Experimental First Decision
IGS_UC_UCAS_STATUS	IGS_UC_UCAS_STATUS	C	Closed
IGS_UC_UCAS_STATUS	IGS_UC_UCAS_STATUS	L	Live
IGS_UC_UCAS_STATUS	IGS_UC_UCAS_STATUS	M	Merged
IGS_UC_UCAS_STATUS	IGS_UC_UCAS_STATUS	N	Not Live
IGS_UC_VAC_STATUS	IGS_UC_VAC_STATUS	N	Closed
IGS_UC_VAC_STATUS	IGS_UC_VAC_STATUS	O	Overseas only
IGS_UC_VAC_STATUS	IGS_UC_VAC_STATUS	Y	Opened to all applicants
IGS_UC_VALIDITY	IGS_UC_VALIDITY	D	Discontinued
IGS_UC_VALIDITY	IGS_UC_VALIDITY	R	Running
IGS_UC_WEEKLY_MOV_PAG	IGS_UC_WEEKLY_MOV_PAG	N	No paging major key change
IGS_UC_WEEKLY_MOV_PAG	IGS_UC_WEEKLY_MOV_PAG	Y	Paging to major key change
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	A	Alpha
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	B	Course/Alpha
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	D	Faculty/Alpha
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	E	Faculty/Course/Alpha

Table C-3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	N	Application Number
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	P	Course/Application Number
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	R	Faculty/Application Number
IGS_UC_WEEKLY_MOV_SEQ	IGS_UC_WEEKLY_MOV_SEQ	T	Faculty/Course/Application Number
PERSON_INTERNATIONAL_DETAILS	Person International Details	CITIZENSHIP_DOC_TYPE	Citizenship Document Type
PERSON_INTERNATIONAL_DETAILS	Person International Details	PARTY_RELATIONS_TYPE	Party Relation Type
PERSON_INTERNATIONAL_DETAILS	Person International Details	PE_FUND_TYPE	Person Fund Type
IGF_AP_INC_REASON	IGF_AP_INC_REASON	UNSIGNED	Not Signed
IGF_AP_REQ_CODE	IGF_AP_REQ_CODE	AW	Award Processing
IGF_AP_REQ_CODE	IGF_AP_REQ_CODE	SL	Loan Processing
IGF_GR_ENRL_STAT	Enrollment Status - Obsolete	01	Other - Obsolete
IGF_GR_ENRL_STAT	Enrollment Status - Obsolete	02	Less than half time - Obsolete
IGF_GR_ENRL_STAT	Enrollment Status - Obsolete	03	Half time - Obsolete
IGF_GR_ENRL_STAT	Enrollment Status - Obsolete	04	Three Quarter - Obsolete
IGF_GR_ENRL_STAT	Enrollment Status - Obsolete	05	Full time - Obsolete
IGF_MATCH_CRITERIA	Application Process Match Criteria	SSN	SSN

Table C–3 Oracle Student System User Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_MATCH_CRITERIA	Application Process Match Criteria	SSN_DOB	SSN, Date of Birth
IGF_MATCH_CRITERIA	Application Process Match Criteria	SSN_LNAME	SSN, Last Name
IGF_MATCH_CRITERIA	Application Process Match Criteria	SSN_LNAME_DOB	SSN, Last Name, Date of Birth
IGF_SE_PAYMENT	XXX_IGF_SE_PAYMENT_XXX	MANUAL	Record source was Manual entry
IGF_SE_PAYMENT	XXX_IGF_SE_PAYMENT_XXX	UPDATE	This record information is Updated
IGF_SE_PAYMENT	XXX_IGF_SE_PAYMENT_XXX	UPLOAD	Record source was Upload
YES_NO	Yes and No	N	No
YES_NO	Yes and No	Y	Yes

Window Name-Reference Number Guide

D.1 Window Name-Number-Subsystem Reference

The following table lists the window names and the corresponding reference numbers in Oracle Student System.

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Admissions Conditional Offer Status	IGSAD011	Admissions
Admissions Outcome Status	IGSAD010	Admissions
Account Hierarchy	IGSFI057	Student Finance
Account Hierarchy: Account Hierarchy Order	IGSFI058	Student Finance
Activity Type	IGSPS117	Program Structure and Planning
AD Form Function	FNDMFUN	N/A
AD Menus	FNDMNMNU	N/A
Administrative Unit Statuses	IGSEN001	Enrollments
Admission Application Note Types	IGSAD067	Admissions
Admission Calendar Configuration	IGSAD018	Admissions
Admission Category	IGSAD036	Admissions
Admission Codes	IGSAD003	Admissions

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Admission Entry Qualification Status	IGSAD007	Admissions
Admission Fee Information	IGSAD058	Admissions
Admission Fee Status	IGSAD006	Admissions
Admission Offer Deferment Status	IGSAD013	Admissions
Admission Offer Response Status	IGSAD012	Admissions
Admission Period Calendars	IGSAD043	Admissions
Admission Period Date Overrides	IGSAD044	Admissions
Admission Process Category Detail	IGSAD037	Admissions
Admission Process Category Tracking Rule	IGSAD079	Admissions
Admission Processing Status	IGSAD005	Admissions
Admission Test Types	IGSAD025	Admissions
Admission Unit Outcome Status	IGSAD008	Admissions
Advanced Standing Configuration Details	IGSAV001	Records: Advanced Standing
Anonymous Grading Method	IGSAS038	Records: Assessments
Applicant Goals	IGSAD058	Admissions
Application Completion Status	IGSAD009	Admissions
Application Detail Codes	IGSAD058	Admissions
Application Hierarchies	IGSFI053	Student Finance
Application Review Profile	IGSAD089	Admissions

Table D-1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Apply Unit Sets to Program Offerings	IGSPS066	Program Structure and Planning
Approved Assessment Item Grading Schema	IGSAS037	Records: Assessments
AR Descriptive Flexfield Segments	FNDFFMDC	N/A
Assessment Calendar Configuration	IGSAS008	Records: Assessments
Assessment Items	IGSAS009	Records: Assessments
Assessment Items - Complete List of All Assessment Item Examination Materials	IGSAS010	Records: Assessments
Assessment Type Government Score Mapping	IGSAD022	Admissions
Assessment Types	IGSAS001	Records: Assessments
Assessor Types	IGSAS004	Records: Assessments
Asset Protection Allowance	IGFAP042	Financial Aid
Assign Enrollment Session Timeslots	IGSEN049	Enrollments
Assign/Override Faculty Workload	IGSPS129	Program Structure and Planning
Attendance Entry Configuration Setup	IGSAS033	Records: Assessments
Attendance Type	IGSPS006	Program Structure and Planning
AutoInvoice Grouping Rules	RAXDEFGR	N/A
AutoInvoice Line Ordering Rules	RAXINLOR	N/A
Award Ceremony	IGSGR008	Records: Graduation
Award Groups	IGFAW011	Financial Aid

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Award Revision Reasons	IGFAW024	Financial Aid
Awards	IGSPS008	Program Structure and Planning
Balance Rules	IGSFI044	Student Finance
Basic Program Details I	IGSPS013	Program Structure and Planning
Basic Unit Details - Anonymous Grading Check box only	IGSPS013	Records: Assessments
Basic Unit Details - Create Occurrence	IGSPS047	Program Structure and Planning
Basic Unit Details - Planned to Active	IGSPS047	Program Structure and Planning
Basic Unit Set Details	IGSPS065	Program Structure and Planning
Basis for Admission Types	IGSAD002	Admissions
Batch Year Mappings	IGFAP018	Financial Aid
Buildings	IGSPS098	Organizational Structure
Calendar Relationships	IGSCA004	Calendar
Calendar Statuses	IGSCA001	Calendar
Calendar Types	IGSCA002	Calendar
Career Program/Unit Relationship	IGSPS123	Records: Academic Statistics
Catalog Definition	IGSPS096	Program Structure and Planning
Catalog Notes	IGSPS097	Program Structure and Planning
Class Rank Cohorts	IGSPR024	Records: Academic Statistics
Class Standing	IGSPR015	Records: Academic Statistics
Class Standing Schedule	IGSPR016	Records: Academic Statistics
Commonline Loan Setup	IGFSL004	Financial Aid
Condition Builder	IGSUC011	UCAS
Configure Enrollment Credit Points	IGSEN075	Enrollments

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Contribution Payment Options	IGSEN007	Enrollments
Correspondence Categories	IGSCO002	Correspondence
Correspondence Types	IGSCO001	Correspondence
Cost of Attendance Assignment	IGFAW005	Financial Aid
Cost of Attendance Items	IGFAW002	Financial Aid
Credential Ratings	IGSAD058	Admissions
Credential Types	IGSGR004	Records: Graduation
Credential Types Setup	IGSAD066	Admissions
Credit Type	IGSFI050	Student Finance
Curriculum Units	IGSPS104	Program Structure and Planning
Dale Alias Instance Offset Constraints	IGSCA010	Calendar
Date Alias Categories	IGSCA005	Calendar
Date Alias Instance	IGSCA008	Calendar
Date Alias Offset Constraints	IGSCA007	Calendar
Date Aliases	IGSCA006	Calendar
Date Aliases Instances	IGSCA009	Calendar
Define Extract Criteria	IGSHE007	HESA
Define To Do List	IGFAP027	Financial Aid
Definition of System Details	IGSUC032	UCAS
Degree Audit Lookups	FNDLVMLU2	N/A
Degree Audit/Transfer Request Configuration	IGSDA001	N/A
Degree Codes	IGSPS093	Program Structure and Planning
Delivery Method Types	IGSAS066	Records: Order Documents

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Dictionary of Occupational Titles	IGSPS070	Program Structure and Planning
Direct Loan	IGFSL003	Financial Aid
Disciplines	IGSPS040	Program Structure and Planning
Discontinuation Deadline Date Offset Constraints	IGSEN056	Enrollments
Discontinuation Reason Codes	IGSEN017	Enrollments
Document Requirement Processing Steps	IGSAS067	Records: Order Documents
Element Ranges - Fee Category level	IGSFI020	Student Finance
Element Ranges - Fee Type level	IGSFI020	Student Finance
Enrollment Calendar Configurations	IGSEN016	Enrollments
Enrollment Categories	IGSEN009	Program Structure and Planning
Enrollment Category Procedure Detail	IGSEN010	Enrollments
Enrollment Category Validation Setup	IGSEN058	Enrollments
Enrollment Deadline Offset Constraints	IGSEN055	Enrollments
Enrollment Deadlines	IGSPS101	Enrollments
Enrollment Method Types	IGSEN015	Enrollments
Enrollment Note Types	IGSEN021	Enrollments
Examination Material Types	IGSAS003	Records: Assessments
Examination Sessions	IGSAS021	Records: Assessments
Examination Supervisor Details	IGSAS020	Records: Assessments

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Examination Supervisor Types	IGSAS002	Records: Assessments
Notes	IGSGE006	N/A
Expected Workload	IGSPS126	Program Structure and Planning
Expected Workload Override Reason	IGSPS128	Program Structure and Planning
Export Applications to OSS	IGSUC007	UCAS
External Term Mapping	IGFAW020	Financial Aid
Faculty Tasks	IGSPS127	Program Structure and Planning
Federal Stafford Loan Limits	IGFAW021	Financial Aid
Fee Assessment Rates - Fee Category Calendar Instance level	IGSFI021	Student Finance
Fee Assessment Rates - Fee Type level	IGSFI021	Student Finance
Fee Categories	IGSFI019	Student Finance
Fee Category Calendar Instance: Fee Trigger Group	IGSFI017	Student Finance
Fee Category Calendar Instance: Program Fee Trigger	IGSFI015	Student Finance
Fee Category Calendar Instance: Program Fee Trigger	IGSFI015	Student Finance
Fee Category Calendar Instance: Program Group Fee Trigger	IGSFI014	Student Finance
Fee Category Calendar Instance: Program Type Fee Trigger	IGSFI013	Student Finance
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance
Fee Category Calendar Instance: Unit Set Fee Trigger	IGSFI018	Student Finance
Fee Category Calendar Instance: Unit Set Fee Trigger	IGSFI018	Student Finance
Fee Posting Accounts	IGSFI004	Student Finance
Fee Structure Statuses	IGSFI001	Student Finance
Fee Type - Ancillary	IGSFI012	Student Finance
Fee Type - External	IGSFI012	Student Finance
Fee Type - Other	IGSFI012	Student Finance
Fee Type - Sponsor/Late/Fin/Refund /Document	IGSFI012	Student Finance
Fee Type - Tuition	IGSFI012	Student Finance
Fee Types: Accounts	IGSFI064	Student Finance
Fee Types: Ancillary Rates	IGSFI040	Student Finance
Fee Types: Ancillary Segments	IGSFI039	Student Finance
Fields of Study	IGSPS004	Program Structure and Planning
Finance and Late Charge Plan	IGSFI067	Student Finance
Financial Aid Attendance Type Mapping	IGFAP032	Financial Aid
Financial Aid Career Level Mapping	IGFAW037	Financial Aid
Financial Aid Class Standing Mapping	IGFAP033	Financial Aid

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Financial Aid Office	IGFAP017	Financial Aid
FISAP Income Levels	IGFAW033	Financial Aid
Form Configuration	IGSPE050	Person
FTE Calendars	IGSHE015	HESA
Fund Calendar Relations	IGFAW018	Financial Aid
Fund Code	IGFAW009	Financial Aid
Fund Manager	IGFAW010	Financial Aid
Fund Pays Only Fee Classes	IGFAW042	Financial Aid
Fund Pays Only Programs	IGFAW040	Financial Aid
Fund Pays Only Units	IGFAW041	Financial Aid
Fund Rollover	IGFAW019	Financial Aid
Fund Term Installments	IGFAW026	Financial Aid
Fund To Do Items	IGFAW043	Financial Aid
Fund Types	IGFAW008	Financial Aid
Funding Sources	IGSPS010	Program Structure and Planning
Generic Tax Setup	IGFAP041	Financial Aid
Government Admission Codes	IGSAD004	Admissions
Government Attendance Types	IGSST010	Program Structure and Planning
Government Basis for Admission Types	IGSST009	Admissions
Government Contribution Payments	IGSEN006	Enrollments
Government Discipline Groups	IGSST007	Program Structure and Planning
Government Field of Study	IGSST003	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Government Funding Sources	IGSST006	Program Structure and Planning
Government Honor Levels	IGSST013	Records: Graduation
Government Levels of Completion	IGSAD020	Admissions
Government Levels of Qualification	IGSAD019	Admissions
Government Program Attendance Modes	IGSST011	Program Structure and Planning
Government Program Types	IGSST001	Program Structure and Planning
Government Secondary Assessment Types	IGSAD023	Admissions
Government Snapshot Control	IGSST018	Enrollments
Government Socio-Economic Objective Classifications	IGSRE008	Research
Government Special Program Types	IGSST002	Program Structure and Planning
Government Type of Activity Classification Codes	IGSRE010	Research
Grade Conversion	IGSAD068	Admissions
Grading Schema Grade Translations	IGSAS026	Records: Assessments
Grading Schemas	IGSAS025	Records: Assessments
Graduand Approval Statuses	IGSGR002	Records: Graduation
Graduand Statuses	IGSGR001	Records: Graduation
Graduation Ceremony	IGSGR007	Records: Graduation
Graduation Ceremony Notes	IGSGR010	Records: Graduation

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Graduation Note Types	IGSGR003	Records: Graduation
Guarantor Codes	IGFSL002	Financial Aid
HESA Codes	IGSHE001	Enrollments
HESA Data Set =	IGSHE001	Program Structure and Planning
HESA Data Set =	IGSHE001	Admissions
Holds Plans	IGSFI068	Student Finance
Honor Levels	IGSGR005	Records: Graduation
IGS System Profile Values	FNDPOMPV1	N/A
Import Parameters	IGFAP002	Financial Aid
Income Protection Setup	IGFAP043	Financial Aid
Incomplete Grade Conversion System Profile Setup	IGSAS034	Records: Assessments
Inquirer Information	IGSAD058	Admissions
Inquiry Characteristic Types	IGSAD028	Inquiry
Inquiry Information Types	IGSAD027	Inquiry
Inquiry Package Items	IGSAD030	Inquiry
Inquiry Source Types	IGSAD026	Inquiry
Inquiry Status	IGSAD029	Inquiry
Institution Statistic Type Configuration	IGSPR019	Records: Academic Statistics
Institution Waitlist Options	IGSEN045	Enrollments
Institutional Application	IGFAP010	Financial Aid
Institutions	IGSOR029	Organizational Structure
Interests	IGSAD058	Admissions
Intermission Types	IGSEN068	Enrollments

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
International Currency Codes	IGSFI002	Student Finance
Lender Codes	IGFSL001	Financial Aid
Lender Relations	IGFSL011	Financial Aid
Load Calendar Structure	IGSEN013	Enrollments
Load Calendar Structure	IGSEN019	Enrollments
Location	IGSOR031	Organizational Structure
Location Accounts	IGSFI063	Student Finance
Lockboxes	ARXLOBOX	N/A
Lookup Values	FNDLVMLU	N/A
Low Tuition and Fees Codes	IGFGR009	Financial Aid
Maintain Code Associations	IGSHE002	HESA
Maintain Code Mappings	IGSHE003	HESA
Maintain Codes	IGSHE001	HESA
Maintain Group Rules	IGSRU002	Rules
Maintain Job Text	IGSGE008	N/A
Maintain Rule	IGSRU001	Rules
Maintain System Messages	IGSGE003	N/A
Mapping Attributes	IGSCO014	Correspondence
Mark/Grade Entry Configuration	IGSAS005	Records: Assessments
Match Criteria Sets	IGSPE022	Person
Matching Criteria	IGFAP023	Financial Aid
Measurements	IGSGR006	Records: Graduation
Media and Equipment	IGSPS080	Program Structure and Planning
Meet with Classes	IGSPS110	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Meet with Exams Group	IGSPS111	Program Structure and Planning
Milestone Statuses	IGSRE011	Research
Milestone Types	IGSRE001	Research
Multiplication Factor Setup	IGFAP044	Financial Aid
National Student Clearinghouse Configuration	IGSEN074	Enrollments
Need Analysis Methodology Types	IGFAP039	Financial Aid
Nominated Completion Period	IGSEN073	Enrollments
Non-Standard Unit Section Discontinuation Deadline Calculation	IGSEN054	Enrollments
Non-Standard Unit Section Enrollment Deadline Setup	IGSEN053	Enrollments
Occupational Titles and Related Programs	IGSPS072	Program Structure and Planning
Online Help Control Details	IGSHE001	HESA
Online Help URL Details	IGSHE002	HESA
Open/Close Accounting Periods	IGSFI071	Student Finance
Oracle Student System Lookups	FNDLVMLU	N/A
Organization Accounts	IGSFI062	Student Finance
Organization Structure Data Setup - Repeat Processing	IGSOR032	Enrollments
Organization Structure Data Setup, Function Filter TAB	IGSOR032	Organizational Structure

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Organization Structure Data Setup, Institution Type TAB & Institution Status TAB	IGSOR032	Organizational Structure
Organization Structure Data Setup, Location Type TAB	IGSOR032	Organizational Structure
Organization Structure Data Setup, Note Type TAB & Alternate ID Type TAB	IGSOR032	Organizational Structure
Organization Structure Data Setup, Organizational Status TAB	IGSOR032	Organizational Structure
Organization Unit Reserved Seating	IGSPS105	Enrollments
Organization Unit Statistic Type Configuration	IGSPR020	Records: Academic Statistics
Organizational Structure Setup	IGSOR028	Organizational Structure
Organizational Unit Progression Configuration	IGSPR004	Progression
Organizational Unit Relationships	IGSOR015	Organizational Structure
Organizational Unit Student Targets	IGSAD041	Admissions
Organizational Unit Waitlist Setup	IGSEN046	Enrollments
Organizational Units	IGSOR030	Organizational Structure
OSS Data Change Workflow Attribute	IGFAP031	Financial Aid
OSS Users (for setup purposes)	FNDSCAUS	N/A
Other OLE Notes	IGSGE007	N/A

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Overseas Secondary Education Qualification	IGSAD024	Admissions
Packaging Parameters	IGFAW014	Financial Aid
Patterns of Study	IGSPS034	Program Structure and Planning
Payables Lookups	FNDLVMLU	N/A
Pell Alternate Schedule Setup	IGFGR008	Financial Aid
Pell Matrix	IGFGR006	Financial Aid
Pell Setup	IGFGR003	Financial Aid
Person Data Setup	IGSPE052	Person
Person Details	IGSPE034	Person
Person Hold Types	IGSEN042	Person
Person ID Group Definitions	IGSPE001	Person
Person ID Group Enrollment Setup	IGSEN077	Enrollments
Personal Statement Types	IGSAD086	Admissions
Primary Program Setup	IGSPS122	Program Structure and Planning
Probability Details	IGSAD058	Admissions
Program & Unit Note Types	IGSPS069	Program Structure and Planning
Program Accounts	IGSFI059	Student Finance
Program Alternative Exits	IGSPS016	Program Structure and Planning
Program Annual Load	IGSPS025	Program Structure and Planning
Program Attendance Modes	IGSPS005	Program Structure and Planning
Program Awards	IGSPS017	Program Structure and Planning
Program Categories	IGSPS003	Program Structure and Planning
Program Categorizations	IGSPS019	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Program Default Research Milestones	IGSRE014	Research
Program Entry Point Reference Codes	IGSPS033	Program Structure and Planning
Program Fields of Study	IGSPS018	Program Structure and Planning
Program Group Membership	IGSPS015	Program Structure and Planning
Program Group Types	IGSPS007	Program Structure and Planning
Program Groups	IGSPS012	Program Structure and Planning
Program Occupational Titles	IGSPS071	Program Structure and Planning
Program Offering Notes	IGSPS031	Program Structure and Planning
Program Offering Option	IGSPS032	Program Structure and Planning
Program Offering Option Admission Categories	IGSPS030	Program Structure and Planning
Program Offering Option Notes	IGSPS036	Program Structure and Planning
Program Offering Option Unit Sets	IGSPS022	Program Structure and Planning
Program Offering Pattern Notes	IGSPS038	Program Structure and Planning
Program Offering Patterns	IGSPS037	Program Structure and Planning
Program Offering Unit Set Relationships	IGSPS021	Program Structure and Planning
Program Offering Unit Sets	IGSPS020	Program Structure and Planning
Program Offerings	IGSPS029	Program Structure and Planning
Program Ownership	IGSPS014	Program Structure and Planning
Program Pattern of Studies	IGSPS035	Program Structure and Planning
Program Reference Codes	IGSPS023	Program Structure and Planning
Program Stage Types	IGSPS028	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Program Stages	IGSPS026	Program Structure and Planning
Program Statuses	IGSPS009	Program Structure and Planning
Program Student Targets	IGSAD042	Admissions
Program Type Groups	IGSPS002	Program Structure and Planning
Program Types	IGSPS001	Program Structure and Planning
Program Unit Levels	IGSPS050	Program Structure and Planning
Program Version Notes	IGSPS027	Program Structure and Planning
Program Version Progression Configuration	IGSPR003	Progression
Program Version Rules	IGSPS039	Program Structure and Planning
Programs Eligible for Financial Aid	IGSPS073	Program Structure and Planning
Progression Rule Application	IGSPR007	Progression
Progression Rule Category	IGSPR001	Progression
Progression Rule Outcome	IGSPR009	Progression
Progression Rule Outcome Type	IGSPR008	Progression
Progression Rule Summary	IGSPR014	Progression
Progression Rules	IGSPR006	Progression
Rating Scales	IGSAD059	Admissions
Receipt Classes	ARXSUDRC	N/A
Receipt Sources	ARXSUMSC	N/A
Receivable Lookups	FNDLVMLU3	N/A
Recruitment Information	IGSAD058	Admissions
Reference Code Types	IGSPS011	Program Structure and Planning
Refund Tolerance Limits	IGSFI065	Student Finance
Relationships	IGSOR012	Organizational Structure

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Remit-to-Addresses	ARXSURMT	N/A
Research Calendar Configuration	IGSRE012	Research
Research Supervisor Types	IGSRE002	Research
Restricted Funding Sources	IGSPS024	Program Structure and Planning
Retention Schedules - Fee Category Calendar Instance level	IGSFI024	Student Finance
Retention Schedules - Fee Category Fee Liability level	IGSFI024	Student Finance
Retention Schedules - Fee Type Calendar level	IGSFI024	Student Finance
Rollover Calendar Instance	IGSCA003	Calendar
Rooms	IGSPS099	Organizational Structure
Scholarship Type	IGSRE006	Research
School applying To	IGSAD082	Admissions
Secondary Education Assessment Types	IGSAD021	Admissions
Secondary Education Schools	IGSAD014	Admissions
Self Service Application Types	IGSAD085	Admissions
Self Service Application Types	IGSAD085	Admissions
Self Service Application Types	IGSAD085	Admissions
Self Service Enrollment Setup	IGSEN063	Enrollments
Self Service User Activity Setup	IGSEN057	Enrollments
Servicer Codes	IGFSL010	Financial Aid

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Setup Inquiry Entry Levels	IGSAD077	Inquiry
Setup Inquiry Entry Status	IGSAD075	Inquiry
Setup Inquiry Program Details	IGSAD074	Inquiry
Setup Inquiry Unit Set Details	IGSAD076	Inquiry
Setup Self Service Inquiry Configuration	IGSAD078	Inquiry
Socio-Economic Objective Classifications	IGSRE009	Research
Source Categories	IGSAD055	Admissions
Source Types	IGSPE021	Person
Special Consideration Category	IGSAS006	Records: Assessments
Special Consideration Outcome	IGSAS007	Records: Assessments
Special Requirements	IGSPS062	Program Structure and Planning
Sponsor Setup	IGFSSP001	Financial Aid
State & Other Tax Allowance	IGFAP040	Financial Aid
State Codes	IGSPE010	Person
Student External and Internal Job Setup	IGFSE001	Financial Aid
Student Statistics Types	IGSPR018	Records: Academic Statistics
Student Target Types	IGSAD039	Admissions
Submission Student Targets	IGSAD040	Admissions
Submissions	IGSHE006	HESA
Sub-Unit Relationships	IGSPS051	Program Structure and Planning
Supervisors To Venue	IGSAS022	Records: Assessments

