
PeopleSoft Student Records 9.0 PeopleBook

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PeopleSoft Student Records Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Campus Solutions Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Student Records.

PeopleSoft Campus Solutions Application Fundamentals

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation called *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook* and *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in Student Records operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

<i>Chapters</i>	<i>Description</i>
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it does not offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks* and the *PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Student Records

This chapter provides an overview of Student Records and discusses:

- Student Records business processes.
- Student Records integrations.
- Student Records implementation.

Student Records Overview

Student Records enables you to enter, track, and process all of your academic information. PeopleSoft minimizes repetitive data entry while enabling you to gain maximum control over the records—from the course catalog and schedule of classes to student programs, plans, and subplans.

After applicants are admitted and matriculate, Student Records moves forward to activate, enroll, grade, evaluate, and graduate students. In concert with PeopleSoft Academic Advisement processes, the Student Records application tracks students through graduation.

Student Records Business Processes

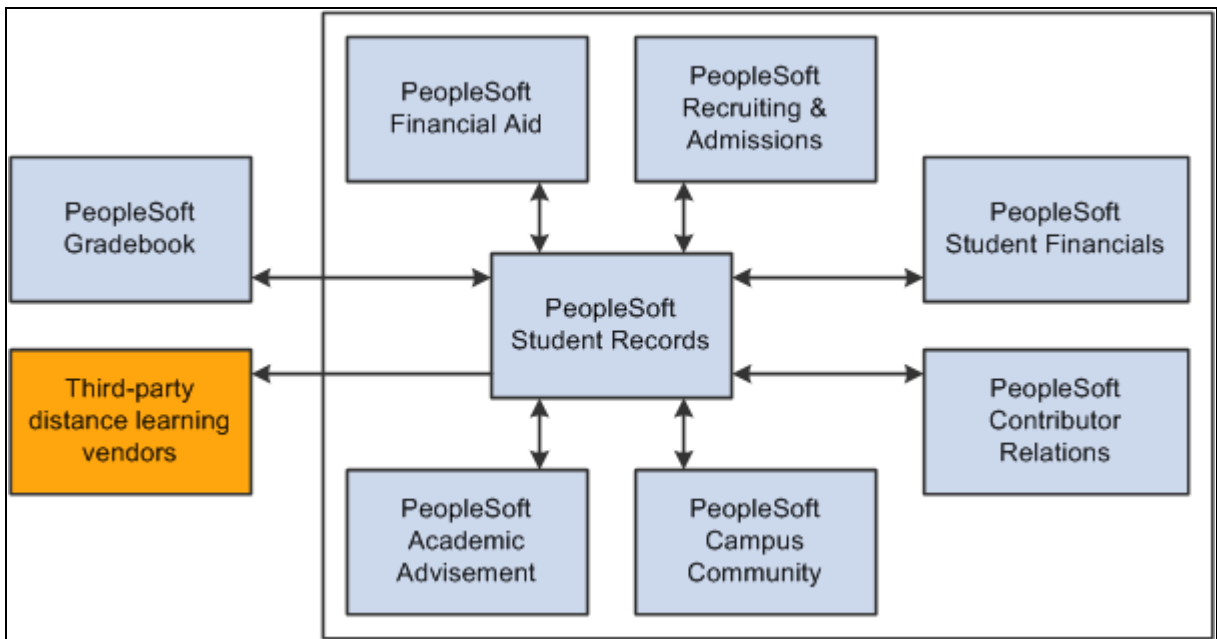
We discuss these business processes in the business process chapters in this PeopleBook.

- *Repeat Checking*: Enables you to manage students' repeat coursework.
- *Course Catalog*: Enables you to set up courses.
- *Enrollment Requisites*: Enables you to set up requisite groups, equivalencies, and course lists.
- *Schedule of Classes*: Enables you to schedule classes, search for facilities, and roll the schedule from term to term.
- *Instructor Workload*: Enables you to update, track, and report workload hours for individuals.
- *Program Activation and Management*: Enables you to activate students into academic programs and maintain their academic program, plan, and subplan data.
- *Batch Term Activation*: Enables you to activate groups of students into terms.
- *Quick Activation*: Enables you to activate students into academic programs, bypassing the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions.

- *Student Career Term Record Management*: Enables you to monitor and track student career term related records.
- *Enrollment Appointments*: Enables you to create and manage enrollment appointments.
- *Class Enrollment Transactions*: Enables you to enroll students into classes through various processes.
- *Enrollment Related Processes*: Enables you to enroll perform withdrawals and cancellations, manage wait lists, view summary statistics, and more.
- *Enrollment Verification*: Enables you to process enrollment verification reports for students, and if you have licensed PeopleSoft Learner Services, students can request the enrollment verification through self service.
- *Transfer Credit*: Enables you to evaluate, process, and post course, test, and other transfer credit using defined rules or manual rules.
- *Attendance Tracking*: Enables you to generate attendance rosters and track student attendance.
- *Student Data Tracking*: Enables you to link milestones to student records, manage honors and awards, manage academic standing, track student groups, maintain service indicators, and maintain extracurricular activities.
- *Interoperability for Learning Management Systems*: Give you the ability to provide a third-party learning management system (such as Blackboard CourseInfo) with personal profile data for learners and instructors, including enrollment data and maintenance, and limited course scheduling data maintenance.
- *Grading*: Enables you to generate grade rosters, enter grades and reviews, the midterm deficiency report, and the grade lapse process.
- *Graduation*: Gives you the ability to define degrees and honors, run the graduation reporting process, and graduate students.
- *Transcripts*: Gives you the ability to set up transcript data, define a transcript request, and produce transcripts.
- *Academic Statistics Consolidation and Reporting*: Enables you to prepare the system to consolidate academic statistics for students, to run processes that consolidate academic statistics, to make use of the consolidated statistics after processing them.
- *(CAN) Canadian Government Reporting*: Enables users with an installation country of Canada to generate reports for federal and provincial agencies.

Student Records Integrations

The following graphic illustrates the PeopleSoft applications that work with Student Records:



Student Records integrations with other PeopleSoft applications

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

Student Records Implementation

Student Records also provides component interfaces to help you load data from your existing system into Student Records tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interfaces	References
ACAD_CAENDER_TBL	SSR_ACAD_CALENDAR_TBL	See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i> , "Defining Traditional Academic Calendars," Defining Traditional Academic Calendars.
CIP_CODE_TABLE	SSR_CIP_CODE_TABLE	See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i> , "Designing Your Academic Structure," Modifying CIP and HEGIS Codes.
HEGIS_CODE_TABLE	SSR_HEGIS_CODE_TABLE	

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See Also

PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Program Enrollment Activity Management

Documentation about the Program Enrollment and Activity Management features delivered in Additional Features July 2011 and January 2012 is not included in this release (March 2012) of PeopleBooks.

For information about the new features and the additions to existing functionality, refer to the Program Enrollment Activity Management documentation which can be found on My Oracle Support: Doc ID 1400723.1.

Chapter 3

Defining Student Records Installation Settings

This chapter discusses how to review or define Student Record installation settings.

Reviewing or Defining Student Records Installation Settings

To review or define Student Records installation settings, use the Student Records Installation component (SSR_INSTALLATION). This chapter discusses:

- How to review or define Student Records default installation settings.
- How to review or define Enrollment Requirement Roster default installation settings.
- How to review or define Enrollment Requirement Processing default installation settings.

Pages Used to Review or Define Student Records Installation Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Records Installation	SSR_INSTALLATION	Set Up SACR, Install, Student Records Installation, Student Records Installation	Review or define Student Records default installation settings for general options, class searches, and enrollment requirement / requisite checking.
Enrollment Requirement Roster	SSR_INSTALLATION2	Set Up SACR, Install, Student Records Installation, Enrollment Requirement Roster	Review or define default installation settings for the enrollment requirement roster.
Enrollment Requirement Processing	SSR_INSTALLATION3	Set Up SACR, Install, Student Records Installation, Enrollment Requirement Processing	Review or define default installation settings for enrollment requirement processing.

Reviewing or Defining Default Installation Settings

Access the Student Records Installation page (Set Up SACR, Install, Student Records Installation, Student Records Installation).

Student Records Installation	Enrl Requirement Roster	Enrl Requirement Processing
Student Records Installation		
Defaults & Options		
☒ Use SR Class Schedule Facility Conflict Checking		
Default Section Size:	30	
Transcript Date Print:	Do Not Print Any Dates	
GPA Rounding/Truncating Option:	Round to 3 decimal places	
Class Search		
Class Search Results Limits:		
Warning Limit:	50	rows
Error Limit:	250	rows
Class Search Subject Option:		
☒ Drop-Down List Box ☐ Prompt Search		
Administrative Class Detail Options		
Show Textbook Detail: ☒		
Enrollment Requisite Checking		
Validate Conditions Using:		
☒ Max Program Effdt for Term		
☐ Action Date		
When Enrollment Requirement Status is Conditionally Satisfied:		
☐ Return a warning message		
☒ Success		

Student Records Installation page

Defaults & Options

Use SR Class Schedule Facility Conflict Checking

Select to enable facility conflict checking when scheduling classes. The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.

Note. This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.