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
System Advanced Standing Types	IGSAV002	Records: Advanced Standing
System Hold Effect Type	IGSEN041	Person
System Options (header only)	IGSFI037	Student Finance
System Options; Receivables Default TAB, Refunds TAB, Calendar Configurations TAB, GL Accounts TAB, Revenue Segments TAB, Lockbox TAB	IGSFI037	Student Finance
System Profile Value	FNDPOMPV	N/A
System Progression Configuration	IGSPR002	Progression
Teaching Period Codes	IGSAD017	Calendar
Teaching Responsibility	IGSPS048	Program Structure and Planning
Teaching Responsibility Override	IGSPS059	Program Structure and Planning
Tertiary Education Level of Completion	IGSAD016	Admissions
Tertiary Level of Qualification	IGSAD015	Admissions
Test Result Information	IGSAD058	Admissions
Text Notes	IGSGE004	N/A
Thesis Exam Types	IGSRE004	Research
Thesis Panel Member Types	IGSRE005	Research
Thesis Panel Types	IGSRE003	Research
Thesis Result Codes	IGSRE007	Research
Timeslot Calendar Configuration	IGSEN052	Enrollments

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Timeslot Setup	IGSEN048	Enrollments
Tracking Group Membership	IGSTR009	Tracking
Tracking Groups	IGSTR005	Tracking
Tracking Note Types	IGSTR004	Tracking
Tracking Status	IGSTR003	Tracking
Tracking Step Catalog	IGSTR011	Tracking
Tracking Type Step Notes	IGSTR002	Tracking
Tracking Types	IGSTR001	Tracking
Transaction Sources	RAXSUMSC	N/A
Transaction Types	RAXSUCTT	N/A
Transcript Information	IGSAD058	Admissions
Transcript Type	IGSAS032	Records: Assessments
UCAS Code Mappings	IGSUC034	UCAS
UCAS Setup	IGSUC001	UCAS
UK Statistics - Program TAB	IGSHE014	Program Structure and Planning
UK Statistics - Unit TAB	IGSHE014	Program Structure and Planning
Unit Accounts	IGSFI060	Student Finance
Unit Assessment Items	IGSAS011	Records: Assessments
Unit Assessment Patterns	IGSAS013	Records: Assessments
Unit Categories	IGSPS041	Program Structure and Planning
Unit Categorizations	IGSPS052	Program Structure and Planning
Unit Classes	IGSPS045	Program Structure and Planning
Unit Credit Points & Hours - Claimable Hours only	IGSPS047	Records: Assessments
Unit Cross-Listing Group	IGSPS112	Program Structure and Planning
Unit Disciplines	IGSPS049	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Unit Discontinuation Date Criteria	IGSEN008	Enrollments
Unit Fields of Study	IGSPS074	Program Structure and Planning
Unit Grading Schemas	IGSPS077	Program Structure and Planning
Unit Internal Program Levels	IGSPS046	Program Structure and Planning
Unit Levels	IGSPS043	Program Structure and Planning
Unit Location and Facilities	IGSPS081	Program Structure and Planning
Unit Modes	IGSPS044	Program Structure and Planning
Unit Offering Notes	IGSPS056	Program Structure and Planning
Unit Offering Pattern Notes	IGSPS057	Program Structure and Planning
Unit Offering Pattern Reserve Seating	IGSPS106	Enrollments
Unit Offering Pattern Waitlist	IGSPS075	Enrollments
Unit Offerings	IGSPS055	Program Structure and Planning
Unit Placement	IGSAD060	Admissions
Unit Process Order Configuration	IGSDA002	
Unit Program Type Level	IGSPS108	Program Structure and Planning
Unit Reference Codes	IGSPS053	Program Structure and Planning
Unit Repeat Conditions	IGSPS078	Enrollments
Unit Repeat Families	IGSPS107	Enrollments
Unit Section Accounts	IGSFI061	Student Finance
Unit Section Assessment Items	IGSPS092	Records: Assessments
Unit Section Assessments	IGSPS090	Records: Assessments
Unit Section Categorizations	IGSPS103	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Unit Section Credit Points	IGSPS086	Program Structure and Planning
Unit Section Credit Points - Claimable Hours only	IGSPS086	Records: Assessments
Unit Section Cross-Listed Group	IGSPS113	Program Structure and Planning
Unit Section Details	IGSPS083	Program Structure and Planning
Unit Section Enrollment Limits & Waitlists, Enrollment Waitlist TAB	IGSPS085	Enrollments
Unit Section Enrollment Limits & Waitlists, Reserved Seating TAB	IGSPS085	Enrollments
Unit Section Financial Aid Eligibility	IGSPS088	Program Structure and Planning
Unit Section Grading Schemas	IGSPS082	Program Structure and Planning
Unit Section Notes	IGSPS060	Program Structure and Planning
Unit Section Occurrences	IGSPS084	Program Structure and Planning
Unit Section Occurrences Facilities	IGSPS114	Program Structure and Planning
Unit Section Reference Codes	IGSPS091	Program Structure and Planning
Unit Section Repeat Conditions -Repeat Conditions	IGSPS089	Enrollments
Unit Section Teaching Responsibilities	IGSPS116	Program Structure and Planning
Unit Section Version Rules	IGSPS102	Program Structure and Planning
Unit Sections	IGSPS058	Program Structure and Planning
Unit Sections - Anonymous Grading Check box only	IGSPS058	Records: Assessments
Unit Set Categories	IGSPS063	Program Structure and Planning

Table D–1 Window Reference Table

Window Name	Window Reference Number	Subsystem
Unit Set Ceremony	IGSGR009	Records: Graduation
Unit Set Notes	IGSPS067	Program Structure and Planning
Unit Set Pre-Enrollment Configuration	IGSPS124	Enrollments
Unit Set Rules	IGSPS068	Program Structure and Planning
Unit Set Statuses	IGSPS064	Program Structure and Planning
Unit Statuses	IGSPS042	Program Structure and Planning
Unit Subtitle	IGSPS109	Program Structure and Planning
Unit Version Notes	IGSPS054	Program Structure and Planning
Unit Version Rules	IGSPS061	Program Structure and Planning
Unscheduled Contact List	IGSPS118	Program Structure and Planning
User Defined Return Class	IGSHE005	HESA
Venue Addresses	IGSAS018	Organizational Structure
Venue Availability	IGSAS019	Records: Assessments
Venues	IGSAS017	Organizational Structure

Implementation Concurrent Processes

The following topics are described in this appendix:

- Implementation Concurrent Processes
- Calendar Concurrent Processes
- Organization Structure Concurrent Processes
- Program Structure and Planning Concurrent Processes
- Financial Aid Concurrent Processes
- Admissions Rollover Processes
- Person Concurrent Processes
- Records Concurrent Process Configuration

E.1 Implementation Concurrent Processes

E.1.1 Entering Concurrent Process Text

Prerequisites

Oracle Student System must be set up.

Responsibility

Oracle Student System Super User

Navigation

Requests > Job Text window

Steps

1. In the Job Name field, query the concurrent process for which text is to be entered.
2. Enter data in appropriate fields.
3. Save or save and continue as follows:
File > Save or Save and Proceed
4. Close the window.

Guidelines

Text to be inserted in a concurrent process must match the format and content of the report.

Various text records can be created for a single concurrent process.

Parameters in the same concurrent process can be used to insert different text records in the same report.

The list of values for a text parameter displays all text records available to the concurrent process, regardless of whether they apply to the particular parameter.

E.1.2 Running Concurrent Processes

The calendar concurrent processes produce calendar reports and the organizational structure concurrent processes produce reports related to your organizational structure. These reports display details about organizational units that are set up in Oracle Student System.

For some concurrent processes, text can be specified for insertion in the report output. The Job Text window is used to enter text to include in the report output. A text record is assigned a description that appears in a list of values in the concurrent process's parameter window. When a text record is selected as a parameter, the text appears in the report when the concurrent process is run.

Prerequisites

Oracle Student System must be set up.

Responsibility

Oracle Student System Super User

Navigation

Requests > Concurrent Manager > Requests > Run

The Submit a New Request window appears.

Steps

5. Select the Single Request radio button.

6. Click **OK**.

The Submit Request window appears.

7. In the Name field, select the concurrent process from the list of values.

8. Click **OK**.

The Parameters window appears.

9. Enter data in appropriate fields.

For information on parameters, see the tables in this chapter.

10. To apply the parameters, click **OK**.

11. To send the request to the concurrent manager, click **Submit**.

The Requests window appears.

12. To view the log file, select the appropriate Request ID and click **View Log**.

13. If there are any errors, make corrections and run the concurrent process again.

14. Close the window.

E.2 Calendar Concurrent Processes

Calendar Date Report Concurrent Process

The Calendar Date Report concurrent process lists important University dates for a selected combination of parameters.

The following table lists parameters for the Calendar Date Report concurrent process.

Table E-1 *Calendar Date Report Concurrent Process Parameters*

Parameter	Description
Runtime Comment	comment that appears on header page of report
Date Alias Category	institution-defined classification of date aliases according to common attributes for inquiry or reporting purposes

Table E–1 Calendar Date Report Concurrent Process Parameters

Parameter	Description
Calendar Type	institution-defined name given to all calendars of similar classification
Calendar Status	institution-defined status indicating calendar’s level of activity
Range Start Date	range start date; mandatory
Range End Date	range end date; mandatory
Include Sub Calendar Type	include sub calendar type

Rollover Calendar Report Concurrent Process

The Rollover Calendar Report concurrent process details new calendar instances, their relationships, and the new date alias instance created from the Rollover Calendar Instance window. This concurrent process records exceptions for those values for which rollover could not be completed successfully.

The following table lists parameters for the Rollover Calendar Report concurrent process.

Table E–2 Rollover Calendar Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	comment that appears on header page of report
Creation Date	creation date of rollover process executed; mandatory
Sort By	sort by
Sort Order	sort order

Monthly Calendar Report Concurrent Process

The Monthly Calendar Report concurrent process displays date alias instance details in each day block in a traditional wall calendar format for the selected month and year.

The following table lists parameters for the Monthly Calendar Report concurrent process.

Table E–3 Monthly Calendar Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	comment that appears on header page of report
Month	month; mandatory
Year	year; mandatory
Format	page format

E.3 Organization Structure Concurrent Processes

Organizational Unit Details Report Concurrent Process

The Organizational Unit Details Report concurrent process lists all organizational unit details except relationships for a selected combination of parameters.

The following table describes the Organizational Unit Details Report concurrent process parameters.

Table E–4 Organizational Unit Details Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	comment that appears on header page of report
Member Type	institution-defined classification of organizational units by structure level
Organizational Type	organizational unit classification
Organizational Status	organizational unit activity
Organizational Unit Code	institution-defined code for organizational unit
Sort1	1st sort attribute
Sort Order1	sort order1st by ascending or descending
Sort2	2nd sort attribute
SortOrder2	sort order 2nd by ascending or descending

Parent-Child Organizational Unit Report Concurrent Process

The Parent-Child Organizational Unit Report concurrent process details relationships between organizational units for selected organizational units. There is a maximum of fifteen levels.

The following table describes the Parent-Child Organizational Unit Report concurrent process parameters.

Table E-5 Parent-Child Organizational Unit Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	comment that appears on header page of report
Organizational Unit Code	institution-defined code for organizational unit

Delete System Log Entries Concurrent Process

The following table describes parameters for the Delete System Log Entries concurrent process.

Table E-6 Delete System Log Entries Concurrent Process Parameters

Parameter	Description
System Log Type	system log type to be deleted; system log type is abbreviated name for concurrent process that produced entry; separate instance of this concurrent process must be requested to delete entries of each log type, allowing each system log type's entries to be deleted at different ages
Days Old	number of days old; system log entries are deleted if older than this number

The Delete System Log Entries concurrent process is scheduled to run automatically at regular intervals as often as necessary. This concurrent process is typically run at night or during other off-peak times.

Import Institutions Crosswalk Concurrent Process

The Import Institutions Crosswalk concurrent process takes records with the status Pending from interface crosswalk and imports into the OSS crosswalk. The crosswalk translates different institution identifiers coming from different sources to each other and to a common identifier. If any error occurs during import, then the

corresponding record is marked as an Error and the process proceeds to the next record.

When import process is run, each record is marked indicating if the record is imported. Records are marked as Successful or Error. All records are maintained in the interface until they are removed by the user. Users can correct the error and change the status of the record to Pending and run the process again. If the import process is run again, it ignores all the records that were marked as Successful or Error, so that only new or corrected records are imported. The records that have already been imported is not imported again.

The external sources have their own system for identifying the subject institutions. Different institutions have different codes and that Student System is able to match and update data using the crosswalk. To enable OSS to correctly match and update data about an institution coming from different sources, there must be an intervening crosswalk. A common identifier is generated automatically during the import of the data from the Crosswalk interface to the OSS Crosswalk. It is used solely for linking institutions in the Crosswalk and is not involved in any subsequent import process.

There are no parameters for the Import Institutions Crosswalk concurrent process.

Import Institutions Crosswalk Error Report Concurrent Process

The Import Institutions Crosswalk Error Report concurrent process displays error records during the import from Interface Crosswalk to OSS Crosswalk.

Only error records during the import from interface to crosswalk must be displayed. The records with error status 3 are displayed. Users can run the report after running the Import Institutions Crosswalk concurrent process.

There are no parameters for the Import Institutions Crosswalk Error Report concurrent process.

Import Institution Concurrent Process

The Import Institution concurrent process enables users to import useful information about institutions. It also enables users to import details such as addresses, contacts, and notes. Users have the option to import only the data that they want to use such as importing from single or multiple external sources. At the time of each import, the system ignores that fact that only some part of all the possible data is being imported. Users are responsible for supplying data to import institution data interface in the format required by Student System.

A mandatory parameter for the import process is data source and it identifies all the records in the import batch as belonging to the same data set and therefore

creating the same alternate ID type. When users enter a value in the Match Data Source parameter, the concurrent process checks if the alternate data source and the alternate data source ID are present in the Crosswalk table. If the record exists in the Student System table, the Import Institution concurrent process updates the record and if it does not exist, the concurrent process creates a new record.

Optionally, if users enter a value in the Numeric Match parameter, the Import Institution concurrent process maps the data source value and the alternate data source value in the Student System table.

The following table describes the Import Institution concurrent process parameters.

Table E-7 Import Institution Concurrent Process Parameters

Parameter	Description
P_DATE	date; defaults to system date
Batch Identifier	unique batch ID
Data Source	data source
Match Data Source	system matching data source
Numeric Match	Y and N; performs a numeric match between data source and match data source
Address Usage	usage of the institution address
Person Type	contact person

Import Process Institution Error Report Concurrent Process

The Import Process Institution Error Report concurrent process displays error records during the import of institutions from Interface Institution table to Student System table.

Only error records during the import from interface to Student System must be displayed. The records with error status 3 are displayed. Users can run the report after running the Import Institutions concurrent process.

The following table describes the Import Process Institution Error Report concurrent process parameters.

Table E-8 Import Process Institution Error Report Concurrent Process Parameters

Parameter	Description
Batch Description	batch description

E.4 Program Structure and Planning Concurrent Processes

Catalog Rollover Concurrent Process

Run the Catalog Rollover concurrent process to define and schedule the rollover of catalog definitions and notes from a previous academic calendar.

The following table describes the Catalog Rollover concurrent process parameters.

Table E–9 Catalog Rollover Concurrent Process Parameters

Parameter	Description
Existing Catalog Version	Existing catalog version
New Catalog Version	New catalog version
Override Flag	If selected, overrides the existing catalog settings
Debug Flag	If selected, creates an error log file

Rollover Faculty's Assignment Concurrent Process

Run the Rollover Faculty's Assignment concurrent process to enable rollover of faculty assignments from one calendar type to another. The calendar category for the source and destination calendar types must be the same. The number of times the task can be rolled over depends on the rollover period defined in Assign/Override Faculty's Workload window. The process is run for specified person number or for all applicable person numbers.

The following table describes the Rollover Faculty's Assignment parameters.

Table E–10 Rollover Faculty's Assignment Concurrent Process Parameters

Parameter	Description
Person Number	Instructor's identification number
Source Calendar Type	Calendar type from which workload originates
Destination Calendar Type	Calendar type to which workload is applied

Rollover Program Offering Pattern Concurrent Process

Run the Rollover Program Offering Pattern concurrent process to create program offering patterns for an institution or a specified organizational unit in a new calendar instance if the destination calendar exists and is active, and the source

calendar type and the destination calendar type are Academic. Only active calendars of the Academic calendar type appear in the list of values.

The following table describes the Rollover Program Offering Pattern concurrent process parameters.

Table E-11 Rollover Program Offering Pattern Concurrent Process Parameters

Parameter	Description
Source Calendar	Source calendar to be rolled over
Destination Calendar	Destination calendar to receive rolled over data
Organizational Unit	Organizational unit that offers program

If program offering patterns are already rolled over to the same destination calendar in the Program Offerings window, they are not overwritten.

The Rollover Program Offering Pattern concurrent process is run in batch mode by a Program Structure and Planning specialist as needed while setting curriculum offerings for a new academic year. A new offering pattern must be created in the Basic Program Details window.

Rollover Unit Offering Pattern and Unit Section Concurrent Process

Run the Rollover Unit Offering Pattern and Unit Section concurrent process to create unit offering patterns, unit sections, assessment items, and waitlist attributes in a new calendar instance for one or more organizational units if the destination calendar exists and is active, and the source calendar type and the destination calendar type are Teaching.

The following table describes the Rollover Unit Offering Pattern and Unit Section concurrent process parameters.

Table E-12 Rollover Unit Offering Pattern and Unit Section Concurrent Process Parameters

Parameter	Description
Source Calendar	Source calendar to be rolled over
Destination Calendar	Destination calendar to receive rolled over data
Organizational Unit	Organizational unit that offers the program

If unit sections and unit offering patterns are already rolled over to the same destination calendar in the Unit Offerings window, they are not overwritten, but merge with the patterns and options created by this concurrent process. The data that is rolled over into a new unit offering pattern is listed in the Program Unit Rollover Processes report.

The Rollover Unit Offering Pattern and Unit Section concurrent process is run in batch mode by a Program Structure and Planning specialist as needed while setting curriculum for a new teaching period. A new version of a unit must be created in the Basic Unit Details window.

Schedule Rollover Concurrent Process

Run the Schedule Rollover concurrent process to define and schedule the rollover of schedule definitions and notes.

The following table describes the Schedule Rollover concurrent process parameters.

Table E-13 Schedule Rollover Concurrent Process Parameters

Parameter	Description
Existing Schedule Version	Existing schedule version
New Schedule Version	New schedule version
Override Flag	If selected, overrides the existing catalog settings
Debug Flag	If selected, creates an error log file

E.5 Financial Aid Concurrent Processes

Awards - Rollover Fund Attributes Concurrent Process

The Awards - Rollover Fund Attributes Concurrent Process rolls over funds from a current award year to a new award year. This process can be run either for the entire award year or for an individual fund. The properties and disbursement schedules of the new funds are based on the properties of the fund that is being rolled over.

The following table describes the Awards - Rollover Fund Attributes concurrent process parameters.

Table 5-1 Awards - Rollover Fund Attributes Concurrent Process Parameters

Parameter	Description
Award Year	award year when run for an award year

Table 5–1 Awards - Rollover Fund Attributes Concurrent Process Parameters

Parameter	Description
Fund ID	fund identifier

Sponsor Rollover Concurrent Process

This process carries forward sponsorship details to the following award year.

The following table describes the Awards - Rollover Sponsor Attributes concurrent process parameters.

Table E–14 Awards - Rollover Sponsor Attributes Concurrent Process Parameters

Parameter	Description
Award Year	award year
Person Number	person number
Person Group	person group
Fund Code	fund code
Term Calendar	term calendar

E.6 Admissions Rollover Processes

Rollover Admission Period Concurrent Process

The Rollover Admission Period concurrent process reproduces admission period details, including admission category, process type, and program offering option restrictions, in a future academic period by attaching them to an existing admission calendar rolled over as part of the Calendar Rollover process.

Users must run the Calendar Rollover concurrent process to create admission periods that can be rolled in this concurrent process. Users must also run the Program Structure Rollover concurrent process to roll over programs to future admission calendars. Once these concurrent processes are run, users can run the Rollover Admission Period concurrent process.

Note: Users must enter academic period which is a mandatory parameter. Only Planned or Active instances and admission periods without program offering restrictions can be rolled over.

The following table describes the Rollover Admission Period concurrent process parameters.

Table E–15 Rollover Admission Period Concurrent Process Parameters

Parameter	Description
Academic Period	academic period to which details for all active admission periods are rolled over
Admission Category	admission category to be rolled over Note: Admission period details must be rolled over for all categories. If one admission category is rolled over, and other admission categories are rolled over later, the first admission category appears as an exception in the log file.

The Rollover Admission Period concurrent process is run by an Admissions specialist as part of the annual rollover process.

This concurrent process produces a log file of exceptions encountered during the rollover process. The log file is viewed by running the Admission Calendar Rollover Report.

Admission Calendar Rollover Report Concurrent Process

The Admission Calendar Rollover Report lists all the admission categories rolled over from one admission calendar to a new admission calendar within the same academic period. It also displays exceptions in the Admission Calendar Rollover process with the reasons for no rollover of these admission categories.

The Admission Calendar Rollover Report also displays process types, locations, attendance modes and types.

The following table describes the Admission Calendar Rollover Report concurrent process parameters.

Table E–16 Admission Calendar Rollover Report Concurrent Process Parameters

Parameter	Description
Runtime Comment	comment that appears in report header
Log File Creation Date	defaults to most recent log file Note: Previous log files can be accessed from the list of values.

To generate the Admission Calendar Rollover Report the Admissions specialist must first run the Admission Calendar Rollover concurrent process in batch mode or online.

E.7 Person Concurrent Processes

Person User Name Batch Creation Concurrent Process

The Person User Name Batch Creation concurrent process to create user accounts in bulk. Institutions can have thousand of applications imported into their system. Each of these applicants may need to have a user account to gain access to view their application from the institution's web site.

This concurrent process validates if the person has an existing user account. If there is an existing user account, no account is created.

If the person does not have an existing user account, then a user account in FND_USER with generated user name, password, and person attributes in the customer field is created and an email is sent to the user about their newly created user account.

The following table describes the prerequisites for the Person User Name Batch Creation concurrent process.

Table E-17 *Person User Name Batch Creation Concurrent Process*

Parameter	Description
Person ID Group	values are people who are part of the person ID group

Prerequisites

You must have set the Generate User Name Automatically profile option as Yes. Otherwise, this concurrent process is not available.

Email address must exist for a person in order to create an account / user name.

Responsibility

Oracle Student System Super User

Navigation

Requests > Concurrent Manager > Requests > Run

The Submit a New Request window appears.

Steps

15. Select the Single Request radio button.

16. Click **OK**.

The Submit Request window appears.

17. In the Name field, select the concurrent process from the list of values.

18. Click **OK**.

The Parameters window appears.

19. Enter the person ID group from the list of values.

You are selecting the people in the person ID group.

20. To apply the parameter, click **OK**.

21. To send the request to the concurrent manager, click **Submit**.

The Requests window appears.

22. To view the log file, select the appropriate Request ID and click **View Log**.

23. If there are any errors, make corrections and run the concurrent process again.

Close the window.

See Also

See Appendix A, "Oracle Student System Profile Options" for information on the Generate User Name profile option.

E.8 Records Concurrent Process Configuration

E.8.1 Configuring Printing to Produce Transcripts

The transcript reports for the Product Transcripts - US Concurrent Process and the Product Transcripts - UK Concurrent Process print in bit map mode to support the exact format required.

Bit map reports require some configuration for printers before they can be printed properly.

You can configure the printer to print different styles. For example, on your printed transcript, you can configure the printer to print bold or underlined text.

Prerequisites

In the Solaris platform, the file `/etc/printers.conf` of the server on which the concurrent process is running should have the following entry for the printer:

```
<Printquename>:\n      :bsdaddr=<printquename>,print,Solaris:
```

You must open the file and check to ensure that an entry for the printer exists in the above mentioned format. If not, you must either create an entry or modify the entry in above mentioned format.

E.8.1.1 Creating a Driver

Every printer registered with Oracle Application needs to be associated with a printer type. Printer types are associated with a style and a driver.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Driver

Steps

1. Create a driver with arguments (In the lower block):

```
lp -d $PROFILE$.PRINTER PROFILE$.FILENAME
```

E.8.1.2 Creating a Style

Create a style to determine the orientation of the page. For the transcript reports, create a portrait orientation.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Style

Note: The Orientation for the transcript reports (IGSASP26 and IGSASP27) is Portrait. Create the style with an orientation of Portrait.

E.8.1.3 Creating a Type

Create a type to associate with the printer.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Type

Steps

Create a type.

and attach the driver you just created in Creating a Driver and the style you just created in Creating a Style to the type.

E.8.1.4 Attaching the Type to the Driver

You must attach the type you created in Creating a Type to the driver you created in Creating a Driver and the style you created in Creating a Style.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Register

Steps

1. Create a new printer or select your printer.
2. Attach the printer type created in Creating a Type to the printer.

E.8.1.5 Making changes in APPLSYS.env File

Make the following changes:

- DISPLAY= IP address of the concurrent manager server

And example of this is:

144.25.77.159:23.0

- export DISPLAY
- ORACLE_LOCALPREFERENCE=/home/applrt
- export ORACLE_LOCALPREFERENCE

E.8.1.6 Bounce the Concurrent Manager and Form Server

You must stop and restart the concurrent manager process and form server to make the latest changes effective. If you do not do this, the information is picked from cache.

Glossary

1040 form/1040a form/1040ez form

Federal income tax returns. Each person who received an income during the previous year must file a 1040 form with the IRS by April 15.

1090 form

Used by businesses to report income paid to a non-employee. Banks use this form to report interest income.

401(k)

Type of retirement fund. Money can be borrowed from a 401(k) to help pay for a child's education.

academic calendar

Twelve-month user-defined period representing a cycle of academic activities.

academic year

Period during which the school is in session, consisting of at least 30 weeks of instructional time. The school year typically runs from the beginning of September through the end of May at most colleges and universities.

accrual date

Date on which interest charges on an educational loan begin to accrue. See subsidized loan.

academic history

Record of prospect or applicant's secondary and post-secondary units and grades at a previous institution that is submitted to an institution.

academic index

Calculated for a student based on academic history, previous academic performance, and admission test scores.

academic interest

The subjects applicant is interested in and would like to major in.

account code

General ledger account code specific to a financial reporting period.