Default Section Size

Enter a number to use as a default for class size. This value is used in the creation of new class sections. The value is originally rolled into the Catalog record when it is created, and then it is used to enter the number by default into the ENRL_CAP field in the CLASS_TBL.

Transcript Date Print

Select the date on which you want the system to print when printing student transcripts. Select a value to be the default value when a row is entered. Select one value per term. Values are:

Print Class Dates: Prints the valid start and end dates for each class on a transcript.

Print Session Dates: Prints the valid start and end dates for a session within a term on a transcript.

Print Term Dates: Prints the valid start and end dates for the term on a transcript.

Do Not Print Any Dates: No dates print on the transcript.

GPA Rounding/Truncating Option (grade point average rounding/truncating option)

Enter a value to indicate the number of decimal places to which you want to round or truncate the grade point average displayed for a student throughout the system. The maximum allowed is three decimal places.

Class Search

Class Search Results Limits

Enter a value in the Warning Limit and Error Limit fields to indicate the number of classes for the system to display when a student searches for a class.

- **Warning Limit:** When the limit is reached, the student receives a Warning message. The student can continue to the search results or cancel and add additional criteria to narrow the search.
- **Error Limit:** When the limit is reached, the student receives an Error message requesting that the student specify additional search criteria.

Class Search Subject Option	Select to indicate whether the Course Subject field on the Search for Classes page appears as a drop-down list box or as a select subject button.
	Note. Regardless of the option setting, the Course Subject field dynamically changes to a select subject button if the selected institution has more than 300 course subjects.

Administrative Class Details Options

Show Textbook Detail	If you select this check box, textbook detail appears on the administrative view of the Class Detail page. Select the corresponding check boxes in the Self Service Student Records setup component (Set Up SACR, Common Definitions, Self Service, Student Records) if you want textbook information to appear on the self-service Class Detail page for students and visitors and for instructors and advisors. The information that appears on the Class Detail page depends on the data that you enter on the Schedule of Classes – Textbook page (Curriculum Management, Schedule of Classes, Schedule New Course, Textbook).

See [Chapter 24, "Managing the Schedule of Classes," Defining Textbooks for Classes, page 568.](#)

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Setting Up Student Records Self-Service."

Enrollment Requisite Checking

Use this group box to select how the requisite checking process validates programs, plans, and subplans for requisites that specify program, plan, or subplan conditions—for example, if a student enrolls in a class for a term and the class has a requisite condition of Plan = BIOCHEM, what is the maximum effective date that a plan of BIOCHEM can have to meet the requisite for that term.

Validate Conditions Using:

Max Prog Effdt for Term
(maximum program effective date for term)

This option is selected by default.

The requisite checking process uses the following logic to establish if a student meets program, plan, or subplan conditions:

- If the enrollment action date is before or equal to the term begin date, use the term begin date to determine the program, plan, or subplan: Find the maximum effective-dated row, where the effective date is before or equal to the term begin date.

For example, on 05/30/07 a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07. The student's current program is FAU (with an effective date of 01/01/06), but the student has a future-dated program change of 07/01/07 for the LAU program. The student meets the requisite condition because the maximum effective-dated program row (which is before or equal to the term begin date) is for the LAU program.

- If the enrollment action date is after the term begin date and before or equal to the maximum program effective date for Term, use the action date to determine the program, plan, and subplan: Find the maximum effective-dated row where the effective date is before or equal to the enrollment action date.

For example, on 09/05/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. The student transferred to the LAU program effective 09/02/07. Fall 2007 commences on 08/30/2007 but has a maximum effective for term of 09/14/07. The student therefore meets the requisite condition.

- If the enrollment action date is after the maximum program effective date for term, use the maximum program effective date for term to determine the program, plan, or subplan: Find the maximum effective-dated row where the effective date is before or equal to the maximum program effective date for term.

For example, on 09/17/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07 but has a maximum program effective date for term of 09/14/07. The student transferred to the LAU program effective 09/15/07. The student does not meet the requisite condition, because FAU, not LAU is the program for which the maximum effective date is before or equal to the maximum effective date for term.

Action Date

The requisite checking process uses the enrollment action date instead of the maximum program effective date for term when the term begin date is reached:

- If the enrollment action date is before or equal to the term begin date, the process uses the same logic as when the Max Program Effdt for Term option is selected.
- If the enrollment action date is after the term begin date, use the enrollment action date to determine program, plan, or subplan: Find the maximum effective-date row where the effective date is before or equal to the enrollment action date.

For example, on 09/17/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07 but has a maximum program effective date for term of 09/14/07. The student transferred to the LAU program effective 09/15/07. The student meets the requisite condition because LAU is the program for which the maximum effective date row is before or equal to the enrollment action date.

When Enrollment Requirement Status is Conditionally Satisfied:

Return a warning message

When requisite checking uses in-progress courses to satisfy an enrollment requirement, the user receives a warning message indicating that the prerequisite has been met conditionally and that the prerequisite must be satisfied prior to the start of the class.

Success

This option is selected by default. When requisite checking uses in-progress courses to satisfy an enrollment requirement, a message of success is returned.

See [Chapter 7, "Setting Up Enrollment Requisites," page 131.](#)

See [Chapter 35, "Managing Post Enrollment Requirement Checking," page 851.](#)

Reviewing or Defining Enrollment Requirement Roster Default Installation Settings

The Post Enrollment Requirement Checking feature:

- Provides the ability to capture the status of the enrollment requirement check at the time of enrollment (satisfied, conditionally satisfied, overridden, permitted, enrollment component). Enrollments that do not satisfy the requirement are rejected. The feature captures the status for both enrolled and wait listed students.
- Provides the ability for users to re-run the Enrollment Requirement Checking process (where the Enrollment Engine calls Academic Advisement for enrollment requirement evaluation) on enrolled and wait listed classes after in-progress grades have been posted. The capability is delivered in on-line/remote call mode as well as a batch process.

- Includes an administrative component that allows decision makers to identify and view students who are in non-compliance of class enrollment requirements.
- Includes functionality to identify and process students that need to be dropped from classes for non-compliance as a result of post-enrollment requirement checking.
- Through the use of communications, includes functionality to notify students when they have been administratively dropped from a class for non-compliance.

If you plan to use communications for post enrollment requirement checking, use the instructions in the following document to set up communications and then use the 3Cs process to create and generate the communication:

See: PERC Communications Setup and Processing.pdf. This document is included in the PERC Documentation Package which is posted to My Oracle Support.

- Includes a batch process to generate reports of students in non-compliance of enrollment requirements.

Access the Enrollment Requirement Roster page (Set Up SACR, Install, Student Records Installation, Enrollment Requirement Roster).

Student Records Installation	Enrl Requirement Roster	Enrl Requirement Processing
Enrollment Requirement Roster		
Collapsible Area Defaults ☐ Collapse Course Information group box ☐ Collapse Enrollment Requirement group box ☐ Collapse Filter group box		
Roster and Batch Processing Filter Default Settings Enrollment Status Display ☒ Enrolled ☒ Waitlisted ☐ Dropped Most Recent Requirement Status Display students in non-compliance ☒ Not Satisfied ☒ Conditionally Satisfied Display other students ☐ Enrollment Component ☐ Overridden ☐ Permitted ☐ Satisfied ☐ Unknown		
Drop Review for Batch Processing ☒ Enrollment Requirement Rosters must be reviewed prior to batch processing of drops		
Enrollment Action Reason When a student is dropped for non-compliance of enrollment requirements, set Drop Action Reason to: PERC		
Additional Student Information for Decision Makers ☒ Provide link to student Course History ☒ Provide link to Student Statistics ☒ Academics page from Student Services Center ☐ Administrative Term History page		
Security ☐ Enforce Academic Organization Security		
Notes ☐ Enable notes to be deleted		

Enrollment Requirement Roster page

Find documentation about the pages that are used to run Post Enrollment Requirement Checking—the Enrollment Requirement Roster page and the Run Post Enrollment Requirement Checking page—in the Managing Post Enrollment Requirement Checking chapter.

Collapsible Area Defaults

Collapse Course Information group box, Collapse Enrollment Requirement group box, and Collapse Filter group box Clear these check boxes if you want course information, enrollment requirement description, and enrollment requirement roster filter to appear expanded by default on the Enrollment Requirement Roster. Select if you want the fields to appear collapsed.

Regardless of this setup, you can expand and collapse the fields on the Enrollment Requirement Roster.

Roster and Batch Processing Filter Default Settings

Enrollment Status Select the enrollment statuses that you want to appear by default in the Set Filter Options group box on the Enrollment Requirement Roster. You can override the values on that page.

Most Recent Requirement Status: Display Students in non-compliance Select the enrollment requirement non-compliance statuses that you want to appear by default on the Enrollment Requirement Roster. You can override the values on that page.

Most Recent Requirement Status: Display other students Select any additional enrollment requirement statuses you want to appear by default on the Enrollment Requirement Roster. You can override the values on that page.