ACT

See *American College Testing Program*.

action date - tracking subsystem

Date calculated by the system, or entered by the user, when a tracking step should be completed. Initially it is calculated using the Tracking Item Start Date, Business Days Only indicator, and the number of action days for the tracking type step. For sequential steps, the completion date of the previous step is taken into account.

action date - unit assessment item

Inserted automatically when a change is made to a student unit assessment item, indicating that a change needs to be applied to related student unit attempts. Deleted after the change is automatically applied to student unit attempts.

action date - unit assessment pattern

Inserted automatically when a change is made to a student unit assessment pattern, indicating that a change needs to be applied to related student unit attempts. Deleted after the change is automatically applied.

action days

Maximum number of days to complete a tracking step for tracking items. Used with sequential and business-days only indicators to calculate the action date of the step.

achievement tests

Tests measuring a student's proficiency and accumulated knowledge of specific subject areas. Different schools require different achievement tests as part of their admissions requirements. Since March 1994, these tests are known as the SAT II tests. See educational testing service and scholastic assessment test.

adjusted available income

Remaining income in the federal methodology after tax and basic living allowances are subtracted.

address usage

The location or purpose for which the address has been defined, for example, BILL TO.

admit/deny

A practice admits marginal students, but does not award them any financial aid.

administrative indicator

Indicates whether the unit set is administrative or academic. Administrative unit sets typically do not appear on official documents such as transcripts.

administrative unit status

Institution-defined administrative statuses applicable to a discontinued student unit attempt, such as Withdrawn Early and Withdrawn Late - Fail. Used to determine load, progression, and grades.

admission application status

Describes the progress of an application within the admission process.

admission calendar

User-defined period, nine or twelve months representing a cycle of admission activities prior to the period in which the applicant would enroll.

admission category

Institution-defined categories used for sets of applicants whose applications are processed through a common set of admission steps.

admission code

Describes the matriculation category assigned to an applicant on the basis of current qualifications. These codes can be mapped to basis for admission types. See *basic details*.

admission conditional offer status

Indicates if the conditions attached to an offer of admission have been met.

American College Testing Program

One of two national standardized college entrance examinations used in the United States. Most universities require either the ACT or SAT as part of an admission application. See *scholastic assessment test*.

admission credential types

User-defined designations for items that an applicant provides in support of an application for admission. Examples include transcripts, essays, or personal statements.

admission documentation status

Describes the status of the documentation required of an applicant by the institution.

admission entry qualification status

Indicates if applicant is qualified to apply for a program.

admission fee status

Describes the status of the applicant's payment of an admission fee.

alternative loans

See *private loans*.

admission offer deferment status

Describes the progress of the applicant's request for deferral of admission.

admission offer response status

Describes the status of the applicant's response to an offer of admission.

admission outcome status

Describes the progress of the applicant's request for admission to a program.

Advanced Placement test

Test used to earn credit for college subjects studied in high school. Offered by the Education Testing Service in the spring. AP tests are scored on a scale from 1 to 5 where 5 is the highest possible score. See *educational testing service*.

admission process category

A category created by assigning a system admission-process type to an admission category. Examples include Program Admission, Program Transfer, Re-admission, Short Admission, and Admission to Non-Award Units of Study.

admission process step

A system-defined action set as a guideline for processing or required to complete the admission process.

admission test results

Scores attained on an applicant's standardized admission test.

admission test type

Standardized admission test scores that may be used when evaluating applications for admission.

admission type

See *basis for admission type*.

admission unit outcome status

Describes the progress of the applicant's request for admission to a unit.

advanced standing internal limit

Maximum amount of advanced standing that can be granted in a program for studies undertaken at the institution.

advanced standing qualification recency

Time period, in years, that other studies are recognized for the purpose of granting advanced standing in a program.

advanced standing type

System-defined types describing the effect of granting an application for advanced standing.

advanced standing unit

Unit in which the student is granted advanced standing.

advanced standing unit level

Level at which advanced standing is granted.

alias

See *person alias*.

allocation method

Methods for determining the number of elements used in a disbursement calculation; include STUDENT, PERCOURSE, PERUNIT, EFTSU, and CRPOINT.

allowable materials - examination

Materials that students are allowed to take into an examination.

allow intermission

Indicates if intermission is allowed for the program version.

alternate application ID

User-defined application identifier.

alternate code for calendar instance

Alternate short reference code for identifying a teaching or academic calendar instance, used for entering enrollments and unit and program offerings.

alternate code - program offering

Code identifying the program offering in order to simplify data entry.

alternate ID

See *alternate person identifier*.

alternate person

See *alternate person identifier*.

alternate person identifier

Code by which a person is recognized by other systems and organizations.

alternative exit

Allows students whose achievement satisfies the requirements of another program version to exit the program in which they are currently enrolled.

amortization

Gradual repayment of a loan over an extended period of time through periodic installments of principal and interest.

annual load value

Standard load in credit points used to calculate effective full time student units for a specified year of the program. Used only when the annual load is not constant during all years of the program.

anonymity indicator

Indicates that a panel member has requested anonymity from the research candidate.

AP

See *Advanced Placement test*.

appeal

Formal request for a financial aid administrator to review a student's aid eligibility and possible use of professional judgment to adjust the figures. For example, if a student believes the financial information on the financial aid application does not reflect the family's current ability to pay, for example, because of a parent's death, unemployment, or any unusual circumstances, an appeal must be considered. See professional judgement.

applicant

Prospective student who applies for a program.

applicant intent

The reason for applicant applying for the program; it could be a better career, better job prospects, or to enrich skills.

application

Submitted by an applicant for academic and admission calendars and admission process category (APC).

application completion status

Indicates if institution has received and verified documentary evidence required to be provided by applicant and finds it satisfactory, unsatisfactory, or incomplete.

application fee

Amount a student is to be charged for every application submitted.

application ID

Generated by the system and unique to an application.

application instance

Submitted by an applicant for a different program, location, attendance type, attendance mode in the same session academic and admission calendars, APC and application.

application processing status

Indicates progress of application processing whether completed, incomplete or withdrawn.

application review profile

Used to sort applications for evaluation first by level of study and then by other groupings such as applicant names, institution or applicant addresses, market codes, organizational units, or programs.

application source

Source from which an application is received such as paper, electronic, the web or flat files provided by the government or third-party agencies.

application type

Attached to an APC and defines different rates for application fees and enrollment deposits that students are to be charged.

apply to program indicator

Determines whether certain encumbrance effects apply only to existing student program attempts or apply more broadly.

apportionment percentage

Percentage of the total assessment that the assessment pattern item typically represents.

articulated programs

Programs from which students can continue, with or without credit, directly into a higher program, such as an undergraduate program from which a student can continue directly into a Master's program.

assessable

Indicates whether a unit is subject to fee assessment.

assess fees indicator

Indicates if a program attempt is fee assessable, based on its status. Fee assessable statuses are determined by the system.

assessment ID

See *assessment item ID*.

assessment item

Examination, paper, or other assignment that a student is required to complete for a unit.

assessment item assessor

See *assessor*.

assessment item ID

System-generated number that uniquely identifies an assessment item.

assessment outcome

Grade or mark for a student unit attempt assessment item. Also known as assessment result.

assessment pattern

Grouping of assessment items.

assessment pattern code

Institution-defined code for an assessment pattern.

assessment pattern ID

System-generated number that uniquely identifies an assessment pattern.

assessment program type

Program type to which an assessment item is restricted. If an assessment program type exists, unit assessment items can be assigned only to students whose program type is one of the restricted program types.

assessment result

Grade or mark for a student unit attempt assessment item. Also known as *assessment outcome*.

assessment type

Classification of assessment items, such as examinable or non-examinable.

assessor

Person involved with the assessment of students.

assessor type

Classifies assessors, for example, marker, tutor, and unit-chair.

asset

An item of value, such as a family's home, business, farm equity, real estate, stocks, bonds, mutual funds, cash, certificates of deposit (CDs), bank accounts, trust funds, and additional property and investments.

assistantship

See graduate assistantship.

associate degree

Degree granted by two-year colleges.

asset protection allowance

A portion of a student's parents' assets that are not included in the calculation of the parent contribution, as calculated by the federal methodology need analysis formula. The asset protection allowance increases with the age of the parents.

attempt number - student unit attempt assessment item

Assigned to a student unit assessment item to indicate the number of times a student has attempted the assessment item.

attendance history

Records each change in a candidate's attendance percentage, attendance type, start, and end date.

attendance mode

Describes how a student undertakes a program, for example, on-campus or off-campus. Each attendance mode must be mapped to a government attendance mode.

attendance percentage

Represents the total attendance of the research candidacy and coursework unit attempts.

attendance type

Describes whether a student is classified as full-time or part-time, based on the study load. Each attendance type must be mapped to a government attendance type.

authorization required indicator

Indicates if authorization is required before a student can select a unit set as part of the chosen program.

authorized by

Person who authorizes a unit set to be included in a student's record, if authorization is required, or who authorized a unit set to be removed from a student's record if the unit set is specified as part of an offer of admission.

availability (available date)

Used in context of inquiry package items giving availability of items. For package items, the estimated date when a package item is available. The Available Date field has no functionality attached and must be manually maintained.

award code

Identifies an award, such as Bachelor of Arts or Graduate Diploma of Education, offered by an institution.

award program

Program that yields an award when completed successfully.

award letter

Official document issued by a school's financial aid office listing all financial aid awarded to the student. Provides details of the student's financial need and a breakdown of the financial aid package according to amount, source, and type of aid. Also includes terms and conditions of the financial aid and cost of attendance

information. Students are required to sign a copy of the letter, accepting or declining each source of aid, and return it to the financial aid office. Also known as Financial Aid Notification (FAN).

award program only indicator

Specifies whether a unit is available only to award program students.

award year

Academic year for which the financial aid is requested or received. An award year is a smaller unit than a processing year. See processing year.

bachelor's degree

Undergraduate degree granted by four-year colleges and universities.

balloon payment

A larger than usual payment used to repay the outstanding balance of a loan without penalty. Not all loans allow balloon payments. Simple interest loans such as educational loans, generally allow balloon payments.

bankruptcy

A bankrupt person is declared legally insolvent and all property is distributed among creditors or otherwise administered to satisfy the interests of creditors. Federal student loans, however, cannot typically be discharged through bankruptcy.

base balance

Amount upon which a percentage disbursement formula is based, including GROSS, total income disbursed for a fee type or calendar instance, NET, income available after disbursement by the last fixed formula, and REMAINDER, income remaining after all previous formulas are applied.

basis details

Details upon which an approved advanced standing is based.

basis for admission type

Identifies the main criteria used in granting an applicant admission to a program of study based on their current qualifications and experience. These types can be mapped to government basis for admission types.

base year

Tax year prior to the academic or award year for the year that the financial aid is requested. The base year runs from January 1 of the junior year in high school through December 31 of the senior year. Financial information from the base year determines eligibility for financial aid.

booking cost

Cost of hiring a venue.

budget

See *cost of attendance*.

business days only indicator

Specifies that calculation of the Completion Required By date of a tracking item and the action dates of a tracking step account only for business days.

bursars office

University office responsible for billing and collection of university charges. Also known as Student Accounts Office.

by-pass indicator

Determines if an item's tracking step is bypassed. If a tracking step is bypassed, action dates of subsequent steps are recalculated.

CWS

See *College Work Study*.

calculation data

Charge rates, charge elements, charge methods, rules, and load apportionment used in calculating fees.

calendar category

System-defined categorization of calendar types. Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type. The limited number of calendar categories are accessed from lists of values in the data entry windows. A date alias can be linked to a calendar category, restricting the date alias's use to calendars in that category.

calendar configuration

Procedure where system-defined date aliases are mapped to institution-defined date aliases. This mapping is used in the Admission and Enrollment and Research subsystems to enforce deadlines.

calendar instance

Institution-defined data that defines specific occurrences of a calendar type. A calendar instance is created by assigning a start and end date and a calendar status to a calendar type.

calendar instance relationship

Indicates whether a calendar instance is subordinate or superior in relation to another calendar instance. A calendar instance can have several superior and subordinate calendar instances.

calendar status

Institution-defined status indicating calendar's level of activity. Each calendar status must be assigned a system status, including ACTIVE, INACTIVE, or PLANNED.

calendar type

Institution-defined name given to all calendars of a similar classification. Each calendar type must be assigned a calendar category for the system to determine the functionality of each calendar type.

calendar type abbreviation

Short description of a calendar type used within the institution. Examples include ACAD YEAR for standard academic year, SEMESTER 1 for semester 1 teaching period, TRIMESTER 2 for trimester 2 teaching period, and ENROLLMENT 1 for enrollment period 1.

campus-based aid

Financial aid programs administered by the university. The Federal Government provides the university with a fixed annual allocation that is awarded by the financial aid administrator to deserving students. Such programs include the Perkins Loan, Supplemental Education Opportunity Grant, and Federal Work-Study.

capital gain

Increase in the value of an asset such as stocks, bonds, mutual funds, and real estate between the time the asset was purchased and sold.

career

Grouping of the program for a student (e.g., undergraduate, graduate, etc.)

cancellation

Some loan programs provide for cancellation of the loan in certain circumstances, such as death or permanent special need of the borrower. Some Federal student loan programs have additional cancellation provisions. For example, if students become teachers in certain national shortage areas, they can be eligible for cancellation of all or part of the balance of their educational loans. Repayment assistance is available if the borrower serves in the military; the military pays off a portion of the loans for every year of service.

capitalization

Addition of unpaid interest charges to the principal balance of an educational loan, thereby increasing the size of the loan. Interest is charged on the new balance, including both the unpaid principal and the accrued interest. Capitalizing the interest increases the monthly payment and the amount of money that must be repaid. Capitalization is also known as compounding. See unsubsidized loan.

ceremony closing date alias

Last date when graduands can be automatically allocated to the ceremony.

ceremony round

Period of time when a set of graduation ceremonies is conducted, represented by a calendar; the preparatory events leading up to a ceremony and the clean-up processes after a ceremony.

ceremony round end date alias

End date of the period when possible graduands are automatically identified and created for the ceremony round.

ceremony round start date alias

Start date of the period when possible graduands are automatically identified and created for the ceremony round.

charge element

Component of a fee calculation in which a rate per element is multiplied by the number of elements representing a student's study load over a fee period.

charge method

Determines the number of charge elements used in a fee calculation, including FLATRATE, EFTSU, PERUNIT, and CRPOINT.

charge method apportion

Relationship between fee periods and load periods that determines a student's study units and study load in effective full time student units, credit points, or number of units for the fee period.

charge rate

Rate per element that applies to a fee.

child organizational unit

Subordinate organizational unit.

citation

Text field for citation information to be read during a graduation ceremony.

citizenship 1

Country of primary citizenship.

citizenship 2

Country of secondary citizenship in the event of dual citizenship.

citizenship code

Institution-defined code describing a person's citizenship and residency status that must be mapped to a government citizenship code.

classification code

Links organizational unit accounts with formulas to disburse fee income.

class standing

Student's rank in education. For example, freshman, sophomore, junior, and senior.

collateral

Property used to secure a loan. If the borrower defaults on the loan, the lender can seize the collateral. For example, a mortgage is usually secured by the house purchased with the loan.

combined returns

HESA-defined return based on a student's total program of study leading to a qualification, and involving the completion of a single record for each student, setting out the student-related and programme-related data.

collect mark indicator

Specifies if marks can be recorded when entering results.

collect mark indicator

Specifies if marks can be recorded when entering results.

collection agency

A company often hired by the lender or guarantee agency to recover defaulted loans.

college board

A nonprofit educational association of colleges, universities, educational systems, and any educational institutions.

college work-study

College work-study is a part-time job.

combined degrees

Programs leading to more than one award, such as a B.A/B.S degree leading to both Bachelor of Arts and Bachelor of Science awards.

commencement date

Date a student begins the current program attempt or a research candidate begins research. The default date can be overridden.

commencing student

See *new student*.

completed checkbox - basis details

Indicates if a student completed the program forming the basis of the unit advanced standing.

completion date of tracking item

Date set automatically by the system when the last tracking step is completed.

completion date of tracking step

Date when action for a tracking step is completed.

completion period

Year and time, such as end of year, midyear, or summer, when a student is likely to complete a program's requirements. A ceremony round is associated with one or more completion periods. The graduand identification and creation process selects those student program attempts whose completion period matches one of those associated with the ceremony round.

completion/progression indicator

Indicates if advanced standing details count toward a student's completion and progression requirements for a program.

completion required by

System date derived from the target days set for each tracking type, taking into account the Business Days Only indicator, which can be overwritten if necessary.

compounded interest

Interest paid on the principal balance of a loan and on any accrued interest. Capitalizing the interest on an unsubsidized Stafford loan is a form of compounding. See *capitalization and Stafford loans*.

conditional offer

Offer of admission to a program, contingent on the applicant's fulfilling certain requirements such as presenting original documentation.

conferral date

Date an award is officially given, applied by the system to a group of graduands or manually to individual graduand.

confirmed date

Date when a thesis panel member accepts an invitation to become a member of the thesis examining panel.

confirmed indicator

Confirms a student's enrollment in a program.

confirmed offering indicator

Indicates if the offering detail has been checked and confirmed after being rolled over from a previous calendar version, and selected by default or manually.

constraints - examination

Hindrances to scheduling an examination.

consolidation loan

Combines several student loans into one loan from a single lender. Used to repay balances on additional loans.

contact hours

Minimum number of contact hours, or in-class time for a unit, required by a student for completing a program.

contact indicator

Indicates if a student wishes to be contacted about the university's disability services.

continuing education units

Also known as CEUs. Designates credit point values associated with a unit or unit section that do not grant regular academic credit.

continuing student

See Returning Student.

contract rate

Fee rate negotiated with the institution for a student.

contribution option mapping

Maps contribution payment options to admission categories.

contribution payment option

Describes the possible contribution payment options, for example, Deferred, Upfront, and Exempt.

convocation members

Alumni of an institution.

cooperative education

Program where the student spends time engaged in employment related to their major in addition to regular classroom study.

coordinator - venue

Person who coordinates a venue.

cost of attendance

Total cost of student attending school, including tuition and fees, room and board, allowances for books and supplies, travel, personal, and incidental expenses. Loan fees, if applicable, can also be included in the COA. Child care and expenses for disabilities can also be included at the discretion of the financial aid administrator. Schools establish different standard budget amounts for students living on-campus and off-campus, married and unmarried students, and in-state and out-of-state students. Also known as the cost of education or budget.

count in progression indicator

Indicates if the advanced standing details count toward a student's completion and progression requirements for the program.

country code

Institution-defined code describing a country that must be mapped to a government country code.

credit rating

An evaluation of the likelihood of a borrower to default on a loan. Credit bureaus and credit reporting agencies provide this information to banks and businesses to help them decide whether to issue a loan or extend credit. A credit rating can include a borrower's payment history, a list of current and past credit accounts with balances, employment and personal information, and a history of past credit problems.

creation date

System-generated date indicating when a record is created or date when an assessment item is attached to a student unit attempt.

creation method - grade

Describes how an assessment outcome is loaded, for example, Keying and Upload.

credit point descriptor

Institution-defined name for credit points.

credit points achievable

Number of credit points awarded upon successful completion of a unit.

credit points required

Minimum number of credit points required to complete program requirements.

credits total EFTSU

Total Equivalent Full Time Student Unit (EFTSU) for a program. This term represents the student load for a unit or part of a unit expressed as a proportion of the workload for a standard annual program for students undertaking a full year of study in a particular year of a particular program.

currency code

Indicates the currency in which fee assessments and payments are made.

current ID

Person number of the record chosen to be the current record in the Merge Person ID process.

custodial parent

If a student's parents are divorced or separated, the custodial parent is the one with whom the student lived the most during the past 12 months. The student's need analysis is based on financial information supplied by the custodial parent.

date alias

Institution-defined name of an event, not an actual date. Each date alias must be assigned a date alias category and can be assigned a calendar category. For example, END-LECT represents the last day of lectures in a teaching period.

date alias abbreviation

Short description of a date alias event. Examples include CENSUS DATE for census date, END LECTURES for last day of lectures in teaching period, and WD CUTOFF DATE for last day to withdraw from unit without failing.

date alias category

Institution-defined classification of date aliases according to common attributes for inquiry or reporting purposes. Each date alias must be assigned a date alias category. Examples of date alias categories include fee dates, unit withdrawal dates, and teaching dates.

date alias instance

Individual occurrence of an event created by assigning a date alias to the appropriate calendar instance, and assigning an alias value. For example, to create a date alias instance for the start of an examination period, the user can assign the date alias EXAM-ST to the appropriate calendar instance, and then assign an alias value, 05-JUN-1997.

date alias instance absolute value

Real date allocated to a date alias instance. Examples include 01-JAN-2000 and 15-NOV-1999.

date alias instance offset

Number of days, weeks, months, and years between two date alias instances, used to calculate the alias value for a date alias instance.

date alias offset

See *Offset Date Alias*.

date alias pair

See *Paired Date Aliases*.

date notified - special consideration application

Date inserted by the system when a special consideration application outcome notification letter was created.

declined date

Date when a proposed panel member declined to sit on a thesis examining panel.

default

A borrower's failure to repay according to the terms agreed upon when the promissory note was signed. Default can also occur when a borrower fails to submit requests for deferment or cancellation and is generally referred to as a technical default. When a borrower defaults on a federal student loan, the school, organization holding the loan, guarantee agency, and Federal Government can all take action to recover the money. A borrower is considered to be in default when payments are 180 or more days overdue and no satisfactory arrangements for deferment or forbearance are made. Assets, including Internal Revenue Service (IRS) refunds can be seized and the borrower's credit record or history is negatively affected. Student loan borrowers who are in default are ineligible for additional federal student aid, including grants and loans.

default basis institution

Institution used as the default exemption institution when creating unit or unit level advanced standing records.

default - funding source

Indicates that a funding source is the default for students enrolled in a program. Only one funding source can be the default for a program.

default indicator - assessment item

Indicates that an assessment item is the default item for a unit.

default indicator - assessor type

Indicates that an assessor type is the default type assigned to an assessor record, automatically created by the system when a unit assessment item is created.

default item

Assessment item automatically assigned to students enrolled in a unit.

default major exemption institution

Institution used as the default exemption institution when creating advanced standing records.

default outstanding grade indicator

Indicates that a grade is the default grade used to replace blank grades by the Insert Administrative Grades process.

default pattern indicator - assessment pattern

Indicates that an assessment pattern is the default pattern for a unit. Default patterns are automatically assigned to students enrolled in a unit.

default period

Operating period for a disbursement formula, derived from the start and end date alias instances of an associated fee period, that becomes the default. See also *override period*.

deferment

Occurs when a borrower is allowed to postpone repaying the loan. If the borrower has a subsidized loan, the Federal Government pays the interest charges during the deferment period. The borrower is responsible for the interest that accrues during the deferment period on an unsubsidized loan. The interest charges can be postponed by capitalizing the interest that increases the size of the loan. Most federal loan programs enable students to defer their loans while they are in school at least half time. If the borrower does not qualify for a deferment, a forbearance can be possible. A deferment is not possible if the loan is in default.

deferment status

See *admission offer deferment status*.

deferred payment option

See *government contribution payment option*.

delinquent

If the borrower fails to make a payment on time, the borrower is considered delinquent and late fees can be charged. If the borrower misses several payments, the loan goes into default.

deletion date

System-supplied date indicating when a record was deleted.

deletion date - unit assessment item

Date when an assessment item was deleted from a unit.

deletion date - unit assessment pattern

Date when an assessment pattern was deleted from a unit.

dependant

A child or an additional person who lives with the student, and the student provides the child with more than half of their support. Spouses do not count as dependants in the federal methodology. Two people, such as husband and wife, cannot both claim the same child as a dependant. See independent.

dependency status

Determines to what degree a student has access to parental financial resources.

derived value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are derived if the system determines them by examining the student unit attempts for a program. See *nominated value*.

derive grade indicator

Indicates if a grade should be derived from a mark entered by the user, and used to configure the process to enter online results.

DETYA

Australian Federal Department of Education, Training and Youth Affairs.

differential contribution indicator

Identifies students liable for differential contributions.

direct loans

The William D. Ford Federal Direct Loan Program, also known as the Direct Loan Program, is a federal program where the school becomes the lending agency and manages the funds directly, with the Federal Government providing the loan funds.

disability type

Institution-defined code describing a student's disability that must be mapped to a government disability type.

disbursement

Release of loan funds to the school for delivery to the borrower. Payment is co-payable to the student and school. Loan funds are first credited to the student's account for payment of tuition, fees, room and board, and additional school charges. Excess funds are paid to the student in cash or by check. The disbursement is made in at least two equal installments unless the loan amount is under \$500.

disbursement category

Grouping of disbursement formulas in order to aggregate disbursed amounts for reporting purposes.

disbursement fixed

Predetermined rate per element where the elements are determined by the allocation method.

disbursement journal

Summarizes fee disbursement information available to an external finance system.

disbursement method

Indicates method of disbursing a student's fee income, whether directly to a specified organizational unit, to organizational units that own a program, or to those organizational units responsible for teaching units in a program.

disbursement percentage

Proportion of a gross, net, or remainder amount available for disbursement and split between a number of elements according to the allocation method.

disbursement snapshot

Summarizes the point-in-time disbursements for a fee type in a fee period at the Fee Type Category Instance level.

disbursement snapshot detail allocations

Summarizes the point-in-time disbursements for a fee type in a fee period at the student, student program, and student unit level.

disbursement snapshot details

Summarizes the point-in-time disbursements for a fee type in a fee period at the organizational unit level.

disclosure statement

Provides the borrower with information about the actual cost of the loan, including the interest rate, origination, insurance, loan fees, and any additional finance charges. Lenders are required to provide the borrower with a disclosure statement before issuing a loan.

discipline group

Field of academic learning into which a unit can be classified.

discontinuation reason code

Identifies the student's primary reason for the discontinuation of a student program attempt.

discontinued date

Date a student withdraws from a program or unit attempt.

discontinue enrollment indicator

Alerts staff that it is necessary to discontinue a student's enrollment before authorizing a particular pending fee encumbrance.

discount full payment indicator

Indicates that a discount applies only when payment is made in full for a fee liability.

documentation status

See *admission documentation status*.

due diligence

If a borrower fails to make payments on the loan according to the terms of the promissory note, the Federal Government requires the lender, holder, or servicer of the loan to make frequent attempts to contact the borrower, through telephone and mail, to encourage repayment of the loan and to make arrangements to resolve the delinquency. See delinquent.

due date - unit assessment item

Date when a unit assessment item must be completed and submitted, typically recorded for non-examinable assessment items.