Drop Review for Batch Processing

Enrollment Requirement Rosters must be reviewed prior to batch processing of drops Select this check box to ensure that an enrollment requirement roster is set to *Review Complete* before batch drop processing occurs. The Review Complete for Batch Drop Processing check box appears on the Enrollment Requirement Roster and the following message appears on the Process Drop Requests for Post Enrollment Requirements batch processing page: *Drops will only be processed for classes where Drop Review is set to Complete.*

Clear this check box if you do not use batch processing of drops or if you do not want to ensure that the enrollment requirement roster is reviewed before batch dropping students for non-compliance. The Review Complete for Batch Drop Processing check box is not available on the Enrollment Requirement Roster and the message does not appear on the batch drop processing page.

Enrollment Action Reason

When a student is dropped for non-compliance of enrollment requirements, set Drop Action Reason to

Define a default drop action reason code value to be used when a student is dropped for non-compliance of enrollment requirements. The value action reason code of *PERC* is delivered but can be changed. The value should be unique. When a class is dropped using the action reason code of *PERC*, the enrollment record is retained regardless of the Academic Calendar date for the drop delete deadline.

Additional Student Information for Decision Makers

Provide link to student Course History

Select this check box to allow decision makers and other users to access student course history from a link on the Enrollment Requirement Roster (the Course History link on the Audit / Information Links tab). Clear the check box to hide the Course History link.

Provide link to Student Statistics

Select this check box to allow decision makers and other users to access student academic statistics from a link on the Enrollment Requirement Roster (the Statistics link on the Audit / Information Links tab). Select an option to identify whether the user links to the Academics page (recommended) as used in the Student Services Center or the Administrative Term History page. Clear the check box to hide the Statistics link.

Security

Enforce Academic Organization Security

Select this check box to enforce academic organization security within the Enrollment Requirement Roster and related processing.

Notes

Enable notes to be deleted

Select this check box to enable notes to be deleted from the Enrollment Requirement Roster: Tracking of Key Transactions & User Notes page. Clear to prevent notes from being deleted.

See [Chapter 7, "Setting Up Enrollment Requisites," page 131.](#)

See [Chapter 35, "Managing Post Enrollment Requirement Checking," page 851.](#)

Reviewing or Defining Enrollment Requirement Processing Default Installation Settings

Find documentation about the pages that are used to run Post Enrollment Requirement Checking—the Enrollment Requirement Roster page and the Run Post Enrollment Requirement Checking page—in the Managing Post Enrollment Requirement Checking chapter.

Access the Enrollment Requirement Processing page (Set Up SACR, Install, Student Records Installation, Enrollment Requirement Processing).

Student Records Installation	Enrl Requirement Roster	Enrl Requirement Processing

Enrollment Requirement Processing

Page Processing

Run Post Enrollment Requirement Checking

☒ Allow Post Enrollment Requirement Checking to be run from Enrollment Requirement Roster

☒ Allow Drop Request Indicator to be set for Students in Non-Compliance

Default to:

☐ If process results in a status of Conditionally Satisfied

☐ If process results in a status of Not Satisfied

Process Drops for Non-Compliance

☒ Allow Drop Processing to be run from Enrollment Requirement Roster

Default drop process to:

For students listed above, process drops for:

☒ selected students

☐ students where Drop Request Indicator is selected

☐ students with a post enrollment requirement status of:

☐ Conditionally Satisfied

☐ Not Satisfied

☒ Allow Override of Action Date

Processing Limit

Return Warning Message when processing more than students at a time

Error Message - Limit page processing to a maximum of students at a time

Enrollment Requirement Processing page (1 of 2)

Batch Processing	
Run Post Enrollment Requirement Checking	
☒ Allow Drop Request Indicator to be set for Students in Non-Compliance Default to: ☐ If process results in a status of Conditionally Satisfied ☐ If process results in a status of Not Satisfied	
Process Drops for Non-Compliance	
Default Non-Compliance Selection To: Process Drops for: ☒ students where Drop Request Indicator is selected ☐ students with a post enrollment requirement status of: ☐ Conditionally Satisfied ☐ Not Satisfied ☒ Allow Override of Action Date	
Communication Category Default	
PERC	PERC Processing

Enrollment Requirement Processing page (2 of 2)

Use the Page Processing group box to select the information and values that you want to appear by default on the Enrollment Requirement Roster.

Page Processing: Run Post Enrollment Requirement Checking

Allow Post Enrollment Requirement Checking to be run from Enrollment Requirement Roster

Select this check box to allow users to run post enrollment requirement checking from the Enrollment Requirement Roster. If selected, the Run Post Enrollment Requirement Checking group box appears on the roster. If cleared, the group box is not available—users would instead run batch post enrollment requirement checking.

Allow Drop Request Indicator to be set for Students in Non-Compliance

If post enrollment requirement checking is enabled, select this check box to allow the Drop Request Indicator to be set from the Enrollment Requirement Roster processing page: If the check box is selected, the Set Drop Request for Students in Non-Compliance options appear in the Run Post Enrollment Requirement Checking group box on the roster. If the check box is cleared, the options are hidden.

Default to: If process results in a status of Conditionally Satisfied and Default to: If process results in a status of Not Satisfied

If you have selected the Allow Drop Request Indicator to be set for Students in Non-Compliance check box, use these check boxes to set the status default settings—Conditionally Satisfied and Not Satisfied—on the Enrollment Requirement Roster.

You can override the values on the Enrollment Requirement Roster.

Page Processing: Process Drops for Non-Compliance

The check boxes and values that are selected here appear by default on the Enrollment Requirement Roster but can be overridden on that page.

Allow Drop Processing to be run from Enrollment Requirement Roster

Select this check box to allow users to run drop processing from the Enrollment Requirement Roster. If selected, the Process Drops for Non-Compliance group box appears on the roster page. If cleared, the group box is not available—users would instead run batch drop processing.

Default drop process to:

If drop processing is enabled from the Enrollment Requirement Roster, define the default selection to:

- selected students: The drop process is run only for selected students.
- students where Drop Request Indicator is selected: The drop process is run only for students for whom the Drop Request Indicator value is selected.
- students with a post enrollment requirement status of: The drop process is run only for students with a post enrollment requirement status of either *Conditionally Satisfied* or *Not Satisfied*. When this option is selected, the Conditionally Satisfied and Not Satisfied check boxes become available for selection.

Allow Override of Action Date

If drop processing is enabled from the Enrollment Requirement Roster, select this check box to allow a user to override the action date: the Override Action Date check box is available on the Enrollment Requirement Roster. The user must have enrollment security to override the action date.

Page Processing: Processing Limit

Return Warning Message when processing more than

Set the maximum number of students that can be selected for page processing before receiving a warning message. Our recommendation for a warning message is for 15 students—you therefore receive a warning message when 16 students or more are selected.

Error Message - Limit page processing to a maximum of	Set the maximum number of students that can be selected for page processing before receiving an error message. To assist with response time, use batch Post Enrollment Requirement Checking processing for large numbers of students. Our recommendation for an error message is for 20 students—you therefore receive an error message if 21 or more students are selected.

Batch Processing: Run Post Enrollment Requirement Checking

Allow Drop Request Indicator to be set for Students in Non-Compliance	Select this check box to allow the Post Enrollment Requirement Checking batch process to set the Drop Request Indicator for a student when the process results in a non-compliant status. If you select this check box, the Action group box which contains the Set Drop Request Indicator for Students in Non-Compliance options is available on the Run Post Enrollment Requirement Checking page.

Default to: If process results in a status of Conditionally Satisfied and Default to: If process results in a status of Not Satisfied	Use these check boxes to set the status default settings on the Run Post Enrollment Requirement Checking page: Conditionally Satisfied status and/or Not Satisfied. You can override the values on the batch processing page.

Batch Processing: Process Drops for Non-Compliance

Default Non-Compliance Selection To	Process administrative student drops for students who are non-compliant with class enrollment requirements.

Process Drops for	Set the default options that you want to appear in the Non-Compliance Selection group box on the Process Drop Requests for Post Enrollment Requirement page: • students where Drop Request Indicator is selected: the process drops only students for whom the drop request indicator is selected. • students with a post enrollment requirement status of: When this option is selected, the Conditionally Satisfied and Not Satisfied check boxes become available for selection. The process drops only students that have a non-compliant post enrollment requirement status that matches the check box selection.

Allow Override of Action Date	Select this check box to allow a user to override the action date for Process Drop requests: the Override Action Date check box is available on the Process Drop Requests for Post Enrollment Requirement page. The user must have enrollment security to override the action date.

See [Chapter 7, "Setting Up Enrollment Requisites," page 131.](#)

See [Chapter 35, "Managing Post Enrollment Requirement Checking," page 851.](#)

Communication Category Default

This value default is used when creating communications for PERC. A value of *PERC* is delivered but can be changed. The value should be unique.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Communications," Defining a Communication Category.

If you plan to use communications for post enrollment requirement checking, use the instructions in the following document to set up communications and then use the 3Cs process to create and generate the communication:

See: PERC Communications Setup and Processing.pdf. This document is included in the PERC Documentation Package which is posted to My Oracle Support.

Chapter 4

Preparing for the Course Catalog and Schedule of Classes

This chapter discusses how to:

- Set up catalog and schedule options.
- Define buildings, rooms, and classroom facilities.
- Designate approved instructors and advisors.
- Define requirement designations.
- Set up unit conversions.
- Define standard meeting patterns.
- Define modes of instruction.