Invoice Workbench

Used for entering invoices in Oracle Payables.

early action

A program with earlier deadlines and notification dates than the regular admissions process. Students applying to an early action program do not commit to attending

the school if admitted, unlike an early decision program. Ivy League schools do not enable applications to more than one Ivy League early action. See *early decision*.

Electronic Data Exchange

Program used by participating schools to electronically receive SARs from the federal processor. At some schools, Electronic Data Exchange (EDE) enables students to electronically file the Free Application for Federal Student Aid (FAFSA). See *student aid report and free application for federal student aid*.

early admission

Program enabling gifted high school juniors to skip their senior year and enroll in college. The term Early Admission is sometimes used to refer collectively to early action and early decision programs. See *early action and early decision*.

early decision

Program with earlier deadlines and notification dates than the regular admissions process. Students who apply to an early decision program commit to attending the school if admitted. Early decision can be applied to only one school.

early exit

Allows an originator to sign off on an item before all steps are complete.

EDE

See *electronic data exchange*.

EFC

See *expected family contribution*.

expected family contribution

Sum of money that the family is expected to be able to contribute to the student's education, as determined by the federal methodology need analysis formula approved by Congress. Includes the parent and student contributions and depends on the student's dependency status, family size, number of family members in school, taxable and nontaxable income, and assets. The difference between the cost of attendance and the expected family contribution is the student's financial need and is used in determining the student's eligibility for need-based financial aid. If a student has unusual financial circumstances such as high medical expenses, loss of employment, or death of a parent that can affect the ability to pay for an education, the financial aid administrator (FAA) can adjust the cost of attendance or expected family contribution to compensate. See *professional judgement*.

ETS

See educational testing service.

Educational Testing Service

Company that produces and administers the SAT and additional educational achievement tests. See *scholastic assessment test*.

effect type

See *system hold effect type*.

effective date

If specified as a parameter in a process, allows the process to access the database on a date other than the current date.

effective date - currency

Date when a currency's rate of exchange applies.

effective end date alias

Date alias linked to the system effective end date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective full time days total

Calculated value indicating the total number of effective full-time days a candidate has to complete research.

effective full time days used

Calculated value indicating the number of effective full-time days used as of the current date.

effective full time student units

Represents the student load for a unit or part of a unit, expressed as a proportion of the workload for a standard full-year program.

effective start date alias

Date alias linked to the system effective start date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective time elapsed for progression indicator

Indicates if unit attempts with a particular administrative unit status are considered to be enrolled for progression time elapsed calculations.

effectively enrolled for progression indicator

Specifies that unit attempts with a particular administrative unit status are considered to be enrolled for progression rule checks.

EFT

See *electronic funds transfer*.

electronic outcome upload file

Comma-delimited text file of student unit attempt outcomes uploaded into the system.

electronic funds transfer

Used by some schools and lenders to wire funds for Stafford and PLUS loans directly to participating schools without requiring an intermediate check for the student to endorse. Money is transferred electronically instead of using paper and is available to the student sooner.

element

See *charge element*.

element range

Range of study loads against which a rate is recorded. See also *charge element*, *charge method*, and *charge rate*.

element range rate

Rate attached to an element range.

eligible noncitizen

Person who is not a U.S. citizen but is eligible for federal student aid. Eligible noncitizens include U.S. permanent residents who are holders of valid green cards, U.S. nationals, holders of form I-94 who have been granted refugee or asylum status, and certain noncitizens. Noncitizens who hold a student visa or an exchange visitor visa are not eligible for federal student aid.

embargo details

Text field to record the details of an embargo placed on the release of a thesis.

embargo expiry date

Date when an embargo placed on the release of a thesis expires.

emancipated

To release a child from the control of a parent or guardian. Declaring a child to be legally emancipated is not sufficient to release the parents or legal guardians from the responsibility of providing for the child's education. See dependency status.

end date alias - fee assessment processing

Last date when an effective date for fee assessment processing can be set.

end date of calendar instance

Date when a calendar instance is no longer effective.

end date - fee period

Last date of a fee period.

end date - grading schema

Last date of a grading schema version.

end date - institution address, location address, organizational address

Date when an address for an institution, location, or organizational unit is no longer effective.

end date - organizational unit

Date when an organizational unit is no longer effective.

end date - program offering instance

Date when a program offering instance is no longer effective.

end date - program version

Date when a program version is closed and all students have completed the program or transferred to other versions, and no additional students can enroll in the version.

end date - unit sets

Date when a unit set version is closed and all student unit sets are complete or ended.

end date - unit version

Date when a unit version is closed and no students can be enrolled.

end time - exam session

Time an examination session concludes.

end time - unit class

Time a unit class concludes.

enrollable indicator

Specifies that the program offering pattern is available for student enrollment.

enrolled credit points

Number of credit points in which a student is enrolled.

enrolled date

Date a unit was enrolled.

enrolled indicator

Specifies that a person is currently enrolled in a program at an institution.

enrollment category

Institution-defined classification of students who share common enrollment characteristics.

enrollment category mapping

Maps enrollment categories to admission categories.

enrollment category procedure detail

Grouping of enrollment procedure steps created by assigning an enrollment method type and a student commencement type to an enrollment category.

enrollment category procedure step

Step recorded for a particular enrollment category procedure.

enrollment method

See Enrollment Method Type.

enrollment method type

How a student enrolls, whether face to face or by phone.

enrollment quota

Restricts the number of students that can be enrolled in a particular unit offering.

enrollment status

Indicates if a student is fulltime or part-time. Generally, a student must be enrolled at least half-time, and in some cases fulltime, to qualify for financial aid.

enrollment step

A system-defined action required to complete the enrollment process.

entitlement

Entitlement programs award funds to qualified applicants such as the Pell Grant program.

entry point indicator

Indicates if a program offering option can be an entry point through Admissions.

entry qualification

See *admission entry qualification status*.

entrance interview

See loan interviews.

ELO

See *expanded lending option*.

estimated processing days

Expected number of days to process a special consideration application.

evaluation order

Sequence in which disbursement formulas are to be resolved, as determined by formula setup.

examinable assessment item

Indicates an assessment item that is an examination.

examinable indicator

Indicates whether the assessment type is examinable or non-examinable.

examination instance indicator - supervisor allocation

Indicates if a supervisor is assigned to a particular assessment item or items during an exam session at a particular venue.

examination material type

Code indicating whether examination material is allowed, not allowed, or supplied at the time of the examination.

examination period

When examinations are held.

examination session venue

See *venue*.

examination session venue supervisor

See *examination supervisor*.

examination supervisor

Person who supervises an examination.

examination supervisor - in charge indicator

Indicates that an examination supervisor type represents the lead or most significant supervisor for an examination session at a particular venue.

examination supervisor type

Indicates the level of responsibility of a supervisor, and the role the supervisor plays.

examination venue indicator

Indicates if a supervisor is assigned to a particular venue during an exam session.

exit interview

See loan interviews.

exit program code

Alternative exit program code.

exit version set

Valid version numbers of an alternative exit program, used by the Progression subsystem.

expanded lending option

Program enabling some schools to offer higher annual and cumulative loan limits to students receiving the Perkins loan. ELO is restricted to schools with a Perkins loan default rate of 15% or less. See Perkins loan.

expected submission date

See *submission date - expected*.

expiry date increment

Period of time, in months, added to the current date which is the default expiry date when creating unit or unit level advanced standing records.

expiry date - program version

Date when a program version expires. Students already enrolled can remain in an expired program version, but new students are not enrolled unless they receive enough advanced standing to allow them to complete program requirements before the version ends.

expiry date - unit sets

Date when a unit set version expires, entered in the process of expiring one version and creating a new one. Students can still be enrolled in expired unit set versions until the version is ended. New students cannot select an expired unit set.

expiry date - unit version

Date when unit version expires. Students already studying this unit version remain enrolled, but no additional enrollments are allowed.

external grade

Grade equivalent to an institution's grading schema grade used when grades are published externally, such as in newspapers.

external limit - advanced standing

Maximum advanced standing granted in a program for studies undertaken outside an institution.

external reference

File location of a correspondence item copy saved outside Oracle Student System; reference generated outside the Student Finance subsystem.

external reference type

Classifies references generated outside the Student Finance subsystem, including Debtor ID, Debit Note, Refund Cheque, and Journal.

FAA

See *financial aid administrator*.

FAF

See *financial aid form*.

FAN

See *award letter*.

FWS

See *federal work study*.

faculty - maximum cross credit points

See *maximum cross credit points*.

FCCI

See *Fee Category Calendar Instance*.

FAT

See *financial aid transcript*.

FAO

See *financial aid office*.

FDSLP

See *federal direct student loan program*.

Federal Family Education Loan Program

Includes the subsidized and unsubsidized Federal Stafford Loan, Federal Perkins Loan, and Parent Loan for Undergraduate Students (PLUS). Funds for these loans are provided by private lenders such as banks, credit unions, and savings and loan associations. Loans are guaranteed against default by the Federal Government.

Federal Direct Student Loan Program

Similar to the Federal Family Education Loan Program (FFELP). Funds for these loans are provided by the U.S. Government directly to students and their parents through their schools. Includes the subsidized and unsubsidized Federal Direct Stafford Loan and the Federal Direct Parent Loan for Undergraduate Students (PLUS). See *federal family education loan program* and *parent loan for undergraduate students*.

federal work study

Program providing undergraduate and graduate students with part-time employment during the school year. The Federal Government pays a portion of the student's salary, making it cheaper for departments and businesses to hire the student. Eligibility for FWS is based on need. Money earned from FWS is not counted as income for the subsequent year's need analysis process.

fee assessment

Process of assessing a student's fee liabilities.

fee assessment effective date

See *effective date*.

fee assessment period

See *fee period*.

fee assessment rate

Charge rate applying to a fee under a specified set of conditions.

fee assessment routine

Process that assesses whether students are liable for fees or are eligible for adjustment to fees, and that creates assessment or adjustment transactions.

fee category

Identifies a distinct fee assessment group of enrolled students liable for a set of fees attached to the fee category. Fee categories are assigned to student program

attempts. Examples include INTERNATNL and DOM-CONTRIBUTION, or domestic students liable for a contribution.

fee category calendar instance

Fee category operating in a specific fee period.

fee category fee liability

See *fee liability*.

fee category mapping

Maps fee categories to admission categories.

fee disbursement formula

One of a set of formulas that calculates and allocates disbursement amounts from income derived from a student's fee in a specific fee period. See also *allocation method*, *disbursement method*, *evaluation order*, *base balance*, *disbursement percentage*, and *disbursement fixed*.

fee encumbrance

Encumbrance applied as a result of nonpayment or underpayment of fees.

fee encumbrance status

Describes the status of activity of a fee encumbrance recorded against a student, and maps to a system status.

fellowship

Aid given to graduates to help support their education. Some fellowships include a tuition waiver or a payment to the university in lieu of tuition. Most fellowships include a stipend to cover reasonable living expenses. Fellowships are a form of gift aid and are not repaid.

fee liability

Used for a single fee type within a single fee category.

federal methodology

Need analysis formula used to determine the expected family contribution. The federal methodology takes into account family size, number of family members in college, taxable and nontaxable income, and assets. The net value of the family residence is not included.

fee period

When a particular fee, fee category, and associated data apply.

fee sponsorship status

Describes the status of activity of the sponsorship of a student program attempt, and maps to a system status.

fee sponsor status

Describes the standing of a particular sponsor in an institution.

fee structure status

Describes the activity of a fee type, category, or liability.

fee type

Name of a fee, such as CONTRIBUTION, GSF, and MEDIBANK. A fee type can be assigned as a fee liability of many fee categories.

fee type calendar instance

Fee type operating in a specific fee period.

federal processor

Organization that processes information submitted on the Free Application for Federal Student Aid (FAFSA) and assesses eligibility for federal student aid.

FFELP

See federal family education loan program.

field of study

In the Program Structure and Planning subsystem, a classification of programs in terms of their subject matter. In the Research subsystem, a code representing the field of study is recorded for each candidate. The field of study percentage must total 100% for a candidacy.

financial aid

Money provided to the student and family to help pay for the student's education. Includes gift aid such as grants, scholarships and self-help aid including loans and employment.

financial aid administrator

College or university employee involved in the administration of financial aid. Also known as financial aid advisors or counselors.

financial aid form

Previously known as the Financial Aid PROFILE. The Financial Aid PROFILE is a supplementary financial aid form processed by the College Scholarship Service (CSS). A Financial Aid Profile does not require an application for federal student financial aid; the Free Application for Federal Student Aid is sufficient. The Financial Aid PROFILE is used by many private colleges and universities for awarding institutional funds.

financial aid notification

See award letter.

financial aid office

College or university office responsible for determining financial need and awarding financial aid.

financial aid package

Includes grants, scholarships, loans, and work-study employment from all sources offered to a student to enable attendance at the college or university. Note that unsubsidized Stafford loans and PLUS loans are not considered part of the financial aid package, since these financing options are available to the family to help meet the expected family contribution.

financial aid transcript

Record of all federal aid received by the student at each school attended. If a student previously attended an institution of higher education and is now applying for financial aid from a different university, the university requires a FAT from each of the schools previously attended, regardless of whether aid was received. This is required by federal law. A student must submit a FAT even if in high school at the time. The FAT is not the same as an academic transcript.

finalized indicator

Indicates if an outcome for a student unit attempt is finalized.

financial safety school

A school that definitely admits a student and is inexpensive enough to be attended with little or no financial aid.

final result

Result of the thesis examination processes. A result code is selected that must map to a system result of type FINAL. See *thesis result code*.

final result indicator

Set for certain system thesis result codes to indicate that they are a final result. See *thesis result code*.

final title indicator

Indicates if the specified title is the final title for the thesis.

financial period

Institution's financial year.

first-time borrower

A first-year undergraduate student who has no unpaid loan balances outstanding on the date a promissory note is signed for an educational loan. The first loan payment is disbursed 30 days after the first day of the enrollment period. If the student withdraws during the first 30 days of classes, the loan is canceled.

fixed disbursement

See *disbursement fixed*.

forbearance

Lender allows the borrower to temporarily postpone repaying the principal, but the interest charges continue to accrue, even on subsidized loans. The borrower continues paying the interest charges during the forbearance period. Forbearances are granted at the lender's discretion, usually in cases of extreme financial hardship or unusual circumstances when the borrower does not qualify for a deferment. The borrower cannot receive a forbearance if the loan is in default.

forced attendance mode indicator

Indicates whether a student program attempt attendance mode is forced or restricted. Selecting the check box causes the system to highlight the student program attempt attendance mode if the derived attendance mode conflicts with the forced attendance mode.

forced attendance type indicator

Indicates whether a student program attempt attendance type is forced or restricted. Selecting the check box causes the system to highlight the student program attempt

attendance type if the derived attendance type conflicts with the forced attendance type.

forced location indicator

Indicates whether a student program attempt location, or campus, is forced or restricted. Selecting the check box causes the system to highlight the student program attempt location if the derived location conflicts with the forced location.

force processing of incomplete package

Overrides any limitations placed on the processing routine to process an incomplete package.

formula number

Supplied automatically by the system to identify each disbursement formula in a set. See also *fee disbursement formula*.

Free Application for Federal Student Aid

Form used to apply for Pell Grants and all additional need-based aid. No fee is charged to file a FAFSA.

full time equivalence

The institution must determine the full time equivalence for a student in a reporting year. The figures are then reported to the Higher Educational Statistics Agency as a percentage. Full time, full year students would normally be returned as 100.00 and part-time students returned as a proportion of an equivalent full-time course. The proportion of part-time study can be estimated on either a time or credit basis. This allows a more accurate assessment of the contribution of non-full time study that can be obtained by the use of arbitrary multipliers.

funding source

Institution-defined source of funds applicable to student program attempts.

further education

Education for students over compulsory school age (currently 16 in England) which does not take place in a secondary school. It may be in a sixth-form college, a further education college or a higher education institution. Further education courses are generally up to the standard of GCE A-level or NVQ Level 3.

gapping

Failing to meet a student's full demonstrated need. See unmet need.

generic program

Program attribute indicating that students in a program can transfer to any program in the related group at any point during their enrollment. Unlike nongeneric programs in the group, a generic program cannot be a transfer destination.

garnishment

Withholding a portion of a defaulted borrower's wages to repay an outstanding loan without consent.

gift aid

Financial aid, such as grants and scholarships, that is not repaid.

government Aboriginal or Torres Strait Islander code

Indicates if a student identifies as an Australian Aboriginal or Torres Strait Islander.

government admission center

External body that processes applications for admission to government institutions.

government admission code

Describes the matriculation category assigned by the government to an applicant on the basis of current qualifications. These codes can be mapped to user-defined codes. Code recognized by the relevant government admission center to which an institution-defined admission code is mapped.

government attendance mode

Indicates whether a student undertakes a program internally or externally.

government attendance type

Indicates whether a student is classified as part-time or full-time, based on his or her study load.

government basis for admission type

Government-defined code identifying the basis for granting admission to a program of study.

government citizenship code

Indicates student's citizenship and residency status.

government contribution band

Bands representing different contribution rates applicable to students liable for differential contributions.

government contribution payment option

Type of government-defined contribution payment option, including deferred, upfront, and exempt.

government country code

Government-defined code describing a country.

government disability type

Government-defined code describing a student's disability.

government discipline group

Government-defined field of study into which a unit is classified.

government institution code

Government-defined code for an institution. Institution codes defined by the institution can be mapped to government institution codes.

government language code

Government-defined code describing the non-English language used at a student's permanent residence.

government level of completion

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's progress toward completion of his or her government education studies, can be mapped.

government level of qualification

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's current government education qualifications, can be mapped.

government permanent resident code

Government-defined code indicating a student's permanent residency status.

government program load

Aggregate effective full time student units for a program expressed in tenths. For example, 3.0 is represented as 30.

government program type

Government-defined classification of higher education programs. Each institution-defined program type is mapped to a government program type.

government type of activity code

Government-defined code describing research undertaken by a research candidate.

grace days

Number of days added to a payment's due date to defer payments.

grace period

Period after graduation when the borrower is not required to repay student loans. The grace period can be used if the borrower leaves school for a reason other than graduation or falls below half-time enrollment. Depending on the type of loan, the borrower has a grace period of six months for Stafford loans or nine months for Perkins loans before making repayments. PLUS loans do not have a grace period.

grade

Indicates student's level of achievement in a unit attempt; assessment outcome; assessment result; code representing a student's level of achievement that must be mapped to a system result type.

grade conversion

A feature in the Admissions subsystem that converts an applicant's grade or grade point average from one institution to the grading scale in use at the admitting institution.

graduate assistantship

Two types of graduate assistantships are available, teaching assistantships and research assistantships. TAs and RAs receive a full or partial tuition waiver and a small living stipend. TAs are required to perform teaching duties. RAs are required to perform research duties, not necessarily related to the student's thesis research. See *teaching assistantship* and *research assistantship*.

graduate teacher training registry

A central agency acting on behalf of universities, colleges of higher education, and certain groups of schools in England and Wales. Processes applications for entry to pre-service Postgraduate Certificate in Education (PGCE) courses. This service is provided for the GTTR as one of the small systems operated by Universities and Colleges Admission Service (UCAS).

gttr

See *Graduate Teacher Training Registry*.

grade exists

Electronic results upload configuration setting that defines the action taken by the system when a grade already exists in the upload file.

grade inclusion indicators

Designate where unit attempt grades can or cannot be published, for example, Noticeboard and Newspaper.

grade invalid

Electronic results upload configuration setting that defines the action taken by the system when a grade specified in the upload file does not exist in the grading schema used.

grade point average

Measure that averages the grades a student receives, taking into account the total study load.

grant

Type of financial aid based on financial need that is not repaid.

grade point average value

Numerical value assigned to a grade to calculate a student's grade point average.

graduated repayment

Repayment schedule if the monthly payments gradually increase over the repayment period.

grade rank

Compares a grade to other grades in the same grading schema, used in rules and reports.

grading schema

Describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist for an institution.

grading schema code

Code identifying the grading schema.

grad students indicator

Indicates if a student can graduate after completing a program. This indicator is not set for non-award programs.

graduand

Student eligible or potentially eligible to graduate in a particular ceremony round, and with a graduand record created.

graduand approval status

Indicates if formal approval to graduate has been received and a graduand's progress toward graduating in a particular ceremony round. Associated with a system graduand approval status, including WAITING, APPROVED, and REJECTED.

graduand status

Indicates the current status of a graduand and a graduand's progress toward graduating in a particular ceremony round. Associated with a system graduand status, including POTENTIAL, ELIGIBLE, GRADUATED, and SURRENDER.

graduand type

System-defined values assigned to graduands to define their graduation intentions, including ATTENDING, attending graduation ceremony to receive award; INABSENTIA, not attending ceremony to receive award; ARTICULATE, declining award to pursue a higher program award; DEFERRED, receiving award in a later ceremony round; UNKNOWN; and DECLINED, declining award for other reasons.

graduation cycle

Period of time when all ceremony round activity occurs.

graduation note type

Identifies purpose of a note attached to a graduation ceremony record to record extra information required by an institution. For example, note type GRAD-GUEST is assigned to a ceremony note listing guests attending the ceremony.

granting status

Describes the progress of a student's application for advanced standing.

gross income

Income before taxes, deductions, and allowances are subtracted.

group code

Code identifying a Person Number Group defined by the creator of a Person Number Group.

group ID

System-generated sequence number identifying a person number group.

group membership

See *tracking item group membership*.

guaranteed - entry assessment score

Score that guarantees an applicant an offer of admission to a program offering pattern, if it is achieved.

guarantee agency/guarantor

State agencies responsible for approving student loans and insuring them against default. Guarantee agencies also oversee the student loan process and enforce federal and state rules regarding student loans.

guarantee fee

Small percentage of loan paid to the guarantor to insure the loan against default. Fee is usually 1% of the loan amount and by law cannot exceed 3% of the loan amount.

guaranteed student loan

Loan insured against default. Federal Government agrees to repay the loans in case of default. Each loan is charged a guarantee fee to cover the costs of defaulted loans. This loan is also known as the Stafford loan.

half-time

Financial aid programs usually require that the student is enrolled at least half-time to be eligible for aid. Some programs require the student to be enrolled fulltime.

health education assistance loan

Low interest loan administered by the U.S. Department of Health and Human Services. Available to medical school students pursuing medicine, osteopathy, dentistry, veterinary medicine, optometry, podiatry, clinical psychology, health administration, and public health. Undergraduate pharmacology students are also eligible.

health professions student loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS). See *primary care loan*.

hesa

See *Higher Education Statistics Agency*.

hercules

See *Higher Education Recruitment Communications between UCAS and Local Electronic Systems*.

hesa code

A code specified by HESA as a valid value for one of the HESA fields.

hesa validation

The file submitted to HESA must have a specified format and individual fields can only take certain values - a file that meets the criteria specified by HESA is deemed valid.

hesa validation kit

Is provided by HESA so that institutions can validate the file produced before it is submitted to HESA. HESA does not accept any files that fail the validation checks.

higher education recruitment communications between ucas and local electronic systems

The online UCAS system for managing applications whereby institutions can communicate directly with this system using SQL instead of a database link.

higher education

Programs that are above the standard of GCE A-levels or National Vocational Qualification (NVQ) Level 3. They include degree courses, postgraduate courses and Higher National Diplomas. Higher education takes place in universities and higher education colleges, and in some further education colleges.

higher education statistics agency

The Higher Education Statistics Agency is the official body responsible for the collection and publication of statistical data about higher education. HESA was set up by UK universities and higher education colleges to collect, analyze and report on Higher Education statistics as the basis of a comprehensive management information system. HESA collects, cleans, and collates the data for its own analysis as well as preparing extracts of the data records for government education departments, funding bodies, and the institutions themselves. HESA also publishes reports and bulletins on HE in the UK which are derived from the data.

highest qualification on entry

The highest level of entrance qualification held by the student at the time of enrolling into a program of study, that is reported to HESA.

historical faculty - maximum cross credit points

See *maximum cross credit points*.

history end date - institution history; organizational unit history

Date and time marking the end of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

history start date - institution history; organizational unit history

Date and time marking the start of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

hold

See *fee hold*.

holder

Lender, institution, or agency holding legal title to a loan such as the bank that issued the loan, a secondary market that purchased the loan from the bank, or a guarantee agency if the borrower defaulted on the loan.

hold category

System-defined classification of an encumbrance as ADMINISTRATIVE, if it relates to an administrative matter, or ACADEMIC, if it relates to an academic matter.

hold effect type

Result of applying a hold to a student or student program attempt. See *system hold effect type*.

hold indicator

Specifies that a person currently has a hold applied to his or her record.

hold schedule

Includes dates when fee holds are recorded for students defaulting on fee payments.

hold type

Institution-defined name that describes the reason for, or the result of, a hold.

honors level

Institution-defined level of a Bachelor Honors award that can be mapped to a government honors level.

HPSL

See primary care loan.

ignore warnings indicator - exam supervisor allocation

Suppresses warning messages when the system enters default exam supervisors.