See Also

[Chapter 6, "Setting Up the Course Catalog," page 87](#)

[Chapter 24, "Managing the Schedule of Classes," page 539](#)

Setting Up Catalog and Schedule Options

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

- Define class notes.
- Define global notes.
- Define course attributes.
- Define exam codes.
- Define course material types.
- Define course material type order.

Pages Used to Set Up Catalog and Schedule Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Class Notes Table	CLASS_NOTES_TBL	Curriculum Management, Schedule of Classes, Class Notes Table, Class Notes Table	Define class notes.
Global Notes Table	GLOBAL_NOTES_TBL	Curriculum Management, Schedule of Classes, Global Notes Table, Global Notes Table	Define global notes.
Course Attributes	CRSE_ATTR_TBL	Set Up SACR, Product Related, Student Records, Curriculum Management, Course Attributes, Course Attributes	Define course attributes and attribute values.
Exam Code Table	EXAM_CODE	Curriculum Management, Schedule of Classes, Exam Code Table, Exam Code Table	Define exam time codes for different types of examinations.
Course Material Type	SSR_CRSE_MAT_TBL	Set Up SACR, Product Related, Student Records, Curriculum Management, Course Material Type, Course Material Type	Define course material types.
Course Material Type Order	SSR_CRSE_MAT_ORD	Set Up SACR, Product Related, Student Records, Curriculum Management, Course Material Type Order, Course Material Type Order	Organize course material to be displayed in a specific order.

Defining Class Notes

Access the Class Notes Table page (Curriculum Management, Schedule of Classes, Class Notes Table, Class Notes Table).

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

Effective Date

Enter an effective date for the class note. The effective date determines when the status that you select is valid.

Status	Select a status for the class note. Select <i>Active</i> when adding a new class note. Select <i>Inactive</i> if your institution no longer uses this class note.
Description	In the Description field, enter a short, informative description for the note. This is used for internal processes only.
Long Description	In the Long Description field, enter a detailed description for the note. This text appears in the schedule of classes if you assign this note to a class on the Notes page.

Defining Global Notes

Access the Global Notes Table page (Curriculum Management, Schedule of Classes, Global Notes Table, Global Notes Table).

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

Print Location	Indicates whether the note text appears on the schedule of classes report before or after the subject area (if you specify a subject area), or whether the note text appears before or after the academic group for the term (if you do not specify a subject area). Available values are <i>Print After</i> and <i>Print Before</i> . You should not change these values because doing so requires a substantial programming effort.
Description	Enter a short description for the global note.
Long Description	Enter a detailed description for the global note. This text appears on the schedule of classes report in the location that you specify.

Defining Course Attributes

Access the Course Attributes page (Set Up SACR, Product Related, Student Records, Curriculum Management, Course Attributes, Course Attributes).

Course Attributes page

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

Status

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

Description

The description that you enter here appears on the schedule of classes report or the course catalog report if you select the Schedule Print check box or the Catalog Print check box.

Course Attribute Value

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

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

Catalog Print

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

Note. The SSR_COURSE (Course Catalog) web service is one of a number of delivered Enrollment Web Services. The service operation SSR_GET_COURSES: Browse Course Catalog Summary obeys the Catalog Print setup that you select on the Course Attributes page and on the Requirement Designation Table page.

For detailed information about Enrollment Web Services:

See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide on My Oracle Support (Doc ID 1371391.1).

See [Chapter 36, "Using Enrollment Web Services,"](#) page 875.

- Schedule Print

Select to display the course attribute formal description in the schedule of classes report.
- Description

Enter a description of the attribute values.
- Formal Description

Enter the text that you want to appear on the schedule of classes report or the course catalog report if you select the Schedule Print check box or the Catalog Print check box.

Defining Exam Codes

Access the Exam Code Table page (Curriculum Management, Schedule of Classes, Exam Code Table, Exam Code Table).

Exam Code Table

Academic Institution:

PSUNV

PeopleSoft University

Term:

0310

1998 Spring

Session:

1

Regular Academic Session

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

Exam Code Table page

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

- Exam Time Code

Enter an exam time code to define (in an abbreviated manner) the exam code.
- Exam Date

Enter the date for the exam.
- Exam Starting Time

Enter the start time of the exam.
- Exam Ending Time

Enter the end time of the exam.
- Exam Type

Select the exam type. Values for this field are delivered with your system as translate values. You can modify these translate values.

- Class Start Time From

Enter the minimum start time for classes with which you want to associate the exam time code. The system uses the value during the exam scheduling process. The system schedules exams for classes that fall within the two start times (and days) that you designate.
- Class Start Time To

Enter the maximum start time for classes with which you want to associate the exam code. The system uses the value during the exam scheduling process. The system schedules exams for classes that fall within the two start times (and days) that you designate.
- M (Monday), T (Tuesday), W (Wednesday), T (Thursday), F (Friday), S (Saturday), and S (Sunday)

Select the days of classes that you want to associate with the exam code.

See Also

Chapter 24, "Managing the Schedule of Classes," Scheduling Examinations, page 605

Defining Course Material Types

Access the Course Material Type page (Set Up SACR, Product Related, Student Records, Curriculum Management, Course Material Type, Course Material Type).

Course Material Type

Course Material Type: TEXTBOOK

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Textbook

Short Description: Textbook

Course Material Type page

- Status

Select a status for this course material type. Select *Active* when you add a new course material type. Insert a new effective date and select *Inactive* if your institution no longer uses this course material type.
- Description

The description that you enter here appears in the Textbook Assignment group box on the (Schedule of Classes) Textbook page and is used on the Class Detail page and the Faculty and Student Center Textbook Summary page.

See Chapter 24, "Managing the Schedule of Classes," Defining Textbooks for Classes, page 568.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Self-Service Course Catalog and Schedule."

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Self-Service Enrollment."

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Faculty Center."

Defining Course Material Type Order

Access the Course Material Type Order page (Set Up SACR, Product Related, Student Records, Curriculum Management, Course Material Type Order, Course Material Type Order).

Course Material Type Order					
	*Display Order	*Course Material Type	Description		
1	10	TEXTBOOK	Textbook	+	-
2	20	ARTICLE	Article	+	-
3	30	OTHER	Other Course Material	+	-

Course Material Type Order page

Note. The system uses the display order that you define here to determine the order in which course materials appear on the Class Detail page and on the self-service Faculty and Student Textbook Summary pages. If you do not define a course material display order, the course material appears at the end of the list.

Display Order	Define the order in which you want the course material type to appear on Class Detail page and on the faculty and student Textbook Summary pages.
Course Material Type	Select a value based on the course material type values that you defined on the Course Material Type page.
Description	The description appears by default from the Course Material Type page.

Defining Buildings, Rooms, and Classroom Facilities

To set up facilities, use the Building Table (BLDG_TBL), Room Characteristics Table (ROOM_CHRSTC_TBL), and Facility Table (FACILITY_TBL) components.

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

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

- Define facility components.
- Define facility characteristics.

Pages Used to Define Buildings, Rooms, and Classroom Facilities

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Building Table	BLDG_TBL	Set Up SACR, Foundation Tables, Facilities, Building Table, Building Table	Define all campus buildings that you might use in class and event scheduling. Building codes that you create here are prompt values on the Facility Table page.
Room Characteristics Table	ROOM_CHRSTC_TBL	Set Up SACR, Foundation Tables, Facilities, Room Characteristics Table, Room Characteristics Table	Define room characteristics, such as types of seating and resources that are available. You attach room characteristics to facilities on the Facility Characteristic page and you can use them when you: • Define courses. • Schedule classes. • Plan events. You must enter a numeric room characteristic code from 01 to 96.
Facility Table	FACILITY_TBL	Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Table	Define facilities and facility components.
Facility Component	FACILITY_COMPONENT	Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Component	Link components of facilities to parent facilities.
Facility Characteristic	FACILITY_CHRSTC	Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Characteristic	Define room characteristics and facility blackout times.

Defining Buildings

Access the Building Table page (Set Up SACR, Foundation Tables, Facilities, Building Table, Building Table).

Status	Select the status of the building. Select <i>Active</i> when the building is being used on the Facility Table page. Select <i>Inactive</i> when you no longer use the building.
Description	Enter a description of the building.
Short Description	Enter a short description of the building.

Defining Room Characteristics

Access the Room Characteristics Table page (Set Up SACR, Foundation Tables, Facilities, Room Characteristics Table, Room Characteristics Table).

Status	Select a status for this room characteristic. Select <i>Active</i> when adding a new room characteristic. Select <i>Inactive</i> only if your institution no longer uses this room characteristic.
Description	Enter a description.
Short Description	Enter a short description.

Defining Facilities and Rooms

Access the Facility Table page (Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Table).

The screenshot shows the 'Facility Table' page with the following data and controls:

- SetID:** PSUNV
- Facility ID:** ANGE101
- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Angel101
- *Short Description:** Angel101
- *Building:** ANGE
- Room:** 101
- *Location Code:** HACIENDA
- *Facility Type:** Lecture Rm
- Capacity:** 50
- Academic Organization:** (empty)
- Minimum Utilization Percent:** 0
- Facility Group:** (unchecked)
- General Assignment:** (checked)
- Check for Facility Conflict:** (checked)

Facility Table page

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

Status	Select a status for this facility. Select <i>Active</i> when adding a new facility. Select <i>Inactive</i> only if your institution no longer uses this facility.
Facility Group	If this check box is selected and unavailable for entry, the facility is a parent facility with facility components.
Building	Enter the building in which the facility is located. Define buildings on the Building Table page.
Room	Enter the room number.
Capacity	Enter the maximum number of people that a facility accommodates.
Location Code	You can specify locations such as a building cluster on campus or satellite campuses. Define location codes on the Location Table in the Human Resources menus in your system.
Facility Type	Select a facility type to further define the space. Values for this field are delivered with your system as translate values. You can modify these values.
Partition	Select a partition field value to indicate the section of the campus where the facility is located, such as <i>First</i> , <i>Second</i> , <i>Third</i> , or <i>Fourth</i> quadrant. Use the Partition field to interact with Universal Algorithm Schedule25, which can look at where an instructor's office is located and attempt to schedule the instructor's classes in facilities within the same partition. The maximum number of partitions for Universal Algorithm Schedule25 is 96. Therefore, be sure that you select a value between <i>01</i> and <i>96</i> . Values for this field are delivered with your system as translate values. You can modify these values. For more information about the interface with Universal Algorithm Schedule25, refer to the Universal Algorithm Schedule25 documentation.
Academic Organization	Enter an academic organization to indicate that this facility is reserved for the sole use of that academic organization. Locations might be reserved by an academic organization so that only classes for that academic organization are assigned to that location when you are using the Universal Algorithm product, Universal Algorithm Schedule25. When using the PeopleSoft internal facility search and assignment feature, the system does not use academic organization.
General Assignment	Select to open the location for general assignment. When you select this check box, the Academic Organization field becomes unavailable.
Minimum Utilization Percent	Enter the minimum usage that a facility should experience. This field is for internal record keeping only, and has no programming associated with it.

Check for Facility Conflict

Select to have the system allow only one class to be scheduled for this facility at any given period of time. If you want to schedule more than one class at the same time in this particular facility, such as a field or gymnasium, do not select this check box.

Defining Facility Components

Access the Facility Component page (Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Component).

Facility Table Facility Component Facility Characteristic					
Find View All First 1 of 1 Last					
SetID:	PSUNV				
Facility ID:	ANGE101	Angel101			
Effective Date:	01/01/1900	Status:	Active		
Building:	Angel	Room:	101	Capacity:	110
Find View All First 1-3 of 3 Last					
*Component Facility ID	Building	Room	Capacity		
ANGE0125A	Angel 125A	Angel	125A	20	+ -
ANGE0125B	Angel 125B	Angel	125B	20	+ -
ANGE0125C	Angel 125C	Angel	125C	20	+ -

Facility Component page

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

Component Facility ID

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

Defining Facility Characteristics

Access the Facility Characteristic page (Set Up SACR, Foundation Tables, Facilities, Facility Table, Facility Characteristic).

Facility TableFacility ComponentFacility Characteristic

Find | View AllFirst1 of 1Last

SetID:PSUNV

Facility ID:ANGE101Angel101

Effective Date:01/01/1900Status:Active

Building:AngelRoom:101Capacity:110

Room CharacteristicsFind | View AllFirst1-2 of 2Last

*Room Characteristic:04White Board

*Quantity:2

*Room Characteristic:15Biology Laboratory

*Quantity:3

Facility Black-out TimesFind | View 1First1-2 of 2Last

*Facility Black-Out Nbr1

*Start Time6:00AM

*End Time7:50AM

M☒

T☒

W☒

T☒

F☒

S☐

S☐

*Facility Black-Out Nbr2

*Start Time1:00PM

*End Time3:00PM

M☐

T☐

W☒

T☐

F☐

S☐

S☐

Facility Characteristic page

- Room Characteristic

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

Enter the quantity of the room characteristic. For example, enter 2 to indicate that the room has two white boards.
- Facility Black-Out Nbr
(facility black-out number)

You can define periods when a facility is unavailable. The facility blackout number is system-generated. This number indicates the number of blackout periods that exist for a facility. You can override the system-assigned facility blackout number.
- Start TimeandEnd Time

Enter a start and end time for the blackout period.
- M (Monday),T (Tuesday),W (Wednesday),T (Thursday),F (Friday),S (Saturday), andS (Sunday)

Select the days of the week for which the blackout period applies.

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

Designating Approved Instructors and Advisors

This section discusses how to:

- Assign faculty rank and advisor status.
- Designate approved course instructors.

Pages Used to Designate Approved Instructors and Advisors

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

Assigning Faculty Rank and Advisor Status

Access the Instructor/Advisor Table page (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Instructor/Advisor Table).

Instructor/Advisor Table		Approved Courses	
Raymond Reynolds		SR0499	
Instructor Details Find View All First 1 of 1 Last			
*Effective Date:	07/27/2004	*Status:	Active
*Instructor Type:	Assistant Professor	☐ Advisor	
*Academic Institution:	PSUNV	PeopleSoft University	
*Primary Acad Org:	ENGLISH	English	
*Instructor Available:	Available		
Instructor/Advisor Role Find View All First 1 of 1 Last			
Advisor Number:	1	Percent of Appointment:	
*Academic Career:	UGRD	Undergraduate	
Academic Program:	LAU	Liberal Arts Undergraduate	
Academic Plan:	ENGL-BA	English (BA)	
Academic Sub-Plan:			

Instructor/Advisor Table page

Instructor Type

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

Advisor

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

Academic Institution

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

Primary Acad Org (primary academic organization)

Select a primary academic organization for this instructor. Academic organization values are defined on the Academic Organization Table page.

Instructor Available

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

Instructor/Advisor Role

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

Advisor Number	The system populates this field with 1 by default. If an instructor advises students in more than one academic career, program, plan, or subplan, you can have multiple advisor numbers by adding rows.
Percent of Appointment	Enter a percent of appointment value that this instructor has for the indicated academic career, program, plan, and subplan. Instructors with dual appointments can have different percentages reflecting their responsibility. The total percentage must equal 100.
Academic Career	Select the academic career to which the instructor or advisor is linked. Academic career values are defined on the Academic Career Table page.
Academic Program	Select the academic program to which the instructor or advisor is linked. Academic program values are defined on the Academic Program Table component.
Academic Plan	Select the academic plan to which the instructor or advisor is linked. Academic plan values are defined on the academic plan pages.
Academic Sub-Plan	Select the academic subplan to which the instructor or advisor is linked. Academic subplan values are defined on the academic subplan pages.

Designating Approved Course Instructors

Access the Approved Courses page (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Approved Courses).

The screenshot displays the 'Approved Courses' page. At the top, there are two tabs: 'Instructor/Advisor Table' and 'Approved Courses'. Below the tabs, the user 'Raymond Reynolds' and course 'SR0499' are identified. The 'Instructor Details' section includes the following information:

- Effective Date:** 07/27/2004
- Status:** Active
- Instructor Type:** Assistant Professor
- Academic Institution:** PSUNV (PeopleSoft University)
- Primary Acad Org:** ENGLISH (English)

The 'Course Description' section features a table with the following columns: Seq Nbr, Acad Org, Subject Area, Course ID, Offer Nbr, Catalog Nbr, and Campus. The first row of the table shows '1' in the Seq Nbr column. Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible at the top of the table. Search icons are present next to the input fields for Acad Org, Subject Area, Course ID, Offer Nbr, and Catalog Nbr.

Approved Courses page

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

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

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

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

Defining Requirement Designations

To set up requirement designations, use the Requirement Designation Table component (RQ_DESIGNATION_TBL).

This section provides an overview of requirement designations and discusses how to define requirement designations.

Understanding Requirement Designations

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

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

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

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Course Lists"

Chapter 43, "Grading Students," page 1043

Page Used to Define Requirement Designations

Page Name	Definition Name	Navigation	Usage
Requirement Designation Table	RQ_DESIGNATION_TBL	Set Up SACR, Product Related, Student Records, Curriculum Management, Requirement Designation Table, Requirement Designation Table	Define requirement designations.

Defining Requirement Designations

Access the Requirement Designation Table page (Set Up SACR, Product Related, Student Records, Curriculum Management, Requirement Designation Table, Requirement Designation Table).