IM

See *institutional methodology*.

income contingent repayment

Under an income contingent repayment schedule, the size of the monthly payments depends on the income earned by the borrower. As the borrower's income increases, so do the payments. The income contingent repayment plan is not available for PLUS loans.

in-state student

Student who meets the legal residency requirements for the state and is eligible for reduced in-state student tuition at public colleges and universities.

intensity-based approach

A method of calculating student full time equivalence based on the intensity of study of a year of program, a full time year of program having an intensity of study of 100.

internship

Part-time job during the academic year or summer months a student receives supervised practical training in their field. Internships are often closely related to the student's academic and career goals, and can serve as a precursor to professional employment. Some internships provide very close supervision by a mentor in an apprenticeship-like relationship.

interest

Fee charged by the lender for borrowing money, usually calculated as a percentage of the principal balance of the loan. Percentage rate can be fixed for the life of the loan, or it can be variable, depending on loan terms. All federal loans issued after October 1992 uses variable interest rates that are pegged to the cost of U.S. Treasury Bills.

inactive calendars

Calendars to which data can no longer be added.

inactive institution

Institution for which new data cannot be entered, except for maintaining institution address details.

inactive organizational unit

Organizational unit for which new data cannot be entered, except for maintaining organizational unit address details.

in charge indicator - exam supervisors

Specifies a supervisor as the senior or organizing supervisor for an exam session at a particular venue.

include deleted indicators

Set to display records that have been deleted.

include deleted relationships indicator

Causes deleted relationships to be displayed when a query is executed.

include resolved outcomes indicator - non-enrolled unit outcomes

Displays resolved outcomes when performing a query on non-enrolled student outcomes.

income type

Indicates if an assessed debt amount or a payment amount is to be disbursed.

indicated mailing date

Date an inquiry package is to be mailed, used to ensure timely mailings.

industrial

Effective full time student units for a unit of study or part of a unit of study generated by work experience in a particular industry, reported in the student load file.

independent

An independent student is one or more of the following: at least 24 years old as of January 1 of the academic year; married; a graduate or professional student; has a legal dependant other than a spouse; a veteran of the U.S. Armed Forces; an orphan or ward of the court or was a ward of the court until aged 18. A parent refusing to provide support for their child's education is not sufficient for the child to be declared independent. See also dependant.

industry links

Records any industries associated with a thesis or research candidacy.

IRA

See individual retirement account.

individual retirement account

Type of retirement fund. It is illegal to borrow money from an IRA to help pay for a child's education.

inquiry

A request from a prospective applicant for information about a program of studies.

inquiry application number

Sequence number identifying a person's inquiry.

inquiry characteristic type

Institution-defined classification of types of prospects, such as post graduate.

inquiry date

Date an inquiry is made.

inquiry information type

Institution-defined classification of inquiries likely to be made, such as travel, accommodation, and fees.

inquiry package item

Collateral items sent to prospective applicants. These can be grouped by inquiry information type, by program, or by inquiry level.

inquiry source type

Classification of source that prompts an admission inquiry, such as newspaper advertisement or school liaison activity.

inquiry status

Institution-defined status of an inquiry.

insurance fee

Fee passed on by lender to the Federal Government as insurance against default. Insurance fees are charged as the loan is disbursed and typically run to 1% of the amount disbursed. See guarantee fee.

Institutional Student Information Report

Electronic version of SARs delivered to schools by ED express.

institution address

One or more addresses can be recorded for an institution, if they are different address types, for example, campus address and correspondence address.

institution - basis details

Institution where a student undertook the studies resulting in unit advanced standing.

institution code

Institution-defined code for an institution that can be mapped to a government institution code.

institution fee

Institution-wide fee levied once, even if a student has concurrent program attempts.

institution history

Chronological record of changes made to data defining an institution.

institutional methodology

Formula referred to if a college or university uses its own formula to determine financial need for allocation of the school's own financial aid funds

institution status

Indicates the level of activity of an institution. Institutional statuses are institution-defined and map to the system institution status, including ACTIVE and INACTIVE.

installment loan

Consumer loan if the principal and interest are repaid on a regular, usually monthly, schedule. Payments are called installments and are of equal amounts.

internal revenue service

Federal agency responsible for enforcing U.S. tax laws and collecting taxes.

intake target type

Types of applicants or students an institution has established targets for when offering programs, such as commencing students, regional entry students, and returning students.

internal limit - advanced standing

Maximum amount of advanced standing that can be granted in a program for studies undertaken at an institution.

international

See *person international details*.

international agent details

Details of an international agent or agency through which a student was recruited.

invalid mark and grade combination

Mark entered in system is outside the range of marks associated with grades entered in the grading schema.

invalid mark/grade allowed indicator

Indicates if invalid mark and grade combinations can be entered, and used to configure the process for entering online results. Invalid mark and grade combinations must be corrected at a later time.

item limit

Maximum number of assessment items an assessor is allocated, used by the assignment tracking process to limit the number of assignments sent to each assessor for marking.

ISIR

ISIR: Institutional Student Information Report. A record of student's data approved by the US Department of Education, based on which institutions determine the student's need and eligibility for financial aid.

key check-digit indicator

Indicates if the two-digit check digit must be entered before an assessment result can be entered for a student, and used to configure the process for entering online results. Check digits are the last two digits of the person ID.

language code

Institution-defined code describing the non-English language used at a student's permanent residence that must be mapped to a government language code.

last submission date

See *submission date - last*.

last year of enrollment - basis details

Year when a person was last enrolled in a program forming the basis of a unit advanced standing.

latest processing date

Last date an inquiry was processed by the Process Admission Enquiries batch job.

lender

Bank, credit union, savings and loan association, or additional financial institution that provides funds to the student or parent for an educational loan. Some schools now participate in the Federal Direct Loan program and no longer use a private lender, since loan funds are provided by the U.S. Government.

length or duration - assessment item

Length or duration of a non-examinable assessment item, for examples, an essay of 2000 words and a 90-minute seminar.

leveraging

If a school offers a talented student extra financial aid, regardless of need, the student is more likely to enroll. Leveraging is the controversial practice of calculating how to attract such students and customizing aid offers to optimize the quality of the incoming class.

level

Level at which data in the Student Finance subsystem is recorded determines the scope of its applicability.

level - hold

Level within the hierarchy of effect types.

liability

Referring to a student, the amount the student owes as a result of fee assessment. Referring to fees, a fee type when assigned to a fee category.

library catalogue number

Library catalogue number of a completed thesis.

library lodgement date

Date when a research student's thesis is placed in the library.

load incurred indicator

Indicates if load is incurred for a student attempt with the related administrative unit status.

loan forgiveness

Federal Government cancels all or part of an educational loan because the borrower meets certain criteria, such as performing military or volunteer service.

line of credit

A bank, credit union, savings and loan association, or additional financial institution that provides funds to the student or parent for an educational loan. Some schools now participate in the Federal Direct Loan program and no longer use a private lender, since loan funds are provided by the U.S. Government.

loan interviews

Students with educational loans are required to meet with a financial aid administrator before receiving the first loan disbursement and again before graduating or leaving school. During these counseling sessions, called entrance and exit interviews, the financial aid administrator reviews the repayment terms of the loan and the repayment schedule with the student.

loan consolidation

See *consolidation loan*.

local currency indicator

Indicates if a currency code represents currency typically used by an institution.

local institution indicator

Indicates if an institution is the home institution. Only one institution is typically identified as the home institution.

location

Campus, study center, or other place where an institution conducts business or holds classes. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

location code

Code of a location owned or used by an institution.

location - maximum cross credit points

See *maximum cross credit points*.

location type

Institution-defined classification of locations where an institution conducts business or holds classes. Location types can be mapped to system location types.

logical delete date - unit assessment item

See *deletion date - unit assessment item*.

logical delete date - unit assessment pattern

See *deletion date - unit assessment pattern*.

lower load limit

Lower load value of the enrollment load range, in credit points, that defines a student's attendance type in an academic period.

lower normal rate override indicator

Specifies that a rate for a fee reverts to normal if the normal rate is lower than a contract rate.

lower range

See *element range*.

maturity date

Date when a loan becomes due and must be repaid in full.

MDE

See multiple data entry processor.

mail delivery working days

Indicates the average number of working days required for correspondence to reach an examination location using standard mail.

mailed date

Date an inquiry package item was mailed.

main access route for varsity information

MARVIN is a system for transferring data between UCAS and institutions using flat files.

major exemption institution

Institution where the majority of an advanced standing exemption was obtained.

major field of study

Describes which of the specified fields of study is the major one.

mandatory indicator

Specifies that a particular piece of data must be recorded as part of the enrollment process.

manual assessment, manual adjustment

Distinguishes assessment transactions created for an individual student through the Manual Fee Assessment window, rather than automatically through the fee assessment process.

manual entry indicator

Specifies that a fee assessment was a manual or system-calculated assessment.

mark

Numerical value indicating a student's level of achievement in a unit attempt.

mark entry mandatory indicator

Specifies that a mark must be recorded and used to configure the electronic upload process and the process for entering online results.

mark/grade invalid

Electronic results upload configuration setting that defines the action taken by the system when a mark and grade combination recorded in the upload file is invalid.

mark range - grade

Minimum and maximum numerical value limiting the range of marks a student can achieve to receive a particular grade.

marvin

See *Main Access Route for Varsity Information*.

maximum cross credit points

Maximum number of credit points in which a student can enroll in an academic calendar outside of the enrolled program location or mode.

maximum intermission

Total months of intermission a student is allowed during a program.

maximum submission date

Latest date a thesis can be submitted, required for a research candidacy. This system-derived date can be overridden.

member type

Institution-defined classification of organizational units by structure level. Each organizational unit must be assigned a member type, including FACULTY, SCHOOL, DEPARTMENT, and DIVISION.

merit-based

Financial aid that depends on the student's academic, artistic, or athletic merit, for example, and does not depend on the existence of financial need. Uses the student's grades, test scores, hobbies, and special talents to determine eligibility for scholarships.

merge table name

Name of a database table used in the Person Number Merge process.

milestones - date reached

Date when a milestone is completed, successfully or unsuccessfully.

milestones - due date

Date when a milestone is to be completed, calculated from the offset days value, or entered.

milestone status

Institution-defined status showing the progress of a milestone, and mapped to a system-defined milestone status, including PLANNED, ACHIEVED, FAILED, and RE-PLANNED.

milestone type

Institution-defined classification of milestones, for examples, Six Month Report, Literature Review Report, Project Selection, Conference Presentation, Draft Thesis Available, and Miscellaneous.

minimum - entry assessment score

Minimum score required by an applicant to be considered for an offer of admission to a program offering pattern. A program offering pattern assessment score takes precedence over a minimum entry assessment score established at the program offering instance level.

minimum submission date

Earliest date a thesis can be submitted, required for a research candidacy. This system-derived date can be overridden.

minimum submission percentage

Percentage of effective full-time days that must pass before a research thesis can be submitted. This value is used to calculate submission dates for a research candidacy.

mode - maximum cross credit points

See *maximum cross credit points*.

module return

A HESA-defined return based on the modules reported in the Student return.

multiple data entry processor

Company that processes FAFSA forms submitted by students. The College Scholarship Service (CSS) and PHEAA are both MDE processors.

NHCS

See national health corps scholarship.

NMAS

See *Nursing and Midwifery Admissions Service*.

NMSQT

See preliminary scholastic assessment test.

NSL

See nursing student loan.

name of institution

Institution-defined name of an institution that can be mapped to a government institution. The institution-defined name can be the same as the name of the government institution.

national merit scholarship qualifying test

See *preliminary scholastic assessment test*.

negative adjustment

Any activity that partially reduces the balance of a student's account based on fee calculation.

national health corps scholarship

Scholarship program administered by the U.S. Department of Health and Human Services (HHS). Available to medical students studying allopathic and osteopathic medicine and to dentistry students.

need

The difference between the cost of attendance and the expected family contribution is the student's financial need; the gap between the cost of attending school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is known as need analysis.

The following formula shows how need is calculated:

Cost of Attendance - Expected Family Contribution = Financial Need

See cost of attendance and expected family contribution.

need analysis

Determines a student's financial need by analyzing financial information provided by the student, the student's parents, and spouse, if applicable, on a financial aid form. The student must submit a need analysis form to apply for need-based aid. Need analysis forms include the Free Application for Federal Student Aid (FAFSA) and the Financial Aid Profile.

national service trust

National community service program. If a student participates in this program before attending school, the funds can be used to pay educational expenses. If the student participates after graduating, the funds can be used to repay federal student

loans. Eligible types of community service include education, human services, the environment, and public safety.

national student clearinghouse

A non-profit organization that aids in the student loan program for schools in the United States.

need-based

Financial aid that depends on a student's financial situation. Most government sources of financial aid are need-based.

need-blind

An offer of admission made to a student without considering the student's financial situation. Most schools use a need-blind admissions process. Some schools use financial need to decide whether to include marginal students in the wait list.

new student

Student enrolled in a program for the first time before the commence cutoff date alias, usually set to the census date, has been reached.

new borrower

See first-time borrower.

need-sensitive

The student's financial situation is taken into account when deciding whether to admit the student. Some schools use need-sensitive admissions when deciding to accept a borderline student or to take the student from the waiting list.

no assessment

Indicates if a student seeks a formal grade for a student attempt.

nominated value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are nominated if the user enters them in the relevant fields in the Enrollments or Admissions windows. See *derived value*.

non-allowable materials - examination

Materials that students are not allowed to take into an examination.

non-examinable assessment item

Assessment item that is not an examination, for example, paper, project, or other assignment.

no program attempts - electronic results upload

Electronic results upload configuration setting that defines the action taken by the system if a person specified in the validation file does not have any recorded program attempts.

note format type

System-defined note format, including OLE and text.

note type

Institution-defined classification of notes related to a program. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's official handbook.

notification date

Date a debtor was notified about a fee assessment.

notional percentage grade distribution

Minimum and maximum percentage of students expected to receive a specific grade for a particular unit offering.

number restriction

Limits number of items relevant to a particular admission step, for example, MULTI-OFF allows a maximum number of offers to be established.

number of seats - venue

Maximum number of seats in a venue.

number units before intermission

Number of units a student must complete before intermission is possible.

nursing and midwifery admissions service

An agency which acts on behalf of the national health service executive (NHS Executive) to process applications for full-length, diploma level, pre-registered nursing and midwifery programs at universities and colleges of higher education in England. This service is provided for nursing and midwifery admissions system as

one of the small systems operated by the universities and colleges admissions service.

nursing student loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS) and available to students enrolled in nursing programs.

obsolete person number

Person number of the obsolete record in the Merge Person Number process.

offer date response offset

Number of days added to an applicant's offer date to calculate a default offer response date.

offered indicator

Specifies that the unit offering option is available for offering.

official notification

See *grade inclusion indicators*.

offset alias value

See *date alias instance offset*.

offset date alias

Event from which the date of another event is calculated by offset. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after the census date CENSUS, CENSUS is the offset date alias. Offsets can be positive or negative.

offset days for milestone

Number of days entered for a default milestone when defining program default milestones. This number is offset from the candidate's commencement date.

offset duration

A period of time before or after an event used to define the date of the event. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after the census date, CENSUS, the four weeks is the offset duration. Offsets can be positive or negative.

only as subordinate indicator

Specifies that the unit set can only be selected as a subordinate unit set within the related program offering. For example, a particular minor must always be selected within a particular previously selected major.

optional payment indicator

Indicates whether a fee is optional or mandatory. Penalties and encumbrances do not apply to optional payments.

order in award

Order in presentation of a unit set group, or major, in a ceremony.

order in ceremony

Order in presentation of an award in a ceremony.

order in presentation

Graduand's position in the order of presentation of a ceremony.

order of precedence

Evaluates the fee assessment rate that should apply when a student's method of studying a program fulfills the conditions for more than one fee assessment rate.

organizational unit

Business unit of an institution or organization, including faculty, school, department, and division.

organizational unit account

Account linked to an organizational unit that receives disbursement income.

organizational unit address

One or more addresses can be recorded for an organizational unit if they are different address types. For example, an administrative branch can have a postal address and a physical address.

organizational unit code

Institution-defined code for an organizational unit. An organizational unit is identified by its code and start date.

organizational unit history

Chronological record of changes made to data defining an organizational unit.

organizational unit location

Physical location of an organizational unit. An organizational unit can have multiple locations. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

organizational unit - ownership of unit version

Code of an organizational unit that owns, or is responsible for, a unit.

organizational unit start date

Date when an organizational unit is effective. The organizational unit is identified by its code and start date.

organizational unit status

Institution-defined status indicating the level of activity of an organizational unit record, mapped to a system status of ACTIVE or INACTIVE.

organizational unit type

Institution-defined classification of organizational units. Each organizational unit must be assigned an organizational type. Examples include ACADEMIC and ADMINISTRATIVE.

origination fee

Fee paid to the bank as compensation for the cost of administering the loan. Origination fees are charged as the loan is disbursed and typically run to 3% of the amount disbursed. A portion of this fee is paid to Federal Government to offset the administrative costs of the loan.

outcome

Grade or mark for a student unit attempt assessment item. Also known as result.

outside resource

Aid or benefits available because a student is in school and calculated after need is determined, such as outside scholarships, prepaid tuition plans, and VA educational benefits.

outside scholarship

Scholarship originating from sources other than the school and federal or state government.

out-of-state student

Students who do not meet the legal residency requirements for the state and are often charged a higher tuition rate at public colleges and universities.

outcome date

Date when an outcome is recorded for an assessment item.

overawards

Students who receive federal support cannot receive awards totaling more than \$400 in excess of financial need.

override amount type

Overrides the amount type for a target.

override credit point increment

Allowable increment by which override credit points can be specified.

override credit point maximum

Maximum credit points allowed for a unit attempt.

override credit point minimum

Minimum credit points allowed for a unit attempt.

override credit points indicator

Indicates if enrolled and achievable credit points can be overridden at the student unit attempt level.

override due date - student unit attempt assessment item

Assessment item due date extension granted to a student, typically for an assignment.

override end time - exam session instance

Used when an examination end time differs from a session end time.

override end time - supervisors

When a supervisor ends supervision of an examination. If no value is specified, the system uses the end time of the exam session as the default.

override period

Allows adjustment within the default period of the dates between which a disbursement formula operates. See also *default period*.

override start time - exam session instance

Used when an examination start time differs from a session start time.

override start time - supervisors

When a supervisor starts supervision of an examination. If no value is specified, the system uses the start time of the exam session as the default.

override title indicator

Indicates whether the title of a unit can be overridden at the student unit attempt level.

override title - unit sets

Overrides the unit set title within a context program version.

overseas

Indicates an institution based in another country.

overwrite grades allowed indicator

Indicates if a saved assessment result can be overwritten when entering new results, and used to configure the process for entering online results.

owning location

Superior location in a location relationship. For example, a university's location is an owning location of its campuses' locations. A location can have multiple owning locations. See also *parent and child relationship*.

packaging

Process of assembling a financial aid package.

paid date

Date when a thesis panel member is paid.

paired date aliases

Two date aliases that define a period of time. For example, the date aliases for start semester break and end semester break are paired to define the period of the break.

paired dates

See *paired date aliases*.

panel chair indicator

Selected for those institution-defined thesis panel member types that can be the chairperson of an examining panel.

panel member type

Institution-defined classification of members on a thesis panel, for example, chair, ordinary, and reserve.

paper name

Name of an examination paper.

parent and child relationship

A system record can be linked to other records in a one-to-one or one-to-many relationship. The records can be linked in a superior, or parent, or subordinate, or child, relationship to represent real-life structures. For example, a faculty consisting of several schools is represented as children schools of a parent faculty.

parent contribution

An estimate of the portion of a student's educational expenses that the Federal Government believes the student's parents can afford. Based on the parents' income, number of parents earning income, assets, family size, number of family members currently attending a university, and additional factors. Students who qualify as independent are not expected to receive a parent contribution.

parent organizational unit

Superior organizational unit.

parent unit set

Unit set that is in a superior relationship to another unit set. The parent unit set must be included as part of a student unit set attempt. It can have an open end date, if it is completed at the same time as the child unit set, or it can already be complete.

Parent Loan for Undergraduate Students

Federal loans available to parents of dependant undergraduate students to help finance the child's education. Parents can borrow up to the full cost of their children's education, less the amount of any additional financial aid received. PLUS loans can be used to pay the expected family contribution.

payment advice number

Identifies a student or sponsor's fee payment received through a bank.

payment due date

Date when payment of a fee liability, or partial payment, is due.

payment rank

Determines the order in which payment amounts received should be applied to a student's fee liabilities.

payment schedule

Template schedule from which payment due dates for a fee are derived.

PCL

See *primary care loan*.

Pell grant

Federal grant based on the student's financial need.

percentage

Percentage of credit to grant as unit advanced standing; percentage of load to attribute to a related calendar type.

percentage disbursement

See *disbursement percentage*.

percentage of program requirements granted

Total number of credit points of advanced standing granted divided by the number of credit points required for the program.

percent disbursement

When processing journals, determines the portion of calculated disbursement amounts available to budget centers at a point in time.

Perkins loan

Low interest rate loan awarded by the financial aid administrator to students with exceptional financial need. The student must apply for a Pell Grant to be eligible. Interest on the Perkins loan is subsidized while the student is in school. Formerly known as the National Direct Student Loan Program.

permanent resident code

Institution-defined code indicating a student's permanent residency status that must be mapped to a government permanent resident code.

permanent resident status

Codes indicating whether a student has permanent residency status.

person

Any individual recorded in Oracle Student System, whether a student, staff member, or other person, with a relationship to an institution.

person address

Address or addresses of a person recorded in the system.

person alias

Alternative names by which a person is known, such as maiden names.

person disability

Impairment or disability recorded for a person.

person doesn't exist

Electronic results upload configuration setting that defines the action taken by the system if a person recorded in the upload file does not exist in the system.

person international details

Details recorded for international students, including passport, visa, and citizenship details.

person note type

Institution-defined classification of notes pertaining to a person, for example, ACADEMIC, ADMIN, and DISCIPLINE.

person number

Number that identifies a person.

person number group

Group of persons with a common characteristic or characteristics.

person number group member

Person included in a *person number group*.

person number type

Identifies the system or organization to which an alternate person number belongs.

person type

System-defined classification of a person. A person can have multiple types. Examples are faculty, staff, and applicant.

perusal time

Amount of time for reading an exam paper prior to an examination.

PLAN

Test taken in the fall of the sophomore year in high school as practice for the ACT.

PLUS

See *parent loan for undergraduate students*.

planned calendar

Calendars still under development and not available for use by other subsystems.

practical unit

Specifies that a unit is classified as a practical experience unit, in which case the EFTSU value for the unit is generated by practical work experience.

pre-enroll units indicator

Specifies that student unit attempts for a program offering pattern should be pre-enrolled as part of pre-enrollment.

Preliminary Scholastic Assessment Test

Test taken during the junior year as practice for the scholastic assessment test. Scores on the PSAT are used to select semifinalists for the National Merit Scholarship program.

prepaid tuition plan

College savings plan guaranteed to rise in value at the same rate as college tuition fees. For example, if a family purchases shares that are worth half a year's tuition at a state college, they are always worth half a year's tuition, even if tuition rates have doubled 10 years later.

primary assessor

See Primary Assessor Indicator.

primary assessor indicator

Specifies that an assessor is the senior, or principal, assessor for an assessment item.

primary care loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS). Available to medical school students studying medicine, osteopathy, dentistry, veterinary medicine, optometry, and podiatry. Undergraduate pharmacology students are also eligible. To be eligible for this loan, a student must commit to working in the field of primary care. Previously known as the Health Professions Student Loan (HPSL).

primary set indicator

Indicates that a unit set is a primary set. Primary unit sets appear on official documents. A unit set ranked lower than another unit set that exists in a student unit set attempt and administrative unit sets cannot be set as primary sets.

principal

Sum of money borrowed or remaining unpaid on a loan. Interest is charged as a percentage of the principal. Insurance and origination fees are deducted from this amount before disbursement.

prior education

Statistical details related to a student's prior educational experience.

priority code - venue

Indicates an order of preference when allocating examinations to venues, with no associated system functionality.

private loans

Education loan programs established by private lenders to supplement the student and parent education loan programs available from federal and state governments.

processing year

Longest period of time when the processing of financial aid applications occurs for an academic year. Processing years can start 12 months in advance of an academic year.

professional degree

Degree awarded in a field such as law, education, medicine, pharmacy, or dentistry.

professional judgement

For need-based federal aid programs, the financial aid administrator can adjust the expected family contribution, adjust the cost of attendance, or change the dependency status when extenuating circumstances exist. For example, if a parent dies or if a parent becomes unemployed or disabled, the financial aid administrator can use estimated income information for the award year instead of the actual income figures from the base year. Delegation of authority from the Federal Government to the financial aid administrator is known as professional judgement.

program annual load

Number of credit points that constitute a full-time load for each year of a program version.

program annual load unit link

Linking unit versions to program annual loads to calculate Effective Full Time Student Units.

program attempt

See *student program attempt*.

program attempt contribution option

Option chosen by a student for the payment of his or her contribution liability for a program attempt.

program attempt status

Statuses derived by the system based on a student's enrollment, including Enrolled, Lapsed, Inactive, and Discontinued.

program category

Institution-defined classification of programs enabling inquiry, reporting, and manipulation of programs grouped together.

program code

Identifies a program.

program fee trigger

Program code indicating that students in that program are to be assessed for a fee.

program group

Collection of programs with common institution-defined properties.

program group code

Identifies a program group.

program grouped

Indicates if a unit is program grouped.

program group fee trigger

Program group code indicating that students in those programs are to be assessed a fee.

program group member

Program version that belongs to a program group.

program group type

Classification assigned to program groups to further define them, for example, program equivalent and common entrance requirements. Each program group must be mapped to a system program group type.

program note type

Defines the purpose of a note related to a program. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's official handbook.

program of study

The course that a student is studying.

program offering

Association of a program version with a calendar type. An association with a different calendar type constitutes a new program offering.

program offering instance

Specific time when a program is offered, defined by the calendar instance when the program version is offered.

program status

Specifies the status of activity, or availability, of a program version.

program type

Institution-defined classification of higher education programs, such as higher doctorate, diploma, and non-award program.

program type - basis details

Program type of a program forming the basis of a unit advanced standing.

program type fee trigger

Program type code indicating that students in programs of that type are to be assessed a fee.

program type group

Institution-defined collection of program types for estimating census date enrollment statistics, for example, higher degree by research and other postgraduate.

program type group code

Identifies a program type group.

program type restrictions

Restrict admission categories to particular program types.

program version reference

Identifies the program version to which a correspondence item is related.

provisional indicator

Specifies that a student's admission and enrollment in a program is pending permanent arrangements. The indicator must be selected manually.

promissory note

Binding legal document signed by the student borrower before loan funds are disbursed by the lender. States terms and conditions of the loan, including repayment schedule, interest rate, deferment policy, and cancellations.

PSAT

See preliminary scholastic assessment test.

publish outcomes indicator

Indicates if a student should have assessment results published. The default is yes.

qualification recency - advanced standing

Number of years during which other studies are recognized for granting advanced standing in a program.

quantity per student - supplied exam materials

Indicates the quantity of an exam material type to supply to each student for an examination.

question or title - assessment item

Question or title of a non-examinable assessment item.

range number

Number assigned by the system to an element range.

rank - unit sets

Describes the relative position of a unit set category to other categories, for example, a major has a higher rank than a minor.

rate

See *charge rate*.

rate number

Number assigned by the system to a fee assessment rate.

rating scale

Identifies the type of scale of values used to rate admission applications.

RA

See *research assistantship*.

reaching school

A student's preferred school, but the school is not obliged to admit the student. See safety school.

renewable scholarship

Scholarship awarded for more than one year. Usually, the student must maintain certain academic standards to be eligible for subsequent years of the award. Some renewable scholarships require the student to reapply for the scholarship each year; others require a report on the student's progress.

rating value

User-defined value used to rate admission applications.

re-admission

Process by which a person seeks to re-enter a program in which he or she was previously enrolled.

recipient

Registration ID and name of the person to whom a tracking item is sent for a particular step.

recommendation summary

Text field for entering a summary of an assessor's comments regarding the assessment or thesis result he or she recommends.

recommended panel size

Indicates the recommended number of members for a thesis panel.

recommended result

Recommended assessment or thesis result submitted by an assessor.

reference code

Reference code for a unit from an external system. For example, a voice response code.

reference code type

Classification of unit reference codes from external systems.

reference - unit assessment item

Identifying code, including numbers or other characters, of a unit assignment, examination, or other assessment item.

refunds

See *retention schedule*.

rejected applicant

Applicant who has not met requirements for admission.

repayment schedule

Provides details of the monthly payment, interest rate, total repayment obligation, payment due dates, and term of the loan.

repayment term

Period during which the borrower is required to make payments on outstanding loans. Usually indicated as a number of payments or years when the payments are made monthly.

repeatable indicator

Indicates if a student can repeat a unit he or she already passed for additional credit toward program requirements.

research assistantship

Financial aid awarded to graduate students to help support their education. Research assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. The research assistant is required to perform research duties.

research indicator

Specifies that a unit is classified as a research unit.

research percentage - attendance type

Describes the attendance percentage allocated to an attendance type for research students, for example, Full-time, or 100% and part-time, or 50%.

research supervisor

Institution-defined status applied to an individual responsible for reviewing a research project.

research supervisor - principal indicator

Indicates that a research supervisor type represents the lead or most significant supervisor for a research project.

research supervisor type

See *supervisor type*.

research topic

Broad subject to be researched by a research student, and a required field in a research candidacy record. More detailed information is recorded with the thesis details.

reserved enrollment

Subset of the enrollment quota that is currently reserved.

resolved indicator - non-enrolled outcomes

Specifies that an non-enrolled outcome has been resolved.

responsible organizational unit

Organizational unit responsible for a program version or unit set.

restrict - funding source

Indicates if students enrolling in a program are restricted to funding sources appearing in this set.

result

Grade or mark for a student unit attempt assessment item. Also known as outcome. See also *system result type*.

result type

Classification of assessment outcomes or grades.

retention schedule

Template schedule from which dates can be derived after which the institution retains all or a portion of an amount assessed for a fee, in the event that a student's liability reduces after reassessment. Amounts paid and not retained are available for refund.

retroactive date

Date up to which fee assessment can be run with a retroactive effective date.

returning student

Student enrolled in a program for the first time after the commence cutoff date alias has been reached.

review date - program version

Date when a program version is due for review. No automatic closure or rollover is implied by this date.

review date - unit sets

Date when a unit set version is due for review.

review date - unit version

Date when a version of a unit is due for review.

rollover destination calendar instance

Fee period into which a fee structure is to be rolled.

rollover source calendar instance

Fee period from which a fee structure is to be rolled.

route b

A method by which applications are processed by UCAS. Route B applications are processed in sequential order by institutions, only when one institution has rejected an application is it passed to the next institution. The default method is to process applications in parallel, with all applications made by an applicant being sent to institutions at the same time.

rule check indicator

Indicates if the system is responsible for rules relating to a student program attempt. If a student will no longer be checked successfully by the system, selecting No causes the student to be checked manually.

rule description

Name of a disbursement rule.

rule sequence number

Identifies rule to be used in fee assessment.

rule text

Defines the operation of a disbursement rule.

SAT

See *scholastic assessment test*.

sldd

See *Student with Learning Difficulties or Disabilities*.

safety net for upfront payment

Indicates if a student who has selected the up-front payment option has opted for the safety net, in which the institution changes the up-front option to the deferred option if the student cannot make the up-front payment by the due date.

safety school

A school that most certainly admits the student. See reaching school.

satisfactory academic progress

A student is required to continue making progress to receive federal aid. If a student fails to maintain an academic standing consistent with the school's SAP policy, the school's graduation requirements are unlikely to be met.

scheduled indicator - assessment item

Indicates if an examinable assessment item is included in an examination timetable.

Sallie Mae

Largest secondary market holding approximately one third of all educational loans. Formerly known as the Student Loan Marketing Association (SLMA).

schedules

See *Encumbrance schedule*, *payment schedule*, and *retention schedule*.

scholastic assessment test

One of two national standardized college entrance examinations used in the U.S. The other is the American College Testing Program. The SAT, previously known as the Scholastic Aptitude Test, is administered by the Educational Testing Service (ETS). Most universities require either ACT or SAT as part of an admission application. See *american college testing program*.

scholarship

Type of financial aid given to undergraduate students to help pay for their education. Most scholarships are restricted to paying all or part of tuition expenses. Scholarships are a form of gift aid and are not repaid. Many scholarships are restricted to students in specific programs of study or with academic, athletic, or artistic talent.

scholarships - conditions

Describes conditions that must be met to retain a scholarship.

scholarships - dollar value

Describes the dollar value of a monetary scholarship.

scholarships - other benefits

Describes any other benefits of a scholarship.

scholarship search service

Service that charges a fee to compare the student's profile against a database of scholarship programs.

scholarship type

Classification of scholarships that must be mapped to an organization unit or to a person number.

scholarship type code

Institution-defined code to identify scholarship types.

school code

Code that identifies a secondary education school.

school type

System-defined classification of secondary education schools, for examples, STATE, INDEPEND, and OTHER.

secondary market

Organization buying loans from lenders, providing the lender with capital to issue new loans. Selling loans is a common practice among lenders, and the bank a student makes payments to can change during the life of the loan. The terms and conditions of a loan do not change when it is sold to another holder. Sallie Mae is the nation's largest secondary market and holds approximately one third of all educational loans.

second percentage

Used when a teaching calendar is related a second time to a load calendar instance.

selection criteria - thesis panel type

Describes selection criteria for members of an examination panel, including required qualifications and years of experience.

selective service

Registration for the military draft. Male students who are U.S. citizens and have reached the age of 18 and were born after December 31, 1959 must be registered with Selective Service to be eligible for federal financial aid. If the student did not register and is older than 25, and the school determines that the failure to register was knowing and willful, the student is ineligible for all federal student financial aid programs. The school's decision as to whether the failure to register was willful is not subject to appeal.

self-help aid

Financial aid in the form of loans and student employment. If a financial aid package is required to include a minimum amount of self-help aid before any gift aid is granted, that level is known as the self-help level.

self help group indicator

Specifies that a student wants to participate in a self-help group for an enrolled program attempt.

Service Academy

U.S. Air Force Academy, U.S. Coast Guard Academy, U.S. Merchant Marine Academy, U.S. Military Academy, and U.S. Naval Academy. Admission is highly

selective as students must be nominated by their Congressional Representative in order to apply.

servicer

Organization collecting loan payments and performing additional administrative tasks associated with maintaining a loan portfolio. Loan servicers disburse loans funds, monitor loans while the borrowers are in school, collect payments, process deferments and forbearances, respond to borrower inquiries, ensure that the loans are administered in compliance with federal regulations, and guarantee agency requirements.

sequential indicator

Determines if an item's tracking steps must be completed in sequence and if calculated action dates for steps are progressive.

session

Each use of Oracle Student System, from logging on to logging off.

session date

Date when an examination session is held.

session number

Identifies a session within a selected examination calendar.

sessions at institution - exam supervisors

Number of examination sessions a supervisor has supervised at the home institution used to indicate a supervisor's level of experience.

sessions at other institutions - exam supervisors

Number of examination sessions a supervisor has supervised at other institutions, used to indicate a supervisor's level of experience.

secured loan

Loan backed by collateral. If a student fails to repay the loan, the lender can seize the collateral and sell it to repay the loan. Auto loans and home mortgages are examples of secured loans. Educational loans are generally not secured.

simple interest

Interest paid only on the principal balance of the loan and not on any accrued interest. Most federal student loan programs offer simple interest. Capitalizing interest on an unsubsidized Stafford loan is a form of compounded interest.

simplified needs test

The federal methodology ignores assets when calculating the expected family contribution. If parents have an adjusted gross income of less than \$50,000 and if every family member is eligible to file an IRS Form 1040A or 1040EZ or does not need to file a federal income tax return and if a student filed a 1040 but was not required to do so, then that student can be eligible for the simplified needs test.

SLMA

See *sallie mae*.

short paper name

See *paper name*.

show on official notification indicator

Specifies that unit sets or unit attempts with a particular administrative unit status are shown on official documents, such as academic transcripts and diplomas. For academic unit sets, the default setting is select. For administrative unit sets, the default setting is deselect.

social work admission service

A central agency acting on behalf of universities and colleges of higher education to process applications to post-graduate social work diploma courses. This service is provided for SWAS as one of the small systems operated by UCAS.

sought outcome indicator - special consideration

Specifies that a special consideration outcome is included in the list of available sought outcomes.

sought outcome - special consideration

Special consideration outcome that a student identifies as the desired result of his or her application.

source categories

Source categories are logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. They are

also used to build self service application types and to declare elements as mandatory.

special award

Award other than a program or honorary award, including prizes and medals. Special awards can be announced at graduation ceremonies.

special consideration category

Identifies the basis for a special consideration application.

special consideration outcome

Result of a special consideration application.

special grade type

System-generated classifications that identify students requiring deferred, special, or supplementary examinations, and grades that can be overwritten during the electronic results upload process.

sponsor code

Identifies a person or organization acting as a sponsor for a student.

sponsorship

Arrangement in which a person or organization pays student fees in full or in part.

sponsorship limit

Amount that a sponsor does not exceed when paying a student's fees.

sponsor status

Code indicating the standing of a sponsor within an institution that maps to a system sponsor status.

sponsor type

Classification of sponsors, for example, CORPORATE and FACULTY.

SSIG

See *state student incentive grants*.

Stafford loans

Subsidized and unsubsidized federal loans. Subsidized loans are based on need; unsubsidized loans are not. Interest on subsidized Stafford loans is paid by the Federal Government while the student is in school and during the six month grace period. Subsidized Stafford loans were previously called Guaranteed Student Loans (GSL). Unsubsidized Stafford loans can be used to pay the expected family contribution.

standard annual load

Describes the load, in credit points, that a full-time student normally studies in a year if enrolled in a program, and used to calculate the relative weighting of units.

standard full time completion time

A government code that indicates the standard time to complete the requirements of a program on a full-time basis. For example, 30 equals 3 years.

standard part time completion time

A government code that indicates the standard time to complete the requirements of a program on a part-time basis. For example, 60 equals 6 years.

statement of educational purpose

A legal document that the student agrees to use financial aid for educational expenses only. Students must sign this document before receiving federal need-based aid.

student aid report

Summarizes information included in the Free Application for Federal Students Aid (FAFSA) and must be provided to a school's financial aid office. The SAR also indicates the amount of Pell Grant eligibility, if any, and the expected family contribution. Students receive a copy of the SAR four to six weeks after filing a FAFSA.

start date alias - fee assessment processing

First date when an effective date for fee assessment processing can be set.

start date of calendar instance

Date when a calendar instance becomes effective.

start date - fee period

First date of a fee period.

start date - grading schema

First date of a grading schema version.

start date - institution address, location address, organizational address

Date when an address for an institution, location, or organizational unit becomes effective.

start date - organizational unit

Date when an organizational unit becomes effective. An organizational unit is identified by its code and start date.

start date - person statistics

Date when a student's statistical information is effective.

start date - program offering instance

Date when a program offering instance becomes effective.

start date - program version

Date when a program version becomes effective.

start date of tracking item

System-generated date when an item is initiated which cannot be altered.

start date - unit sets

Date when a unit set version becomes effective.

start date - unit version

Date when a unit version becomes effective.

start time - exam session

Time an examination session commences.

start time - unit class

Time a unit class commences.

state student incentive grants

State-run financial aid program for state residents. States receive equal funds from the Federal Government to help them fund the program.

statement of account

Used for the invoice sent to students or sponsors after fee assessment.

status of a thesis

System-generated status indicating the progress of a thesis, including PENDING, SUBMITTED, EXAMINED, and DELETED.

step

See *admission step, enrollment step, tracking step, tracking type step.*

step complete indicator

Set by a step's recipient or a tracking item's originator when a step has been completed.

step group type

System-defined classification of admission, enrollment, research, or tracking steps according to their relation to students, programs, or units.

step order

Sequence in which admission, enrollment, research, or tracking steps are performed. The step order does not apply to certain step group types.

step type

System-defined step in the admission, enrollment, research, or tracking processes.

student accounts office

See bursars office.

student contribution

Sum of money the Federal Government expects students to contribute to their education and included as part of the expected family contribution. Standard contributions depend on the student's income and assets but can vary from school to school.

student commencement type

Describes the relationship between a group of students and an institution at enrollment, and used to define enrollment procedure details and steps for each group of students. Student groups are NEW, commencing a program; RETURN,

continuing in an enrolled program attempt; or ALL, both new and returning students.

student program attempt

Enrollment of a student in a particular program offering option.

student loan marketing association

See *sallie mae*.

student return

HESA-defined return based on a student's total program of study leading to a qualification. It involves the completion of a single record for each student, setting out the student-related and programme-related data, including the modules the student studied.

student unit set attempt hesa details

Captures the student year of program enrollment data required by HESA that is not captured in the core student system.

student unit attempt

Enrollment of a student in a particular unit offering pattern.

student unit attempt assessment item

See *assessment item*.

student target

Numeric range for goal of admission of applicants with certain characteristics to programs of study. Targets can be defined for organization units, by funding source, by program offering pattern, by unit set, by program type, program attendance mode, and by unit internal program level.

student with learning difficulties or disabilities

Classifies programs provided only for students with learning difficulties and disabilities or provided as a result of an assessment that identifies if a student has learning difficulties or disabilities.

supplemental loan for students

Federal loans for financially independent students. This program was discontinued in 1994 with the introduction of unsubsidized Stafford loans program.

subsidized loan

The government pays interest on the loan, such as the Perkins loan or the subsidized Stafford loan, while the student is in school, during the six-month grace period and during any deferment periods. Subsidized loans are awarded based on financial need and might not be used to finance the family contribution. See *Stafford loans* and *unsubsidized loan*.

sublocation

Subordinate location in a location relationship. For example, a campus location is a sublocation of the university location. A location can have multiple sublocations. See also *parent and child relationship*.

submission date - expected

Date specified by the candidate when he or she expects to submit a thesis for examination.

submission date - last

Date when a thesis is submitted for examination.

subordinate calendars

See *calendar instance relationship*.

subordinate unit

Sub unit to a superior unit.

subordinate unit version

Sub unit version to a superior unit version.

successful applicant

Applicant eligible to receive an offer.

superior calendars

See *calendar instance relationship*.

superior unit

Unit with subunits.

superior unit version

Unit version with subunit versions.

supervision - end date

Date when a supervisor's service for a research candidacy ends.

supervision - funding percentage

Percentage of a research load apportioned for funding purposes to a specified organizational unit.

supervision - organization unit

Organizational unit a supervisor works for when serving as supervisor.

supervision percentage

Percentage of supervision undertaken by a supervisor, used to calculate the research load incurred by supervisors within an institution.

supervision - profession

Supervisor's profession.

supervision - replaced person number

Person number of a replaced supervisor for the supervision history for a research candidacy.

supervision - start date

Date when a supervisor becomes effective for a research candidacy.

supervisor instructions

Special instructions for supervisors administering an examination.

supervisor limit

Maximum number of supervisors typically allocated to a venue.

supervisor type

Institution-defined classification of supervisors for assessment or research.

supplementary assessment

Additional assessment item given to a student because the student failed during the normal assessment period. Supplementary assessment is typically the outcome of a special consideration application.

supplementary examination

Additional examination given to a student because the student failed during the normal assessment period.

supplementary examinations permitted

Indicates if supplementary examinations or other assessment can be undertaken by students enrolled in a program.

supplied materials - examination

Materials supplied to students for an examination.

supplemental education opportunity grants

Federal grant program for undergraduate students with exceptional need. SEOG grants are awarded by the school's financial aid office. To qualify, a student must also be a recipient of a Pell Grant.

system admission application status

System-defined status to which an institution-defined admission application status is mapped, including RECEIVED, COMPLETED, and WITHDRAWN.

system admission conditional offer status

System-defined status to which an institution-defined admission conditional offer status is mapped, including PENDING, SATISFIED, and WAIVED.

system admission documentation status

System-defined status to which an institution-defined admission documentation status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

system admission entry qualification status

System-defined status to which an institution-defined admission entry qualification status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

system admission fee status

System-defined status to which an institution-defined admission fee status is mapped, including EXEMPT, ASSESSED, and RECEIVED.

system admission offer deferment status

System-defined status to which an institution-defined admission offer deferment status is mapped, including PENDING, APPROVED, and REJECTED.

system admission offer response status

System-defined status to which an institution-defined admission offer response status is mapped, including PENDING, ACCEPTED, and LAPSED.

system admission outcome status

System-defined status to which an institution-defined admission outcome status is mapped, including PENDING, OFFER, and COND-OFFER.

system admission process type

System-defined classification of the processes available for direct admission, for example, re-admission and program transfer.

system admission unit outcome status

System-defined status to which an institution-defined admission unit outcome status is mapped, including OFFERED and REJECTED.

system amount type

Indicates how an intake target type is measured, including EFTSU, PERCENTAGE, PERSON, and WEFTSU.

system assessment type

System-defined classification of assessment types to which an institution-defined assessment type can be mapped, including ASSIGNMENT and NONCENTRAL.

system assigned indicator - grading schema

Specifies that a grade can only be assigned by system processes.

system calendar status

System-defined reference data assigned to a calendar status defined by an institution to indicate if a calendar is planned, active, or inactive.

system charge method type

See *charge method*.

system contribution payment type

System-defined classification of contribution payment types to which a government contribution payment option maps, that allows the system to determine how a student discharges a contribution liability.

system default indicator

The default institution-defined status if more than one is mapped to a system-defined status.

system fee hold status

System-defined status to which an institution-defined fee encumbrance status is mapped, including WAIT APRVL, APPLIED, and CANCELLED.

system fee sponsorship status

System-defined status to which an institution-defined fee sponsorship status is mapped, including ACTIVE, EXPIRED, and CANCELLED.

system fee structure status

System-defined status to which an institution-defined fee structure status is mapped, including ACTIVE, INACTIVE, and PLANNED.

system fee trigger category

Restricts triggers that can be applied to a fee liability of a particular fee type, including INSTITUTN, for institution-wide fees with no triggers attached to fee liability, and COURSE.

system fee type

System-defined classification of fee types, for example, CONTRIBUTION, TUITION, and OTHER. CONTRIBUTION and TUITION fee types can be reported to the government.

system generated indicator

Indicates if an inquiry package is produced by the system.

system hold effect type

Describes the effect of placing a hold on a student or a student program attempt.

system inquiry status

System-defined status to which an institution-defined inquiry status is mapped.

system institution status

System-defined status that defines an institution's level of activity and to which an institution-defined institution status is mapped, including INACTIVE or ACTIVE.

system intake target type

System-defined classification of intake target types, for example, COMMENCEMENT, RETURNING, TOTAL, and USER-DEFINED.

system location type

System-defined classification of locations used to determine associated functionality. Location type can be mapped to system location types.

system organizational status

System-defined status that defines an organizational unit's level of activity and enables functionality, and to which an institution-defined organizational unit status is mapped, including ACTIVE or INACTIVE.

system person ID type

System-defined classification of person ID types that has associated functionality. Institution-defined person ID types are mapped to system person ID types and inherit the associated functionality.

system program group type

System-defined classification of program groups. Each program group must be assigned a program group type. Examples include equivalents and common entrance requirements.

system program status

System-defined status that indicates the level of program activity of a program version. A program is established with a status of PLANNED. For students to be enrolled in the program, it must have a status of ACTIVE.

system reference code type

System-defined classification of reference code types that defines the use of a program entry point reference code.

system result type

System-defined classification of result types, including PASS, FAIL, INCOMPLETE, and WITHDRAWN.

system sponsor status

System-defined status to which an institution-defined sponsor status is mapped, including ACTIVE and CANCELLED.

system tracking status

System-defined status, including ACTIVE, CANCELLED, and COMPLETE.

system tracking type

System-defined classification of tracking types associated with specific functionality. Each institution-defined tracking type is mapped to a system tracking type.

system unit mode

System-defined mode of offering a unit, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on-campus and off-campus.

system unit status

System-defined unit status to which an institution-defined unit status is mapped, including PLANNED, ACTIVE, and INACTIVE.

swas

See *Social Work Admission Service*.

TA

See *teaching assistantship*.

target

Minimum target to be reached.

teaching assistantship

Financial aid awarded to graduate students to help support their education. Teaching assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. A TA is required to perform teaching-related duties.

target days

Indicates maximum number of days a tracking item of a particular type takes to complete, used by the system with the business-days-only indicator to calculate the completion-required-by date for an item.

term

Number of months or years during which the loan is to be repaid. See term.

tax file number invalid date

Date an institution is notified that a student supplies an invalid tax file number.

Test of English as a Foreign Language

Most colleges and universities require international students to take the TOEFL as part of the admission application. TOEFL evaluates a student's ability to communicate in and understand English.

tax file number recorded date

Date when a student's tax file number is recorded in the system.

teaching period code

Code used for extracting academic results for export, which is mapped to institution-defined teaching calendars.

teaching responsibility

Percentage allocation of teaching responsibility to an organizational unit for a unit of study.

testamur

Official printed document indicating the conferral of an award.

testamur type

Classification of testamurs based on their content and layout. Each testamur type must be mapped to a correspondence type to record the mailing of testamurs.

test run

Parameter enabling the fee assessment routine, when initiated from the Fee Assessment Routine and Trace job, to run without updating the database while still supplying a report of the processing decisions.

thesis examination type

Institution-defined classification of thesis types, for example, written, performance, and oral.

thesis format

Text field to record the format of a thesis.

thesis panel

Administers thesis examinations.

thesis panel type

Institution-defined classification of thesis panel types.

thesis result

Assessment outcome or grade of a thesis.

thesis result code

Institution-defined code that must be mapped to a system thesis result code. System thesis result codes include the final results: FAIL, FAIL-ALT, NO RESULT, and PASS, and codes for incomplete, or interim, results: MINOR-REV and REV-MAJOR. Incomplete results can be recorded for a thesis examination, but not a thesis.

thesis result - thesis examination

Assessment outcome or grade of a thesis examination resulting from panel member recommendations.

thesis topic

Text field containing the topic of a thesis.

three way mapping associations

A mapping defined in the Maintain HESA Code Mappings window between a UCAS reference code, an OSS code and a HESA code.

time limitation

Maximum number of years students have to complete a program offering option.

times keyed

Number of times an outcome has been entered.

title

Full title of a research student's thesis.

Title IV loans

Title IV of the Higher Education Act of 1965 created several education loan programs, collectively referred to as the Federal Family Education Loan Program

(FFELP). These loans, also called Title IV loans, are subsidized and unsubsidized Federal Stafford loans, Federal PLUS loans, and Federal consolidation loans.

Title IV school code

Required for completion of the Free Application for Federal Student Aid. This code is a six-character identifier starting with one of the following letters: O, G, B, or E.