Requirement Designation Table

Requirement Designation: DSGN

Find | View All First 1 of 1 Last

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

*Description: Design Course

*Short Description: Design Cou

*Formal Description: Design Course

Academic Institution: PSUNV PeopleSoft University

Academic Plan:

☐ At Student's Option
 ☒ Separate Course Grade
☒ Catalog Print
 ☐ Schedule Print
☒ Print in Transcript
 ☐ Display in AA Reports

Requirement Designation Table page

Status

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

Description, Short Description, and Formal Description

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

Academic Institution

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

Academic Plan	Select an academic plan if you want to link the requirement designation to a specific plan. At enrollment, a student must be active in the specified plan to enroll in any class with the related requirement designation. The Enrollment Request 1 page includes overrides that enable you to override this general rule if you have the appropriate security permissions. On the Enrollment page, the system does not validate this.
At Student's Option	Select to indicate that the student can select the requirement designation at enrollment. You can indicate a student's choice of requirement designation on the Enrollment Request Page, the Student Enrollment 4 page, or the Block Enrl Detail 2 page. If you do not select this check box, students who enroll in classes that have this requirement designation are required to take the course and attempt the additional requirement designation credit. See Chapter 32, "Processing Class Enrollment Transactions," page 747.
Catalog Print	Select to enable the display of the formal description of the requirement designation and the course in the course catalog report. Note. The SSR_COURSE (Course Catalog) web service is one of a number of delivered Enrollment Web Services. The service operation SSR_GET_COURSES: Browse Course Catalog Summary obeys the Catalog Print setup that you select on the Requirement Designation Table page and on the Course Attributes page. For detailed information about Enrollment Web Services: See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide on My Oracle Support (Doc ID 1371391.1). See Chapter 36, "Using Enrollment Web Services," page 875.
Schedule Print	Select to enable the display of the formal description of the requirement designation and the course in the schedule of classes report.
Print in Transcript	Select to print the requirement designation and requirement designation grade on the student's transcript.

Separate Course Grade

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

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

See [Chapter 43, "Grading Students," Using the Grade Roster Page to Enter Grades, page 1047.](#)

Display in AA Reports

Select to enable the system to display the requirement designation code and description in the advisement report.

Setting Up Unit Conversions

To set up unit conversions, use the Unit Conversion Table component (UNIT_CONVR_TBL).

This section provides an overview of unit conversions, lists prerequisites, and discusses how to set up unit conversion rules within your institution.

Understanding Unit Conversions

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

Prerequisites

If you want to use term types other than the translate values that are delivered by PeopleSoft, you must first create them in the TERM_TYPE_CONVR_TO translate table.

Page Used to Set Up Unit Conversions

Page Name	Definition Name	Navigation	Usage
Unit Conversion Table	UNIT_CONVR_TBL	Set Up SACR, Product Related, Student Records, Enrollment, Unit Conversion Table, Unit Conversion Table	Set up unit conversions within your institution.

Setting Up Unit Conversion Rules within Your Institution

Access the Unit Conversion Table page (Set Up SACR, Product Related, Student Records, Enrollment, Unit Conversion Table, Unit Conversion Table).

Unit Conversion Table

SetID:PSUNV

Term Unit Type:S Semester Hours

Find | View AllFirst1 of 1Last

*Effective Date:01/01/1900

FindFirst1 of 1Last

*Term Type Convert ToUnit Multiplier

Quarter Hours1.5000

Unit Conversion Table page

- Term Type Convert To

Select the value to which you want to convert the value in the Term Unit Type field.
- Unit Multiplier

Enter the number for the system to use to multiply the term unit type units by to convert them to the term type convert to value, for example, (term unit type units) × (unit multiplier) = (term type convert to units).

Defining Standard Meeting Patterns

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

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Standard Class Meeting Patterns

Defining Modes of Instruction

To set up instruction modes, use the Instruction Mode component (INSTRUCT_MODE).

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

Page Used to Define Modes of Instruction

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Instruction Mode	INSTRUCT_MODE	Set Up SACR, Product Related, Student Records, Curriculum Management, Instruction Mode, Instruction Mode	Define instruction modes.

Defining Instruction Modes

Access the Instruction Mode page (Set Up SACR, Product Related, Student Records, Curriculum Management, Instruction Mode, Instruction Mode).

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

Effective Date and Status	The effective date determines when the status that you select is valid. The active effective date must be equal to or before the effective date of the course component to which you assign the instruction mode.
Description	Enter the description of the instruction mode. The system displays this value on the Course Catalog report and the Schedule of Classes report, as well as on the Course Catalog component and Schedule of Classes online pages.
Short Description	Enter a short description for the instruction mode.
Print On Course Catalog	Select to display the instruction mode on the course catalog report.

- Print On Schedule of Classes** Select to display the instruction mode description on the schedule of classes report, as well as on the online schedule of classes.
- Print On Transcript** No programming is attached to this field.

Chapter 5

Setting Up Repeat Checking

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

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

Understanding Repeat Checking Functionality

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

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

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

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

- The Allowable Repeats process, which enables you to define rules on the Catalog Data page of the Course Catalog (CRSE_CATALOG) component that regulate whether a student can repeat a course or course topic for credit and, if so, how many total units and total completions the student can attempt.

In conjunction with this setting at the course catalog level, you can define by grade (Repeat Checking Option) or by existing repeat code (Count and Process Option) if a class is defined as an allowable repeat.

- The Repeat Checking process, which takes effect only after a student exceeds either repeat maximum in the course catalog.

You can also define by grade (Repeat Grade Option) or by existing repeat code (Count and Process Option) if a class should be processed by the repeat check engine.

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

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

Repeat codes can adjust academic statistics in the following ways: they prevent the system from including repeated coursework in a student's grade point average (GPA) and they prevent the system from including repeated coursework in a student's academic level. You can also decide to not adjust statistics for previously assigned repeat codes.

- *Repeat rules* are defined by academic careers and assigned to academic programs. The rules are analyzed during the repeat checking process and appropriate repeat codes are then assigned to the student enrollment record.

Repeat rules inform the Repeat Checking process when a student's repeated coursework matches the repeat policy of an academic career or an academic program. The Repeat Checking process then assigns the appropriate repeat codes to the student's enrollment record.

After you define these elements, you must link the repeat rules to academic careers. These rules carry to the academic program unless you make a different repeat rule assignment at that level. You can assign to academic careers and academic programs only the repeat rules that are valid for the repeat scheme of the academic career. Finally, you must specify when you want the Repeat Checking process to run at the academic institution, academic career, and academic program levels. These controls enable you to turn on and off automatic repeat checking during enrollment and grade input. They also enable you to temporarily suspend automatic repeat checking during peak enrollment and grade input periods.

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

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

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

- You must process the enrollment transaction through the enrollment engine.

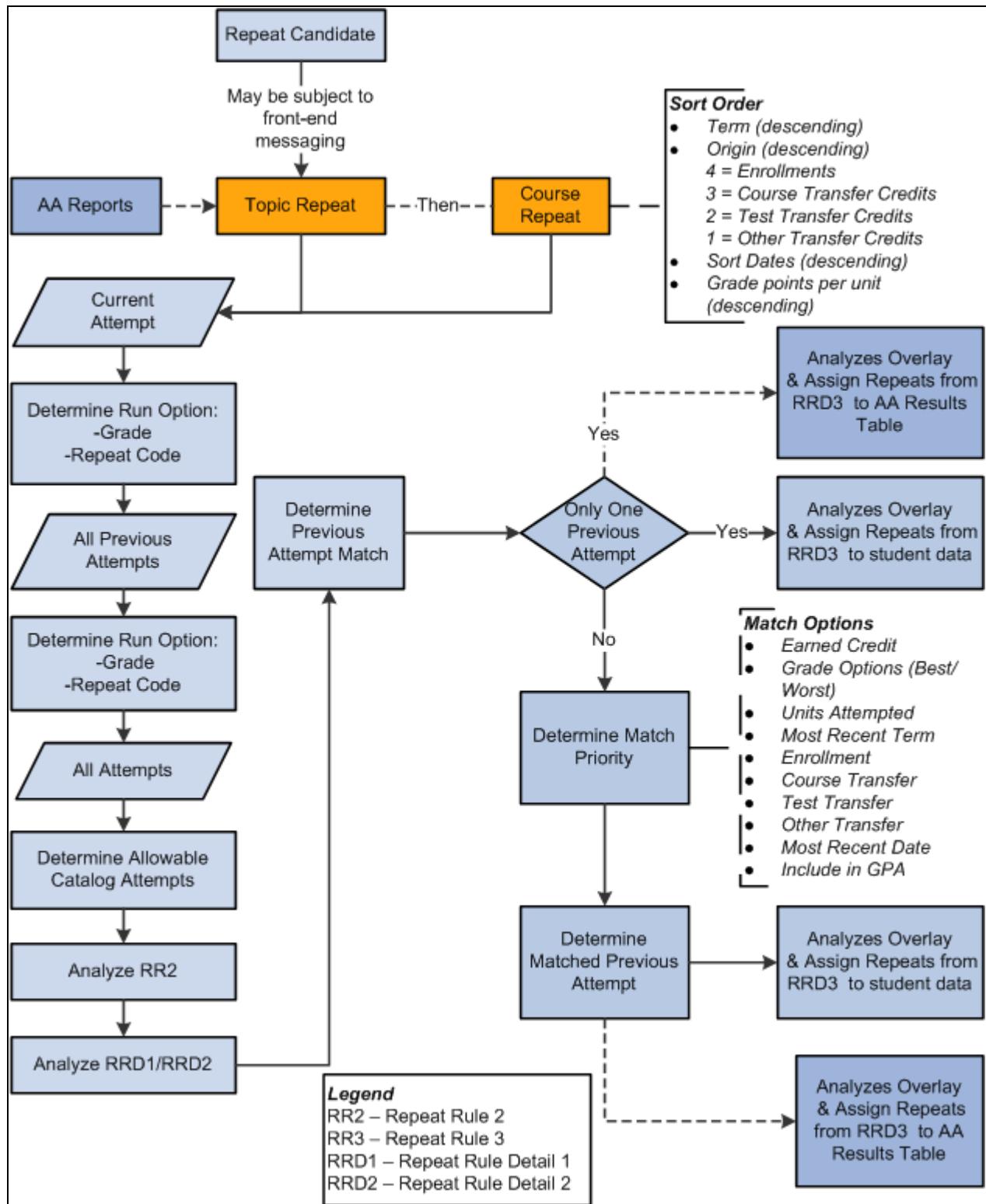
The COBOL process does not validate enrollment transactions that are processed through the Enrollment (STDNT_ENRL) component and, therefore, does not issue a warning repeat message. For enrollment transactions that are processed through the Enrollment component, the system sets the repeat candidate flag on the student's enrollment record to *N*, even for repeated classes.

On the Repeat/Incomplete page of the Academic Program Table (ACADEMIC_PROG_TBL) component, if you set the Process on Enrollment field to *No* and the Course Catalog Repeat Messages field to *Warning*, the Allowable Repeats process is activated. When students submit enrollment requests and the student exceeds the total completions allowed for the class, as determined by the Course Catalog Detail page, they receive a warning message.

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

For the process to correctly and consistently set the repeat candidate flag to *Y*, you must set the Enrollment Message field to *Warning* for the repeat rule on the Repeat Rule2 page and for every detail rule on the Repeat Rule Detail 1 page. If you set the Enrollment Message field to *Ignore*, the process does not send a message for that rule and, even if the course is a repeat candidate, the process sets the repeat candidate flag to *N*, provided that it does not violate other repeat rules.

This diagram explains the Repeat Engine logic:



Repeat Engine logic

See Also

Chapter 23, "Performing Repeat Checking," page 533

Defining Repeat Schemes and Repeat Codes

To set up repeat schemes and codes, use the Repeat Scheme Table (REPEAT_SCHEME_TBL) component.

This section discusses how to create repeat schemes and codes.

Page Used to Define Repeat Schemes and Repeat Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Repeat Scheme Table	REPEAT_SCHEME_TBL	Records and Enrollment, Term Processing, End of Term Processing, Repeat Scheme Table, Repeat Scheme Table	Create repeat schemes and the repeat codes within each scheme.

Creating Repeat Schemes and Codes

Access the Repeat Scheme Table page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Scheme Table, Repeat Scheme Table).

Repeat Scheme Table

SetID: PSUNV Repeat Scheme: UGRD

Find | View All 1 of 1

*Effective Date: 01/01/1900 31

*Status: Active

*Description: Undergraduate *Short Desc: PSU

Find | View All 1 of 22

*Repeat Code: EXCM

*Description: Repeated - Excluded *Short Desc: Repeated

Formal Description: Repeated - Excluded

☐ Earn Credit

☐ Include in GPA

☒ Print Repeat Description

☒ Print Repeat Date

*Units Attempted: Yes

☐ Display in AA Reports

When this code exists in student data

*Count and Process Option: 1) Count = Y Process = Y

☒ Allow to be overlaid

☐ Bypass processing if it is on Current Attempt

Repeat Scheme Table page

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

Repeat Code

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

Earn Credit

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

Include in GPA (include in grade point average)

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

Print Repeat Description	Select to have the system print the formal description of this repeat code on the student's transcript when applicable.
Print Repeat Date	Select to print the date that the student completed the repeated course on the student's transcript.
Units Attempted	From the following choices, enter a value to indicate how the units attempted from a repeated course count towards a student's academic statistics when this repeat code is assigned to the student's class enrollment record. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require substantial programming. <i>Yes:</i> Indicates that a student with this repeat code on a class enrollment record can have the class included in units attempted. <i>No:</i> Prevents the units from a repeated course from counting toward a student's academic statistics. <i>In Progress:</i> Units in progress will be used for courses coded with this repeat code.
Display in AA Reports (display in Academic Advisement reports)	Select to allow the system to display the repeat code and its description in the advisement report.

When this code exists in student data

Count and Process Option	Select an option to indicate whether a class with this repeat code should be counted as a repeat candidate and whether the class should be processed by the Repeat Checking process. Values are: 1) <i>Count = Y Process = Y:</i> If you select this option, any class with this repeat code is counted in the pool of repeat attempts and is selected and processed when the Repeat Checking process is run. 2) <i>Count = Y Process = N:</i> If you select this option, any class with this repeat code is counted in the pool of repeat attempts, but is not selected and processed when the Repeat Checking process is run. 3) <i>Count = N Process = Y:</i> If you select this option, any class with this repeat code is not counted in the pool of repeat attempts, but is selected and processed when the Repeat Checking process is run. 4) <i>Count = N Process = N:</i> If you select this option, any class with this repeat code is not counted in the pool of repeat attempts, nor is it selected and processed when the Repeat Checking process is run.

Note. The Repeat Checking process analyzes the value in the Repeat Checking Option field on the Grading Scheme Table page before it analyzes the value in the Count and Process Option field on this page.

See Chapter 5, "Setting Up Repeat Checking," *Understanding Repeat Checking Functionality*, page 47.

Allow to be overlaid	Select this check box to allow the Repeat Checking process to overlay this repeat code in subsequent process runs. Clear the check box if this repeat code should never be replaced.
Bypass processing if it is on Current Attempt	Select this check box if the current attempt already has this code assigned and the class should not be picked up by the Repeat Checking process.

Defining Repeat Rules

To set up repeat rules, use the Repeat Rule (REPEAT_RULE) component.

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

- Describe repeat rules.
- Define conditions for repeat rules.
- Define the criteria and order that are used to determine a match when three or more repeat candidates are processed.
- Define repeat rule sequences.
- Define conditions for repeat rule sequences.
- Designate process actions for repeat rule sequences.

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

Pages Used to Define Repeat Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Repeat Rule	REPEAT_RULE	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule	Describe the repeat rules that you will later link to academic careers and academic programs.

Page Name	Definition Name	Navigation	Usage
Repeat Rule2	REPEAT_RULE2	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule2	Define the total attempts and units that are allowed for a course to which the repeat rule applies. You define the repeat code that is assigned to the student enrollment if the defined attempts or units are exceeded. You establish how the enrollment engine notifies a student when this violation occurs. Lastly you can define if there are any repeat codes that are exempted from the attempts and units allowed totals.
Repeat Rule3	REPEAT_RULE3	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule3	Select the criteria and the order that are used by the Repeat Checking process to determine a match between the current attempt and multiple previous attempts.
Repeat Rule Detail 1	REPEAT_RULE_DTL	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 1	Further define a rule when your institution restricts the number of times that a student can repeat a course within a certain grade range. This page describes the <i>previous</i> course in the matched pair of repeat courses. For example, a student can repeat courses with F or D grades (grade points between 0.00 and 1.999) only twice.
Repeat Rule Detail 2	REPEAT_RULE_DTL2	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 2	Define what the repeat checking rule should do, based on the value of a preexisting repeat code on the current course attempt.
Repeat Rule Detail 3	REPEAT_RULE_DTL3	Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 3	Designate the codes that the Repeat Checking process should assign to the enrollment records of both the current and previous course attempts.

Describing Repeat Rules

Access the Repeat Rule page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule).

Repeat RuleRepeat Rule2Repeat Rule3Repeat Rule Detail 1Repeat Rule Detail 2Repeat Rule Detail 3

Academic Institution:PSUNVPeopleSoft University

Academic Career:UGRDUndergraduate

Find | View AllFirst2 of 6Last

'Repeat Rule:UNDERGRD

'Effective Term:06502010 Fall

'Description:Undergraduate Repeat Rule'Short Description:Undergrd

'Long Description:Undergraduate Repeat Rule

Repeat Rule page

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

- Repeat Rule

Enter the code for this repeat rule. You can attach this code to academic careers on the Repeat Checking page (Academic Career Table (ACAD_CAREER_TBL) component) and to academic programs on the Repeat/Incomplete page (Academic Program Table component).
- Effective Term

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

Defining Conditions for Repeat Rules

Access the Repeat Rule2 page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule2).

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:		PSUNV		PeopleSoft University							
Academic Career:		UGRD		Undergraduate							
Find View All First 2 of 6 Last											
Repeat Rule:		UNDERGRD		Effective Term:		0650		2010 Fall		+ -	
Total Attempts Allowed:		99									
Total Units Allowed:											
Repeat Code Violated:		ILGL		Illegal Repeat							
Enrollment Message:		Ignore									
Current Repeat Codes Exempted from Attempts/Units Allowed											
1) GRFR		Exception/Grandfather Clause		5)							
2) PETM		Repeat Allowed via Petition		6)							
3)				7)							
4)				8)							

Repeat Rule2 page

Total Attempts Allowed

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

Total Units Allowed

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

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

Note. If your institution restricts only the number of times or units that a student can repeat a course *within a certain grade point range*, use the Repeat Rule Detail 1 page to set these restrictions.