TOEFL

See test of english as a foreign language.

total credit points approved

Total credit points approved as advanced standing.

total credit points granted

Total credit points granted as advanced standing.

tracking group ID

Institution-defined code identifying a group of tracking items.

tracking group status

System-derived status indicating a tracking group's progress, including ACTIVE, if any tracking items are active and COMPLETE, if all tracking items are complete or cancelled.

tracking ID

See Tracking Item ID.

tracking item

Document or process monitored by the Tracking subsystem.

tracking item group membership

Membership of a tracking item in a tracking group or groups.

tracking item ID

System-generated identification number of a tracking item.

tracking item originator

Name and identification number for a person who created a tracking item.

tracking item subject

Name and identification number for a person who is the subject of a tracking item, typically, a student.

tracking note type

Classification of tracking notes.

tracking status

Institution-defined status of a tracking item mapped to a system tracking status.

tracking step

Activity required to process a tracking item, identified by a system-generated number representing the order the step is completed if the Sequential indicator is set.

tracking step group type

See *step group type*.

tracking step order

See *step order*.

tracking type

Institution-defined classification of tracking items that map to system-defined tracking types, including ASSESSMENT, MANUAL ADJ, PAYMENT, and RETENTION.

tracking type step

Identified by a system-generated number and used as a default activity in the processing of a tracking item of the same type.

transaction

Positive or negative amount that a student pays or owes.

trigger

Program, group of programs, unit, unit set, or trigger group recorded for a fee liability matched against a student's program, unit attempts, or unit set to determine if the student is liable for a particular fee. See also *program fee trigger*, *program group fee trigger*, *program type fee trigger*, *unit trigger*, *unit set trigger*, and *trigger group*.

trigger group

Group consisting of program, unit, and unit set triggers and acting as a single trigger.

two way mapping associations

A mapping defined in the Maintain HESA Code Mappings window between either a UCAS reference code and an OSS code or between an OSS code and a HESA code.

ucas

See *University and Colleges Admissions Service*.

ucas tariff

A points score system devised by UCAS for entry to higher education institutions from 2002. Calculated from the entrance qualifications achieved by the applicant.

uk statistics student program attempt record

Captures the student program enrollment data required for reporting to HESA but not captured in the core student system.

unconditional offer

Standard offer of admission to a program, including details of any advanced standing offered.

unearned income

Interest income, dividend income, and capital gains.

unit assessment item

See *assessment item*.

unit attempts

See *student unit attempt*.

unit attempt status

System-defined status of a unit attempt.

unit-based approach

A method of calculating student full time equivalence based on the number of credit points that the student is enrolled in.

unit category

Grouping of units with a common characteristic or characteristics.

unit class

Class in which a unit is taught.

unit code

Identifies a unit.

unit deletion cut-off date alias

If advanced standing is granted on or before this date, an enrolled student unit attempt, linked to a teaching period, can be deleted.

unit discontinued

Electronic results upload configuration setting that defines the action taken by the system when a unit attempt recorded in the upload file is discontinued.

unit grading schema precedence indicator

Indicates if grading schema attached to a unit offering option takes precedence over grading schema attached to an enrolled student's program offering.

unit internal program level

Internal program level grouping of a unit for calculation of weighted effective full time student units.

unit level

Level of a unit in a normal year.

unit mode

Means by which a unit can be studied. Each institution-defined unit mode must map to a system-defined unit mode, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on-campus and off-campus.

unit not enrolled

Electronic results upload configuration setting that defines the action taken by the system when a student is not enrolled in a unit recorded in the upload file.

unit offering

Availability of a unit version to students specified by naming the teaching calendar in which a unit is to be offered.

unit offering pattern

Availability of a unit version in terms of attendance mode and type.

unit placement

Recommendation for placement in a particular unit, based upon an applicant's admission test score results.

university and colleges admissions service

UCAS is an organization in the United Kingdom providing a centralized admissions service to instructions for full-time undergraduate courses, Higher National Diplomas (HND), and university diplomas.

unsecured loan

Loan not backed by collateral, representing a greater risk to the lender. The lender can require a cosigner on the loan to reduce risk. If a borrower defaults on the loan, the cosigner is held responsible for repayment. Most educational loans are unsecured loans. In the case of federal student loans, the federal government guarantees repayment of the loans.

unit set

Group of units or rules with a common characteristic or characteristics, including MAJOR, MINOR, STRAND, and STREAM.

unit set category

Institution-defined grouping of unit sets, or code representing this grouping, including MAJOR, MINOR, STRAND, and STREAM.

unit set code

Identifies a unit set.

unit set group

Subdivision of a program award. Allows a program award to be split across ceremonies and graduands to be presented in order within their unit set group.

unit set status

Institution-defined status attributed to a unit version to define its currency in the system, and mapped to a system unit set status.

unit set trigger

Unit set code indicating that students in that unit set are to be assessed a fee.

unit set version

Only one version of a unit set with a status of ACTIVE and an unset expiry date can exist in the system.

unit set version number

Identifies a version of a unit set.

unit status

Indicates the level of activity of a unit, for example, CURRENT and SUSPENDED.

unmet need

Due to budget constraints, the financial aid officer can provide the student with less than the student's need. This gap is known as the unmet need. See need.

unsubsidized loan

Interest is not paid by the government on unsubsidized loans. The borrower is responsible for interest on an unsubsidized loan from the date the loan is disbursed, even while the student is in school. Students can avoid paying interest while they are in school by capitalizing the interest that increases the loan amount. Unsubsidized loans are not based on financial need and can be used to finance the family contribution. See *Stafford loans* and *subsidized loan*.

unmet need

Due to budget constraints, the financial aid officer can provide the student with less than the student's need. This gap is known as the unmet need. See need.

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Interest is not paid by the government on unsubsidized loans. The borrower is responsible for interest on an unsubsidized loan from the date the loan is disbursed, even while the student is in school. Students can avoid paying interest while they are in school by capitalizing the interest that increases the loan amount. Unsubsidized loans are not based on financial need and can be used to finance the family contribution. See *Stafford loans* and *subsidized loan*.

unit trigger

Unit code indicating that students in that unit are to be assessed a fee.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

unit version reference

Identifies the unit version to which a correspondence item is related.

unsecured loan

Loan not backed by collateral, representing a greater risk to the lender. The lender can require a cosigner on the loan to reduce risk. If a borrower defaults on the loan, the cosigner is held responsible for repayment. Most educational loans are unsecured loans. In the case of federal student loans, the federal government guarantees repayment of the loans.

unsuccessful applicant

Applicant who has met the requirements for admission but is not offered admission because of quota restrictions or other reasons.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

upfront payment option

See government contribution payment option.

upper load limit

Upper load value of the enrollment load range, in credit points, that defines a student's attendance type in an academic period.

upper range

See element range.

U.S. Department of Education

Government agency administering several federal student financial aid programs, including federal Pell Grants, Federal Work-Study Programs, Federal Perkins loans, Federal Stafford loans, and Federal PLUS loans.

U.S. Department of Health and Human Services

Government agency administering several health education loan programs, including the Health Education Assistance Loan, Health Profession Student Loan, and Nursing Student Loan programs.

USED

See *U.S. Department of Education*.

variation cut-off date

Date when variations to enrollments can no longer be processed, except for users with a security role permitting access to the variation cut-off date override enrollment step.

variation cutoff date alias

Applies to assessment items. Used to warn against further variations in the unit assessment item in a teaching period.

variable interest

Interest rate that changes periodically.

venue

Place available for an examination session or site where a graduation ceremony takes place. Each graduation venue is associated with a parent graduation location.

venue code

Identifies a venue.

verification

Review process if the financial aid office determines the accuracy of information provided on the student's financial aid application. During the verification process, the student and parent are required to submit documentation for the amounts on the financial aid application. Examples include signed copies of the most recent federal and state income tax returns for the student, the student's spouse if applicable and the student's parents, proof of citizenship, proof of registration with Selective Service, and copies of Social Security benefit statements. Financial aid applications are randomly selected by the federal processor for verification, with most schools verifying at least one third of all applications. An asterisk next to the expected family contribution figure on a Student Aid Report (SAR) indicates that the SAR has been selected for verification. Schools might select additional students for verification if they suspect fraud. Some schools undergo 100% verification. If

any discrepancies are uncovered during verification, a student's final financial aid package might vary from the initial package described on the award letter received from the school. If a student refuses to submit the required documentation, the financial aid package is cancelled and no aid is awarded.

veteran

For federal financial aid purposes, such as determining dependency status, a veteran is a former member of the U.S. Armed Forces, for example, Army, Navy, Air Force, Marines, or Coast Guard, who served on active duty and was discharged dishonorably, that is received an honorable or medical discharge. A person is a veteran even if they serve one day on active duty and that does not include active duty for training, before receiving DD-214 and formal discharge papers. ROTC students, members of the National Guard, and most reservists are not considered veterans. Having a DD-214 does not necessarily mean that a student is a veteran for financial aid purposes.

version number - grading schema

System-generated number that identifies a version of grading schema.

visa type

Classification of visas for international applicants, students, staff, and faculty.

voice response available indicator

Specifies that a unit offering option is available for enrollment through voice response.

voluntary end indicator

Describes whether the ending of a unit set attempt is voluntary or the result of failure to progress or other administrative reason.

voluntary indicator - intermission

Indicates if an intermission of a student program attempt is initiated at a student's request.

W2 form

Form listing an employee's wages and taxes withheld. Employers are required by the IRS to issue a W2 form for each employee before February 28.

work study

See federal work study.

waive option check indicator

Indicates whether to waive checks applied by forced elements of a program offering option, including location, attendance mode, and attendance type.

waive rules

Turning off online unit rule checking function, allowing a student to enroll in a unit that goes against the rules.

waive rules date

Date when a rule applying to a unit attempt is waived.

waive rules person ID

Indicates a person who waives a rule applying to a unit attempt.

weighted average mark

A calculated value used to evaluate a student's progress in a program attempt.

weighted average mark weighting

Rules used to determine weighted average mark calculations.

weighted effective full time student units

Effective Full Time Student Units multiplied by discipline funding index multiplied by unit program level factor.

weighted effective full time student units factor

Factor associated with an internal program level grouping used to determine weighted effective full time student units.

working time

Amount of time a student has to complete an examination.

workload credit points - lab

Institutionally-defined instructional load calculation equivalent to the lab credit points.

workload credit points - lecture

Institutionally-defined instructional load calculation equivalent to the lecture credit points.

write off bad debt indicator

Indicates if debt is written off when a fee encumbrance is applied.

year of program

Programs of study within UK HE institutions are often structured as a number of years, with a student progressing from one year to the next. The years are referred to as year of programs. Within the Oracle Student System a year of program is implemented as a unit set attempt.

year - program annual load

Year to which an annual load figure applies.

Index

A

- academic statistics setup
 - overview
 - institution statistic types, 13-8
 - organizational unit statistic types, 13-10
 - student statistic types, 13-7
- account hierarchy
 - Account Hierarchy window
 - description, 18-17
 - example, 18-17
 - procedures
 - defining, 18-17
- achievable credit points
 - overview, 19-5
- administrative unit statuses
 - Administrative Unit Statuses Procedure window
 - description, 11-29
 - overview, 11-27
- Admission
 - procedures
 - setting up self service admission application types, 10-45, 10-47
- admission
 - Admission Period Calendars window
 - description, 10-53
 - procedures
 - creating admission period date overrides, 10-57
 - defining student targets by program and funding source, 10-16
 - mapping admission calendar configuration, 10-61
 - modifying admission calendars, 10-52
 - rolling over admission calendars, 10-55
 - setting up self service admission application types, 10-45, 10-47
 - setting up self service inquiry configuration, 9-9
 - admission calendar configuration
 - Admissions Calendar Configuration window
 - description, 10-62
 - admission calendar configurations
 - procedures
 - mapping admission calendar configuration, 10-61
 - admission calendar rollover report concurrent
 - process, E-13
 - admission calendars
 - modifying admission calendars, 10-52
 - rolling over admission calendars, 10-55
 - admission categories
 - Admission Categories window
 - description, 10-33
 - overview, 10-32
 - admission codes
 - Admission Codes window
 - description, 10-5
 - admission conditional offer statuses
 - Admission Conditional Offer Status window
 - description, 10-102
 - admission decision process
 - assigning evaluators and performing evaluations, 10-86, 10-89
 - manual assignment, 10-90
 - correspondence, 10-108
 - admission entry qualification statuses
 - Admission Entry Qualification Status window

- description, 10-97, 10-103, 10-105
- admission outcome statuses
 - Admission Outcome Status window
 - description, 10-101
- admission period date overrides
 - Admission Period Date Overrides window
 - description, 10-58
 - example, 10-58
 - procedures
 - creating admission period date overrides, 10-57
- admission process category details
 - Admission Process Category Detail window
 - description, 10-40
- admission process category tracking rules
 - Admission Process Category Tracking Rules window
 - description, 10-44
- admission test types
 - Admission Test Types window
 - description, 10-80
- admission unit outcome statuses
 - Admission Unit Outcome Status window
 - description, 10-98
- advanced standing configuration
 - Advanced Standing Configuration window
 - description, 12-5
- advanced standing process
 - advanced standing statuses, 12-3
 - advanced standing types, 12-2
- application completion statuses
 - Application Completion Statuses window
 - description, 10-100
- application entry process
 - admission process categories, 10-30
 - assigning admission process categories, 10-30
 - tracking missing items in applications, 10-31
 - application entry process, 10-29
- application hierarchies
 - Application Hierarchies window
 - description, 18-105
 - example, 18-105
 - procedures
 - defining, 18-105

- application processing
 - procedures
 - maintaining To Do list items, 20-10
 - setting up institutional application, 20-8
- application processing setups
 - Data Change Workflow Attribute window
 - description, 20-7
 - Financial Aid Attendance Types window
 - description, 20-22
 - Financial Aid Grade Level Mapping window
 - description, 20-32
 - example, 20-32
 - overview
 - batch year mappings, 20-3, 20-6
 - institutional application setup, 20-7
 - record matching criteria, 20-5
 - To Do lists, 20-10
 - procedures
 - maintaining To Do list items, 20-10
- application processing statuses
 - Application Processing Statuses window
 - description, 10-96
- application review profiles
 - Application Review Profile window
 - description, 10-85
 - Evaluator window
 - description, 10-91
 - Review Group window
 - description, 10-87
- application setups
 - overview
 - data change workflow attribute, 20-7
 - Financial Aid attendance types, 20-21
 - financial aid office, 20-1
 - procedures
 - setting up institutional application, 20-8
- apply unit set to program offerings
 - Apply Unit Set to Program Offerings window
 - description, 8-194
- approved assessment items grading schemas
 - Approved Assessment Item Grading Schemas window
 - description, 14-29
- assessment item examination materials
 - overview, 14-35

- assessment type government score mapping
 - Assessment Type Government Score Mapping window
 - description, 10-28
 - overview, 10-26
- assessments
 - Incomplete Grade Conversion System Profile
 - Configuration window
 - description, 14-61
 - procedures
 - creating examination supervisor
 - details, 12-5, 12-6, 14-61, 14-64, 14-71
 - entering unit assessment items, 14-45
 - setting up assessment calendars, 5-42
 - setting up examination calendars, 5-43
- assessments procedures
 - overview
 - supervisors to venue, 14-73
- assessments process
 - assessment items, 14-22
 - assessment patterns, 14-24
 - special consideration for students, 14-64
- Assessments setup
 - assessments calendars, 5-42
- attendance entry configurations
 - Attendance Entry Configuration window
 - description, 14-6
- attendance types
 - overview, 19-2
- award processing
 - procedures
 - maintaining fund manager, 20-37
- award setup
 - Fund Manager window
 - description, 20-37
 - procedures
 - rolling over fund attributes, 20-57
- awards
 - Awards window
 - description, 8-42
- awards - rollover fund attributes concurrent
 - process, E-11
- awards setup
 - overview
 - award groups, 20-54

- award revision reasons, 20-49
- cost of attendance items, 20-50
- external term mapping, 20-9
- fund calendar relations, 20-56
- fund code, 20-34
- fund manager, 20-35
- fund rollover process, 20-57
- fund term installments, 20-47
- fund type, 20-34

B

- balance rules
 - Balance Rules window
 - description, 18-107
 - example, 18-107
 - procedures
 - defining, 18-107
- basic program details
 - Basic Program Details window
 - description, 4-26, 7-8, 8-56
- basic unit details
 - Basic Unit Details window
 - description, 8-104
- basic unit set details
 - Basic Unit Set Details window
 - description, 8-188
- basis for admission type
 - overview, 10-2
- basis for admission types
 - Basis for Admission Types window
 - description, 10-3
- buildings
 - Buildings window
 - description, 6-42
 - overview, 6-41

C

- Calendar
 - procedures
 - creating calendar date alias instances, 5-30
 - setting up calendar instance
 - relationships, 5-17
- calendar

- procedures
 - creating date alias offset constraints, 5-28
- calendar categories, 5-4
- calendar date alias instances
 - Calendar Date Alias Instances window
 - example, 5-30
 - procedures
 - creating calendar date alias instances, 5-30
- calendar date alias instances
 - Calendar Date Alias Instances window
 - description, 5-30
- calendar date report concurrent process, E-3
- calendar instance date alias instance
 - overview, 5-30
- calendar instance relationships
 - Calendar Instance Relationships window
 - description, 5-18
 - example, 5-18
 - procedures
 - setting up calendar instance
 - relationships, 5-17
- calendar instance relationships, rollover
 - process, 5-10
- calendar instances, 5-4
 - overview, 5-7
- calendar process
 - calendar relationships
 - data dependencies, 5-3
 - terminology, 5-1
- calendar types
 - Calendars window
 - description, 5-8
- calendars
 - admission calendars, 5-36
- career process
 - career/program/unit relationship, 13-5
 - derivation, 8-5
 - institution attendance type, 8-6
 - primary program type, 8-5
 - program attempt status, 8-6
 - impact on other subsystems, 8-7
 - overview, 8-3
 - program transfer, 8-7
 - terminology, 8-4
- career program/unit relationship
 - Career Program/Unit Relationship window
 - description, 13-7
- catalog and schedule definitions
 - Catalog Definition window
 - description, 8-53
- catalog and schedule notes
 - Catalog Notes window
 - description, 8-55
- catalog rollover concurrent process, E-9
- categories, calendar, 5-4
- category procedure details
 - procedures
 - creating enrollment category procedure
 - details, 11-16
- class standing schedules
 - Class Standing Schedule window
 - description, 13-4
- class standings
 - Class Standing window
 - description, 13-3
- concurrent processes
 - admission calendar rollover report, E-13
 - awards - rollover fund attributes, E-11
 - calendar data report, E-3
 - catalog rollover, E-9
 - delete system log entries, E-6
 - import institutions, E-7
 - import institutions crosswalk, E-6
 - import institutions crosswalk error report, E-7
 - import process institution error report, E-8
 - monthly calendar report, E-4
 - organizational unit details report, E-5
 - parent-child organizational unit report, E-6
 - rollover admission period, E-12
 - rollover calendar report, E-4
 - rollover faculty's assignment, E-9
 - rollover program offering pattern, E-9
 - rollover unit offering options, E-10
 - schedule rollover, E-11
 - sponsor rollover, E-12
- configure repeat processing
 - procedures
 - configuring repeat processing, 11-53
- configuring research calendars and date aliases
 - overview, 5-38

- controlling progress through the graduation cycles
 - graduand status, approval status, and graduand type combinations, 16-5

- Correspondence

- correspondence process
 - documents, 24-2

- correspondence

- procedures
 - creating mapping and attributes, 24-6

- correspondence process

- correspondence placeholders, 24-2
 - documents, 24-2
 - master documents, 24-2

- correspondence setup

- overview
 - mapping and attributes, 24-5

- credential ratings

- Credential Ratings window
 - description, 10-68

- credential types

- Admission Credential Types window
 - description, 10-69
 - Credential Types window
 - description, 16-11

- credit type

- Credit Type
 - description, 18-104
 - procedures
 - defining, 18-104

- cross-listed units groups

- Cross-Listed Units Groups window
 - description, 8-230
 - example, 8-230
 - procedures
 - creating cross-listed units groups, 8-230

D

- date alias instance offset constraints

- Date Alias Instance Offset Constraints window
 - description, 5-34

- date alias instance pair

- Date Alias Instance Pair window
 - description, 5-32
 - example, 5-32

- date alias instances

- overview
 - date alias instance offset region, 5-29

- date alias offset

- overview, 5-25

- date alias offset constraints

- Date Alias Offset Constraints window
 - description, 5-28

- procedures

- creating date alias offset constraints, 5-28

- date alias pair

- overview, 5-25

- date aliases

- Date Aliases window
 - description, 5-26

- Default Basic Institution field, 12-4

- delete system log entries concurrent process, E-6

- Delivery Method Types window

- description, 17-2

- derived program attributes

- See program attributes, 18-35

- disbursement setup

- Pays Only Fee Classes window
 - description, 20-44
 - Pays Only Units window
 - description, 20-47

- To Do Items window

- description, 20-45

- disbursements setup

- Fund To Do Items window
 - description, 20-45

- disciplines

- Disciplines window
 - description, 8-50

- discontinuation reasons procedure

- Discontinuation Reasons window
 - description, 11-39

- discontinuation date offset deadline constraints

- overview, 11-36

- discontinuation date offset deadline constraints

- procedure
 - Discontinuation Date Offset Deadline Constraints window

- description, 11-26, 11-37

- Document Request Processing Setup window

description, 17-3

E

encumbrances, 8-182

enrolled credit points

overview, 19-5

enrollment calendar configuration

Enrollment Calendar Configuration window

description, 11-21

overview, 11-19

enrollment calendars

overview, 5-36

enrollment category details procedure

Enrollment Category Details Procedure window

description, 11-17

enrollment category mapping

Enrollment Category Mapping window

description, 10-37

enrollment category procedures

overview

enrollment category procedure details, 11-13

enrollment category procedure step, 11-14

enrollment category validation setup, 11-78

Enrollment Category Validation Setup window

description, 11-79

Enrollment category validation setup window

example, 11-79

enrollment date offset deadline constraints

overview, 11-25

enrollment deadline calculations procedure

Enrollment Deadline Calculations window

description, 11-41

enrollment note types procedure

Enrollment Note Types Procedure window

description, 11-11

Enrollments

procedures

setting up organizational unit waitlists, 11-68

Enrollments subsystem

procedures

creating enrollment category procedure

details, 11-16

examination sessions

Examination Sessions window

description, 14-72

examination supervisor details

Examination Supervisor Details window

description, 14-71

procedures

creating examination supervisor

details, 12-5, 12-6, 14-61, 14-64, 14-71

expected family contribution setup

Family Contribution Multiplication Factor

window

description, 20-4, 20-5, 20-8, 20-10

Expiry Date Increment field, 12-4

F

faculty

Degree Codes window

description, 8-22

Expected Workload Override Reasons window

description, 8-21

Expected Workload window

description, 8-20

Faculty Task Types window

description, 8-21

procedures

creating degree codes, 8-22

faculty setup process

overview

create and assign faculty task types, 8-19

create codes for multiple academic

degrees, 8-19

federal direct loans

overview, 20-23

federal direct PLUS loans

overview, 20-24

federal direct subsidized loans

overview, 20-23

federal direct unsubsidized loans

overview, 20-24

federal pell alternate schedule

Federal Pell Alternate Schedule window

description, 20-19

procedures

setting up federal pell alternate

schedule, 20-18, 20-30

- fee assessment rates
 - overview
 - level access, 18-48, 18-96
 - levels, 18-47, 18-96
 - multiple rates, 18-48, 18-97
 - reference, 18-97
- fee categories, institution, 18-40
- fee category calendar instance
 - Fee Category Calendar Instance window
 - description, 18-67
- fee category calendar instances
 - procedures
 - creating, 18-66
- fee category mapping
 - Fee Category Mapping window
 - description, 10-35
- fee liabilities, 18-38
- fee process
 - fee type rates, 18-32
 - triggers and fee liabilities, 18-38
- fee purpose
 - terminology, 18-1
- fee type rates, 18-32
- fee types, 18-32
 - Fee Types window
 - description, 18-45
- fees, program, 18-35
- fees, program attempt
 - multiple, 18-36
 - single, 18-35
- FFELP Setup
 - Overview, 20-28, 20-30
- fields of study
 - Fields of Study window
 - description, 8-34
- finance and late charge
 - Finance and Late Charge Plan window
 - description, 18-112
- financial aid office
 - window
 - description, 20-2
- Fund Academic Progress Outcomes
 - window
 - description, 20-37
- fund calendar relations

- Fund Calendar Relations window
 - description, 20-56
- fund code
 - Fund Code window
 - description, 20-35
- fund manager
 - procedures
 - maintaining fund manager, 20-37
- fund rollover
 - procedures
 - rolling over fund attributes, 20-57
 - Rollover Fund Attributes window
 - description, 20-58
 - example, 20-58
- Fund Term Installments
 - window
 - description, 20-56, 20-58

G

- government admission codes
 - Government Admission Codes window
 - description, 10-4
- government basis for admission types
 - Government Basis for Admission Type window
 - description, 10-2
- government contribution payments
 - overview, 11-5
- government discipline groups
 - Government Discipline Groups window
 - description, 8-13
- government levels of completion
 - Government Level of Completion window
 - description, 10-22
 - overview, 10-22
- government levels of qualification
 - Government Levels of Qualification window
 - description, 10-20
 - overview, 10-19
- government secondary assessment types
 - Government Secondary Assessment Types
 - window
 - description, 10-25
 - overview, 10-24
- government snapshot control

- Government Snapshot Control window
 - description, 11-47
 - overview, 11-46
- government socio-economic objective classifications
 - Government Socio-Economic Objective Classifications window
 - description, 19-18
- government type of activity classification codes
 - Government Type of Activity Classification Codes window
 - description, 19-20
- government type of activity codes
 - procedures
 - setting up, 19-20
- grade conversion
 - Grade Conversion window
 - description, 10-75
- grading process
 - anonymous grading process, anonymous
 - grading, 14-62
 - anonymous grading process, anonymous grading
 - configuraion, 14-62
 - grading schemas and grade rosters, grading
 - rosters, 14-11
- grading schemas process
 - overview
 - grading schemas and assessment item, 14-8
 - grading schemas and units, 14-8
 - grading schemas types, 14-8
- grading setup
 - mark and grade entry configuration, 14-55
 - repeat process configuration, 11-51
- gradings
 - procedures
 - configuring repeat processing, 11-53
 - maintaining mark/grade entry configuration
 - online keying
 - configuration, 14-56
- graduation ceremonies
 - Graduation Ceremony window
 - description, 16-15
- graduation note types
 - Graduation Note Types window
 - description, 16-13

- graduation procedures
 - overview
 - award ceremony, 16-18
 - graduation ceremony, 16-14
 - graduation ceremony notes, 16-17
 - unit set ceremony, 16-20
- graduation process
 - controlling progress through the graduation
 - cycles
 - graduand records, 16-4
- graduation setup
 - overview
 - credential types, 16-11
 - graduand approval statuses, 16-7
 - graduand status, 16-6
 - graduation note types, 16-13
 - honors levels and government honors
 - levels, 16-9
 - measurements, 16-12
- group rules
 - procedures
 - adding rules to rule groups and
 - subgroups, 23-4
- Guarantor Codes
 - Overview, 20-25

H

- History
 - procedures
 - entering concurrent process text, E-1
- hold details, 4-24
- hold effects, 4-23
- Hold Plans
 - Hold Plans window
 - description, 18-110
 - example, 18-110
- hold types, 4-23
- holds
 - procedures
 - placing, 18-110
- holds process
 - defining holds, 18-108
 - holds plan, 18-108
 - hold types, 18-109

- holds threshold amount, 18-108
 - holds
 - threshold percentage, 18-109
- holds setup
 - prerequisites, 18-109

I

- import institutions concurrent process, E-7
- import institutions crosswalk concurrent process, E-6
- import institutions crosswalk error report concurrent process, E-7
- import process institution error report concurrent process, E-8
- inquiry characteristic types
 - Inquiry Characteristic Types window
 - description, 9-16
- inquiry entry levels
 - Inquiry Entry Levels window
 - description, 9-13
 - overview, 9-12
- inquiry entry setup
 - overview
 - inquiry entry statuses, 9-6
- inquiry entry statuses
 - Inquiry Entry Statuses window
 - description, 9-7
- inquiry information types
 - Inquiry Information Types window
 - description, 9-5
- inquiry package items
 - Inquiry Package Items window
 - description, 9-4
- inquiry program details
 - Inquiry Program Details window
 - description, 9-11
- inquiry self service setup
 - overview
 - self service inquiry configuration, 9-8
- inquiry statuses
 - Inquiry Status window
 - description, 9-17
 - overview, 9-17
- inquiry unit set details
 - Inquiry Unit Set Details window
 - description, 9-12
- inquiry unit sets
 - overview, 9-11
- instances, calendar, 5-4
- institution contacts
 - overview, 6-25
- institution crosswalks
 - procedures
 - viewing institution crosswalk data, 6-20
- institution fee categories, 18-40
- institution records
 - procedures
 - creating institution records, 6-21
- institution records and details
 - overview, 6-20
- institution statistic type configurations
 - Institution Statistic Type Configuration window
 - description, 13-9
- institution statistics
 - overview, 6-31
 - procedures
 - creating institution statistics, 6-32
- institution statuses
 - overview, 6-18
- institution types
 - overview, 6-17
- Institution Waitlist options
 - Institution Waitlist Options Procedure window
 - description, 11-66
- institutions
 - Institutions window
 - description, 6-21, 6-23, 6-26, 6-27, 6-29, 6-30, 6-31, 6-32, 6-33
- instructors
 - Instructors window
 - description, 8-168
- intermission types
 - Intermission Types window
 - description, 11-19
 - overview, 11-18

J

- job text
 - procedures
 - entering concurrent process text, E-1

L

- late fee and finance charge process
 - creating finance charges, 18-111
 - defining late fees and finance charges, 18-110
- Lender Codes
 - Overview, 20-24
- Lender Relationships Codes
 - Overview, 20-26
- loan procedures
 - procedures
 - maintaining, 20-28
- loan processing
 - federal direct loans, 20-23
 - federal direct PLUS loans, 20-24
 - federal direct subsidized loans, 20-23
 - federal direct unsubsidized loans, 20-24
 - procedures
 - maintaining commonline setup, 20-28
- location accounts
 - Location Accounts window
 - description, 18-28
- location relationships
 - Location Relationships window
 - description, 6-45
 - overview, 6-44
 - procedures
 - creating an owning relationship, 6-45
- location types
 - overview, 6-33
- locations
 - Locations window
 - description, 6-35, 6-40
 - overview, 6-34
 - procedures
 - creating a location record, 6-35

M

- mapping and attributes

- Mapping and Attributes window
 - description, 24-6
 - example, 24-6
 - procedures
 - creating mapping and attributes, 24-6
- mark/grade entry configuration
 - Grading Period Cohort window
 - description, 14-57
 - example, 14-57
 - Mark/Grade Entry Configuration window
 - description, 14-57
- mark/grade entry configurations
 - procedures
 - online keying configuration, 14-56
- match criteria sets
 - Match Criteria Sets window
 - description, 4-21
- media equipment
 - Media and Equipment window
 - description, 8-172
- meet with classes procedure
 - Unit Section Occurrences Meet with Classes
 - Group window
 - description, 8-234
- milestone types
 - Milestone Types window
 - description, 19-11
- minimum submission percentages
 - overview, 19-2
- monthly calendar report concurrent process, E-4

N

- nominated completion periods
 - Nominated Completion Periods Procedure
 - window
 - description, 11-10
- nominated program attributes
 - See program attributes, 18-35
- non-standard unit section discontinuation deadline
 - setup
 - overview, 11-34
- non-standard unit section discontinuation deadline setup procedure
 - Non-Standard Unit Section Discontinuation

- Deadline Setup Procedure window
 - description, 11-35
- non-standard unit section enrollment deadline setup
 - overview, 11-24
- non-standard unit section enrollment deadline setup procedure
 - Non-Standard Unit Section Enrollment Deadline Setup window
 - description, 11-26
- note functionality, 8-27
- note types
 - Admission Application Note Types window
 - description, 10-73

O

- Oracle Student System Setup Steps for the United Kingdom
 - set up UK functionality student system codes
 - define grading schemas, 14-13
 - year of program setup, 11-81
 - set up year of program units, 11-81
- organization accounts
 - Organization Accounts window
 - description, 18-26
- organization structure notes
 - procedures
 - entering, 6-40
- organization unit statistic type configurations
 - Organization Unit Statistic Type Configuration window
 - description, 13-11, 13-13
- organizational statuses
 - overview, 6-47
 - procedures
 - creating organizational statuses, 6-47
- organizational structure note types
 - overview, 6-13
 - procedures
 - setting up organizational structure note types, 6-14
- organizational structure notes
 - overview, 6-32, 6-40, 6-59
- Organizational Structure subsystem
 - procedures
 - entering organizational unit locations, 6-55
- organizational unit details report concurrent process, E-5
- organizational unit funding source attendance mode
 - overview, 10-12
- organizational unit funding source program type group
 - overview, 10-10
- organizational unit funding source unit internal program level
 - overview, 10-14
- organizational unit locations
 - overview, 6-54
 - procedures
 - entering, 6-55
- organizational unit progression configurations
 - Organizational Unit Progression Configurations window
 - description, 15-17
 - System Organizational Unit Progression Calendar window
 - description, 15-19
- organizational unit relationships
 - definition, 6-61
 - Organizational Unit Relationships window
 - description, 6-61
 - procedures
 - creating parent and child relationship to an organizational unit, 6-61
- organizational unit student targets
 - Organizational Unit Student Targets window
 - description, 10-9
- organizational unit waitlist setup
 - Organizational Unit Waitlist Setup window
 - description, 11-68
- organizational unit waitlists
 - overview, 11-67
 - procedures
 - setting up, 11-68
- organizational units
 - Organizational Units window
 - description, 6-49
 - overview, 6-48
 - procedures
 - creating and changing an organizational

- unit, 6-49
- override credit points indicator
 - overview, 19-5
- override title indicator
 - overview, 19-6
- overseas secondary education qualification
 - Overseas Secondary Education Qualification
 - window
 - description, 10-29
 - overview, 10-28

P

- parent-child organizational unit report concurrent
 - process, E-6
- patterns of study
 - Patterns of Study window
 - description, 8-211
- Pell Grant Processing
 - procedures
 - creating Pell setup, 20-15
 - setting up federal pell alternate
 - schedule, 20-18, 20-30
- pell setup
 - Pell Setup window
 - description, 20-15
 - procedures
 - creating pell setup, 20-15
- pell setup matrix
 - Pell Setup Matrix window
 - description, 20-17
- Person
 - procedures
 - setting up self service person
 - responsibility, 4-14
- person details
 - overview
 - , 4-28
- person reference
 - procedures
 - entering phone and email details, 6-26, 6-39, 6-54
- person types
 - Setup Person Types window
 - description, 4-7

- personal statement types
 - Personal Statement Types window
 - description, 10-66
- personal statements
 - procedures
 - maintaining personal statements, 8-230
- phone and email
 - procedures
 - entering, 6-26, 6-39, 6-54
- primary programs
 - Primary Programs Set Up window
 - description, 8-90
 - example, 8-90
 - procedures
 - setting up primary programs, 8-90
- process
 - overview, 11-31
- program accounts
 - procedures
 - entering, 18-22
 - Program Accounts window
 - description, 18-23
 - example, 18-22
- program alternative exits
 - Program Alternative Exits window
 - description, 8-91
- program and unit note types
 - Program and Unit Note Types window
 - description, 8-51
- program annual loads
 - Program Annual Load window
 - description, 8-176
- program attempt fees
 - multiple, 18-36
 - single, 18-35
- program attendance types
 - Program Attendance Types window
 - example, 8-38
- program attributes
 - derived, 18-35
 - general, 18-33
 - nominated, 18-35
- program details, 8-26
- program fees, 18-35
- program group fee triggers

- overview
 - deletion of triggers, 18-76
 - program attributes, 18-76
- program groups
 - Program Groups window
 - example, 8-65, 8-89
- program occupational titles
 - Program Occupational Titles window
 - description, 8-79
- program offering
 - Program Offerings window
 - description, 8-83
 - example, 8-83
- program offering notes
 - Program Offering Notes window
 - description, 8-86
- program offering option admission categories
 - Program Offering Option Admission Categories window
 - description, 8-228
- program offering option notes
 - Program Offering Option Notes window
 - description, 8-225
- program rollover, 8-29
- program setup
 - attendance type load
 - overview, 8-36
 - maintainig program categories
 - overview, 8-32, 8-87
 - overview
 - award types, 8-40
 - awards and program versions, 8-40
- program stage types
 - Program Stage Types window
 - description, 8-49
 - example, 8-49
- Program Structuer and Planning
 - procedures
 - indicatong programs eligible for financial aid, 8-52
- Program Structure and Planning
 - administrative and academic unit sets, 8-177
 - overview, 8-1
 - procedures
 - creating cross-listed units groups, 8-230
 - creating degree details, 8-22
 - maintaining unit version rules, 8-268
 - setting up primary programs, 8-90
 - relationships between program details, 8-26
 - relationships between program versions and offerings, 8-26
 - relationships required to define unit sections, 8-138
 - relationships to define unit versions, 8-92
 - unit offering, 8-131
 - unit section attributes, 8-140
 - unit section rollover, 8-139
 - unit set functions, 8-177
 - unit set reference data, 8-182
- program structure and planning procedures
 - assigning unit subtitle, 8-124
 - creating unit repeat families, 11-55
- Program Structure and Planning subsystem
 - relationships
 - main data groups, 8-23
 - note functionality, 8-27
 - to define program versions, 8-25
 - unit section overview, 8-138
- program student targets
 - overview, 10-16
 - procedures
 - defining student targets by program and funding source, 10-16
 - Program Student Targets window
 - description, 10-17
- program type restrictions
 - Program Type Restrictions window
 - description, 10-36
- program types
 - overview, 19-2
- program unit levels
 - Program Unit Levels window
 - description, 8-117
- program version progression configurations
 - Program Version Progression Configurations window
 - description, 15-10
- program versions, 8-25
- programs eligible for financial aid

- procedures
 - indicating programs eligible for financial aid, 8-52
- Programs Eligible for Financial Aid window
 - example, 8-52
- progression
 - procedures
 - defining progression rule outcome, 15-32
 - maintaining progression outcome types, 15-15
 - maintaining progression rules, 15-27
 - maintaining system progression configuration, 15-6
 - progression outcome types
 - procedures
 - maintaining progression outcome types, 15-15
 - Progression Outcome Type window
 - description, 15-15
 - progression procedures
 - overview
 - progression rule outcome, 15-30
 - progression rule categories
 - Progression Rule Categories window
 - description, 15-21, 15-23
 - progression rule outcome
 - Progression Rule Outcome window
 - description, 15-33
 - progression rule outcomes
 - procedures
 - defining progression rule outcome, 15-32
 - Progression Rule Outcome window
 - example, 15-33
 - progression rules
 - procedures
 - maintaining progression rules, 15-27
 - Progression Rules window
 - description, 15-27
 - example, 15-27
 - progression setups
 - overview
 - organizational unit progression
 - configuration, 15-16
 - program version progression
 - configuration, 15-8

- progression outcome types, 15-12
- progression rule categories, 15-20
- system progression configuration, 15-4

R

- receivables control
 - overview, 18-18
- recognition types
 - credit, 12-5
 - preclusion, 12-5
- record tracking note types
 - overview, 7-6
- record tracking step catalog
 - overview, 7-6
- recruiting process
 - overview
 - references, 3-9, 3-29, 3-33
- recruiting setup
 - implement CRM Application Foundation for recruiting
 - resource manager, 3-10
 - implementing CRM Application Foundation for recruiting
 - interaction tracking, 3-11
 - territory manager, 3-10
 - implementing Marketing Online for recruiting
 - budgets, 3-31
 - deliverables, 3-31
 - list, 3-31
 - list import, 3-31
 - messages, 3-32
 - metrics, 3-32
 - implementing TeleSales for recruiting, 3-36
 - custom tabs, 3-41
 - interaction tracking, 3-40
 - interest types, 3-38
 - lead rank mapping, 3-37
 - lead rank values, 3-36
 - lead scorecard, 3-37
 - lead source, 3-36
 - lead status, 3-36
 - notes and note types, 3-40
 - opportunity management, 3-38
 - relationships, 3-36

- sales channels, 3-37
 - sales stages and sales methodology, 3-38
 - task types, 3-41
 - territories, 3-41
 - timeframe, 3-38
 - win probabilities, 3-38
- prerequisites, 3-9, 3-33
- refund tolerance limits
 - Refund Tolerance Limits window
 - description, 18-114
- repeatable indicator
 - overview, 19-5
- Research
 - research units
 - overview, 19-3
- Research
 - overview
 - attendance types, 19-2
 - configuring research calendars and date aliases, 5-38
 - research calendars and date aliases, 5-37
 - research grading schema, 19-6
 - research program structures, 19-1
 - research unit attributes, 19-4
 - sample configuration of research calendars and date aliases, 5-37
 - scholarship types, 19-15
 - setting up reference data, 19-8
 - socio economic objective classifications, 19-17
 - thesis examination types, 19-13
 - thesis panel member types, 19-14
 - thesis panel types, 19-12
 - thesis result codes, 19-16
 - procedures
 - setting up government type of activity codes, 19-20
 - setting up thesis result codes, 19-17
 - program types
 - overview, 19-2
 - tracking types and steps
 - overview, 19-8
- research calendar configuration procedure
 - Research Calendar Configuration window
 - description, 19-23
- research calendars and date aliases
 - overview, 5-37
- research codes, 19-9
- research grading schema
 - overview, 19-6
- research indicator
 - overview, 19-5
- research program structures
 - overview, 19-1
- research supervisor types
 - Research Supervisor Types window
 - description, 19-12
- research unit attributes
 - overview, 19-4
- research units
 - overview, 19-3
- restricted funding sources
 - Restricted Funding Sources window
 - description, 8-76
- rollover admission period concurrent process, E-12
- rollover calendar report concurrent process, E-4
- rollover faculty's assignment concurrent process, E-9
- rollover program offering pattern concurrent process, E-9
- rollover unit offering options concurrent process, E-10
- rollover, program, 8-29
- rollover, unit, 8-29
- rooms
 - overview, 6-42
- rule checking
 - program, 11-77
 - program and unit, 11-77
 - unit, 11-78
- rules
 - procedures
 - adding rules to rule groups and subgroups, 23-4
- rules process
 - calculating progression outcome and encumbrance expiration dates, 15-54
 - calculating show cause or appeal expiration dates, 15-53
 - calculations, 15-49
 - program stage rules syntax, 8-246

- program version rules syntax, 8-235
- progression definitions, 15-49
- terminology, 23-1
- unit set rules syntax, 8-269
- unit version rules syntax, 8-263
- weighted average mark calculation, 15-50
- Rules subsystem
 - user responsibilities
 - creating, 23-2
 - deleting, 23-2
 - modifying, 23-2

S

- sample configuration of research calendars and date aliases
 - overview, 5-37
- schedule rollover concurrent process, E-11
- scholarship types
 - overview, 19-15
 - Scholar Types window
 - description, 19-16
- secondary education assessment types
 - overview, 10-25
 - Secondary Education Assessment Types window
 - description, 10-26
- secondary education schools
 - overview, 10-18
- secondary school codes
 - Secondary Education Schools window
 - description, 10-19
- secondary schools
 - overview, 6-29
 - procedures
 - creating secondary schools, 6-30
- self service admission application types
 - procedures
 - setting up self service admission application types, 10-45, 10-47
 - Self Service Admission Application Types window
 - description, 10-46, 10-47
 - example, 10-46, 10-47
- self service admission application types procedure
 - procedures

- setting up self service admission application types, 10-45, 10-47
 - Self Service Admission Application Types window
 - example, 10-46, 10-47
- self service enrollment setup
 - overview, 11-82
 - Self Service Enrollment Setup window
 - description, 11-83
- self service inquiry configuration
 - procedures
 - setting up self service inquiry configuration, 9-9
 - Self Service Inquiry Configuration window
 - example, 9-9
- self service person responsibility
 - procedures
 - setting up, 4-14
- self service user activity setup
 - overview, 11-84
- self service user activity setup procedure
 - Self Service User Activity Setup window
 - description, 11-86
- setting up reference data
 - overview, 19-8
- Setups
 - procedures
 - creating organizational statuses, 6-47
 - setting up organizational structure note types, 6-14, 6-15
- setups
 - procedures
 - creating a location record, 6-35
 - creating an owning relationship, 6-45
 - creating and changing an organizational unit, 6-49
 - creating institution records, 6-21
 - creating institution statistics, 6-32
 - creating parent relationship to an organizational unit, 6-61
 - creating secondary schools, 6-30
 - entering organization structure notes, 6-40
 - viewing institution crosswalk data, 6-20
- socio economic objective classifications
 - overview, 19-17

- source types
 - Source Types window
 - description, 4-20
- special consideration categories
 - Special Consideration Categories window
 - description, 14-65
- special consideration outcomes
 - Special Consideration Outcomes window
 - description, 14-66
- special requirements
 - Special Requirements window
 - description, 8-61
- sponsor rollover concurrent process, E-12
- sponsorships
 - processes, 18-114
- Student Finance
 - procedures
 - defining account hierarchy, 18-17
 - defining application hierarchies, 18-105
 - defining balance rules, 18-107
 - defining credit type procedure, 18-104
 - entering program accounts, 18-22
 - entering unit accounts, 18-24
 - entering unit section accounts, 18-25
 - monitoring systems options, 18-13, 18-21
 - placing holds, 18-110
- student finance process
 - fee type rates, 18-32
- Student Finance subsystem
 - procedures
 - creating fee category calendar
 - instances, 18-66
- student program attempts
 - overview, 11-3
- student statistic types
 - Student Statistic Types window
 - description, 13-8
- student target types
 - overview, 10-5
- sub unit relationships
 - Sub Unit Relationships window
 - description, 8-118
- submission intake targets
 - overview, 10-7
 - Submission Intake Targets window

- description, 10-7
- supervisors venues
 - Supervisors to Venue window
 - description, 14-76
- system advanced standing types
 - System Advanced Standing Types window
 - description, 12-6
- system progression configurations
 - procedures
 - maintaining system progression
 - configuration, 15-6
 - System Progression Configuration window
 - description, 15-6
- systems options
 - procedures
 - monitoring, 18-13, 18-21
 - System Options window
 - description, 18-13

T

- teaching period codes
 - Teaching Period Codes window
 - description, 5-3
- teaching responsibilities
 - Teaching Responsibilities window
 - description, 8-110
- teaching responsibility overrides
 - Teaching Responsibility Overrides window
 - description, 8-146
- tertiary education levels of completion
 - overview, 10-23
 - Tertiary Education Level of Completion window
 - description, 10-24
- tertiary education levels of qualification
 - overview, 10-20
 - Tertiary Education Level of Qualification
 - window
 - description, 10-21
- test segments
 - Test Segments window
 - description, 10-82
- thesis examination types
 - overview, 19-13
 - Thesis Examination Types window

- description, 19-14
- thesis panel member types
 - overview, 19-14
 - Thesis Panel Member Types window
 - description, 19-15
 - example, 19-15
- thesis panel types
 - overview, 19-12
- thesis result codes
 - overview, 19-16
 - procedures
 - setting up, 19-17
 - Thesis Result Codes window
 - description, 19-17
- timeslot calendar configuration
 - overview, 11-87
 - Timeslot Calendar Configuration window
 - example, 11-88
- timeslot calendar configuration procedure
 - Timeslot Calendar Configuration
 - description, 11-88
- timeslot setup
 - overview, 11-88
 - Timeslot Setup window
 - description, 11-90
- tracking items
 - creating, 7-3
 - definition, 7-2
 - inquiring about, 7-4
 - recording progress of, 7-4
- tracking notes
 - recording, 7-6
- tracking process
 - creating tracking items, 7-3
 - inquiring about tracking items, 7-4
 - recording tracking item progress, 7-4
 - recording tracking notes, 7-6
 - terminology, 7-2
- tracking reference data
 - setup
 - tracking statuses, 7-5
 - tracking types, 7-5
- tracking status
 - Tracking Status window
 - description, 7-7

- tracking steps
 - Research subsystem, 19-8
- tracking types
 - definition, 7-2
 - recording, 7-5
- triggers
 - assigning to fee liabilities, 18-38
 - categories, 18-38
 - definition, 18-38
 - prerequisites, 18-38
 - program fees, 18-35
- types, recognition
 - credit, 12-5
 - Preclusion, 12-5

U

- UK Statistics window
 - description
 - unit tab, 8-126
- unit accounts
 - procedures
 - entering, 18-24
 - Unit Accounts window
 - description, 18-24
 - example, 18-24
- unit assessment items
 - procedures
 - entering unit assessment items, 14-45
 - Unit Assessment Items window
 - description, 14-45
 - example, 14-45
- unit assessment patterns
 - overview, 14-36
 - Unit Assessment Patterns window
 - description, 14-39
 - example, 14-39
- unit categories
 - Unit Categories window
 - description, 8-100
- unit categorizations
 - Unit Categorizations window
 - description, 8-121
- unit classes
 - Unit Classes window

- description, 8-101
- unit disciplines
 - Unit Disciplines window
 - description, 8-113
- unit discontinuation
 - overview, 19-6
- unit discontinuation date criteria
 - overview, 11-30
- unit discontinuation dates procedure
 - Unit Discontinuation Dates window
 - description, 11-33
- unit fee triggers
 - Unit Fee Triggers window
 - description, 18-86
- unit fields of study
 - Unit Fields of Study window
 - description, 8-115
- unit grading schemas
 - Unit Grading Schemas window
 - description, 8-112, 8-145
- unit internal program levels
 - Unit Internal Program Levels window
 - description, 8-102
- unit levels
 - Unit Levels window
 - description, 8-97
- unit modes
 - Unit Modes window
 - description, 8-98
- unit offering notes
 - Unit Offering Notes window
 - description, 8-137
- unit offering pattern notes
 - Unit Offering Pattern Notes window
 - description, 8-134
- unit offering pattern waitlist
 - Unit Offering Pattern Waitlist window
 - description, 11-72
- unit offering pattern waitlists
 - overview, 11-71
- unit offerings
 - Unit Offerings window
 - description, 8-132
- unit program type levels
 - Unit Program Type Level window

- description, 8-103
- unit repeat conditions
 - Unit Repeat Conditions window
 - description, 11-56
- unit repeat families
 - procedures
 - creating unit repeat families, 11-55
 - Unit Repeat Families window
 - description, 11-55
 - example, 11-55
- unit rollover, 8-29
- unit section
 - repeat family
 - overview, 11-57
- unit section accounts
 - procedures
 - entering, 18-25
 - Unit Section Accounts window
 - description, 18-25
 - example, 18-25
- unit section assessment items
 - Unit Section Assessment Items window
 - description, 14-50
- unit section credit points
 - overview, 14-7
- unit section details
 - Unit Section Details window
 - description, 8-150
- unit section enrollment limits and waitlist
 - overview, 11-73
- unit section notes
 - Unit Section Notes window
 - description, 8-157
- unit section occurrences
 - Unit Section Occurrences window
 - description, 8-164
- Unit Section Occurrences Meet with Classes Group window
 - description, 8-234
- unit set categories
 - Unit Set Categories window
 - description, 8-184
- unit set notes
 - Unit Set Notes window
 - description, 8-192

- unit set rules
 - Unit Set Rules window
 - description, 8-190
- unit set statuses
 - Unit Set Statuses window
 - description, 8-185
- unit sets
 - encumbrances, 8-182
 - overview, 8-186
 - reference data, 8-182
- unit statuses
 - Unit Statuses window
 - description, 8-94
- unit subtitles
 - procedures
 - assigning unit subtitle, 8-124
 - Unit Subtitle window
 - description, 8-125
 - example, 8-124
- unit version notes
 - Unit Version Notes window
 - description, 8-129
- unit version rules
 - overview, 8-268
 - procedures
 - maintaining, 8-268
- Universities and Colleges Admissions Service Process
 - UCAS configuration process
 - set up UCAS interface defaults, 21-5

V

- venue session availabilities
 - Venue Session Availability window
 - description, 14-69
- versions, program
 - See program versions, 8-25

W

- windows
 - Account Hierarchy, 18-17
 - Admission Period Date Overrides, 10-58
 - Admission Test Types, 10-80

- Application Hierarchies, 18-105
- Balance Rules, 18-107
- Calendar Date Alias Instances, 5-30
- Calendar Instance Relationships, 5-18
- Cross-Listed Units Groups, 8-230
- Date Alias Instance Pair, 5-32
- Enrollment Category Validation Setup, 11-79
- Financial Aid Grade Level Mapping, 20-32
- Grading Period Cohort, 14-57
- Hold Plans, 18-110
- Mapping and Attributes, 24-6
- Measurements, 16-12
- Program Accounts, 18-22
- Program Attendance Types, 8-38
- Program Groups, 8-65, 8-89
- Programs Eligible for Financial Aid, 8-52
- Progression Rule Outcome, 15-33
- Progression Rules, 15-27
- Rollover Fund Attributes, 20-58
- Self Service Admission Application Types, 10-46, 10-47
- Self Service Inquiry Configuration, 9-9
- Thesis Panel Member Types, 19-15
- Timeslot Calendar Configuration, 11-88
- Unit Accounts, 18-24
- Unit Assessment Items, 14-45
- Unit Assessment Patterns, 14-39
- Unit Repeat Families, 11-55
- Unit Section Accounts, 18-25
- Unit Subtitle, 8-124
- workflow and business events process
 - academic records, B-19
 - attendance submission workflow, B-23
 - creating a new custom process, B-23
 - optional customizations, B-23
 - required modifications, B-23
 - change grade request workflow, B-21
 - creating a new custom process, B-22
 - optional customizations, B-22
 - required modifications, B-22
 - degree audit request workflow, B-20

<ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-21 optional customizations, B-21 required modifications, B-21 degree audit third party receipt workflow, B-21 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-21 optional customizations, B-21 required modifications, B-21 grade submission workflow, B-22 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-22 optional customizations, B-22 required modifications, B-22 admissions, B-10 business events, 3-44 enrollments, B-16 financial aid, B-13 <ul style="list-style-type: none"> Corrections Not Initiated By School workflow, B-15 <ul style="list-style-type: none"> optional customizations, B-15 required modifications, B-15 DLPNA workflow, B-14 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-15 optional customizations, B-14 required modifications, B-14 OSSDTLS workflow, B-15 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-15 optional customizations, B-15 required modifications, B-15 SAP Notification workflow <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-15 Student Employment Notification workflow, B-16 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-16 optional customizations, B-16 required modifications, B-16 	<ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-16 optional customizations, B-16 required modifications, B-16 person, B-3 <ul style="list-style-type: none"> address change workflow, B-4 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-4 optional customizations, B-4 required modifications, B-4 generate new user workflow, B-4 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-5, B-6 optional customizations, B-5, B-6 required modifications, B-5 residency change workflow, B-3 <ul style="list-style-type: none"> <ul style="list-style-type: none"> creating a new custom process, B-4 optional customizations, B-4 required modifications, B-3
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