Repeat Code Violated

Enter the repeat code that the Repeat Checking process assigns to a student's enrollment record if the student exceeds the defined attempts or units.

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

If your organization chooses to have no restriction on the number of times a student can repeat a course, use the total attempts allowed default value of 99.

You must enter a Repeat Code Violated value.

Enrollment Message

You can define how the Repeat Checking process alerts a student during enrollment if the student exceeds the total attempts or units allowed:

- Select *Error* to stop the enrollment process and alert the student by displaying an error message.
- Select *Warning* to alert the student by displaying a warning message about the possible consequences of continuing with the enrollment.
- Select *Ignore* if you do not want the Repeat Checking process to issue a message.

The enrollment message applies only to repeat checking on enrollment (front end).

Current Repeat Codes Exempted from Attempts/Units Allowed

Use this field to ensure that a repeat code on the current attempt is not counted in the total attempts or units if it is manually assigned during the enrollment process.

In the above example, if you set PETM as the repeat code on the current attempt, the class will be exempt from exceeding the defined total attempts or units.

You can assign repeat codes to a student's enrollment record on the Enrollment Request, Quick Enrollment, or Student Enrollment 1 page.

Defining the Criteria and Order That are Used to Determine a Match When Three or More Repeat Candidates are Processed

Access the Repeat Rule3 page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule 3).

Repeat Rule	Repeat Rule2	Repeat Rule3	Repeat Rule Detail 1	Repeat Rule Detail 2	Repeat Rule Detail 3
Academic Institution: PSUNV PeopleSoft University Academic Career: UGRD Undergraduate					
Find View All First 2 of 6 Last					
Repeat Rule: UNDERGRD Effective Term: 0650 2010 Fall					
Prior Attempt Match Priority					
1st	Earn Credit Flag = Y				
2nd	Best Grade Points Per Unit				
3rd	Units Attempted = Y				
4th	Most Recent Term				
5th	From Enrollment				
6th	From Course Transfer Credit				
7th	From Test Transfer Credit				
8th	From Other Transfer Credit				
9th	Most Recent Date				
10th					

Repeat Rule 3 page

Use the Repeat Rule 3 page to define the criteria and the order that are used by the Repeat Checking process to determine which previous attempt should be matched with the current attempt. This criteria will be processed only when multiple previous attempts exist.

Prior Attempt Match Priority Select the process order in which you want the Repeat Checking process to identify the class to be matched with the current attempt. The selected class is assigned the Set Prior Attempt value that is defined on the Repeat Rule Detail 3 page.

Select up to ten processing options to indicate the order in which you want the Repeat Checking process to find a prior attempt match. This logic is invoked only when the student has two or more previous repeat candidates for the class. The process stops when it finds a class that meets the criteria or it finds a blank value in the Prior Attempt Match Priority field.

The processing options are:

- *Earn Credit Flag = Y*
- *Best Grade Points Per Unit or Worst Grade Points Per Unit*
- *Units Attempted = Y*
- *Most Recent Term*
- *From Enrollment*
- *From Course Transfer Credit*
- *From Test Transfer Credit*
- *From Other Transfer Credit*
- *Most Recent Date*
- *Include in GPA = Y*

You can change the order of the criteria to meet the requirements of your institution.

Note. Regardless of the order that you select for the Prior Attempt Match Priority field, when the Repeat Checking process utilizes either the *Best Grade Points Per Unit* or *Worst Grade Points Per Unit* options, it matches only on classes for which the Earn Credit flag = Y.

Note. When multiple previous attempts exist, the Repeat Checking process invokes the default criteria order to find a match if only minimal criteria are defined—for example, if only From Course Transfer Credit is listed and no match exists, the remaining criteria are processed in default order until a match is found.

Defining Repeat Rule Sequences

Access the Repeat Rule Detail 1 page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 1).

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:		PSUNV		PeopleSoft University							
Academic Career:		UGRD		Undergraduate							
Find View All First 2 of 8 Last											
Repeat Rule:		UNDERGRD		Effective Term:		0650		2010 Fall			
Find View All First 1 of 1 Last											
Repeat Rule Sequence											
'Seq. No:	1										
Grade Points:	0.000			Through:		4.000					
Total Attempts Allowed:	99			Total Units Allowed:							
Repeat Code Violated:	ILGL			Illegal Repeat							
Enrollment Message:	Ignore										
'Description:	Special Permission										
'Long Description:	Special permission to repeat course										

Repeat Rule Detail 1 page

Seq No (sequence number)

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

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

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

Grade Points

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

Through

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

For example, at PSUNV we use a 4 point grade scale. To apply a detail line to the grade of F, we would enter Grade Points *0.000* and Through *0.999*. To apply the detail line to all grades we would enter Grade Points *0.000* and Through *4.000*.

Total Attempts Allowed

Enter the number of attempts that a student is allowed within this grade point range. This number includes the original attempt and repeat attempts. The value that you enter should include all attempts of the course, including the first attempt.

Total Units Allowed

Enter the total units for which a student is allowed to receive a grade within this grade point range. The value that you enter should include all units taken for the course, including the units of the first attempt.

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

Repeat Code Violated

Enter the repeat code that the Repeat Checking process assigns to a student's enrollment record if the student exceeds the defined attempts or units of this detail line of the repeat rule.

For example, if your organization allows students to repeat a course only twice, within a certain grade point range, you would enter 3 in the Total Attempts Allowed field—one for the initial enrollment plus two additional repeated attempts. Then, if the student attempts to enroll in the course a fourth time and violates the total attempts allowed for the rule, the process assigns the Repeat Code Violated field value to the course. If your organization has no restriction on the number of times that a student can repeat a course within a certain grade point range, use the Total Attempts Allowed default value of 99.

You must enter a Repeat Code Violated field value.

Enrollment Message

You can define how the Repeat Checking process alerts a student during enrollment if the student exceeds the total attempts or units allowed of this detail line of the repeat rule:

- Select *Warning* to alert the student by displaying a warning message about the possible consequences of continuing with the enrollment.
- Select *Ignore* if you do not want the Repeat Checking process to issue a message.

The enrollment message applies only to repeat checking on enrollment (front end).

Defining Conditions for Repeat Rule Sequences

Access the Repeat Rule Detail 2 page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 2).

Repeat Rule Detail 2 page

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

Ignore

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

Must Equal

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

In this example, for Seq. No 1 of the Repeat Rule Detail 1 page to be applied, the current attempt of the course must already have repeat code GRFR assigned.

Designating Process Actions for Repeat Rule Sequences

Access the Repeat Rule Detail 3 page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Rule, Repeat Rule Detail 3).

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:	PSUNV	PeopleSoft University									
Academic Career:	UGRD	Undergraduate									
Find View All 6 of 6											
Repeat Rule:	UNDERGRD	Effective Term:	0650 2010 Fall								
Find View All 1 of 1											
Seq. No: + -											
If Current Attempt is Best Grade											
Set Current Attempt:	GPAI	Repeat for GPA Improvement									
Set Prior Attempt:	EXCM	Repeated - Excluded									
If Prior Attempt is Best Grade											
Set Current Attempt:	GPAI	Repeat for GPA Improvement									
Set Prior Attempt:	EXCM	Repeated - Excluded									
If Current and Prior Attempt Grades are the same											
Set Current Attempt:	GPAI	Repeat for GPA Improvement									
Set Prior Attempt:	EXCM	Repeated - Excluded									

Repeat Rule Detail 3 page

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

Set Current Attempt Enter a repeat code for the current attempt. The Repeat Checking process assigns the repeat code that you select here to the student's current attempt of the course.

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

If Current Attempt is Best Grade

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

If Prior Attempt is Best Grade

In the If Prior Attempt is Best Grade group box, select the appropriate repeat codes for the system to post to a student's enrollment record if the prior attempt of the course has the best grade.

If Current and Prior Attempt Grades are the same

In the If Current and Prior Attempt Grades are the same group box, select the appropriate repeat codes for the system to post to a student enrollment record when the current and prior attempt grades are the same.

Examples of Multiple Repeat Matching

If multiple repeated courses are counted, the prior attempt that is selected to match with the current attempt is determined by the setup on the Repeat Rule 3 page.

The following options are available:

- Earn Credit Flag = Y
- Best Grade Points Per Unit *or*
- Worst Grade Points Per Unit
- Units Attempted = Y
- Include in GPA = Y
- Most Recent Term
- From Enrollment
- From Course Transfer Credit
- From Test Transfer Credit
- From Other Transfer Credit
- Most Recent Date

Note. In certain scenarios, certain options are inserted into the logic: best/worst grade matches are based on the earn credit flag = Y and the most recent date is analyzed if more than one of the same Most Recent Term exist.

Here are some scenarios in which the following repeat codes are assigned:

- EXCM (Earned Credit and Include in GPA = N)
- GPAI (Earned Credit and Include in GPA = Y)
- PETM (Earned Credit and Include in GPA = Y). Setup to not be overlaid.

Example 1

The course is set up in the course catalog to allow credit for two repeats:

- Fall 2006, grade C
- Fall 2007, grade D
- Fall 2008, grade B

Scenario 1 - Best Grade

According to school policy, the student can retake the course an unlimited number of times. No limits exist on the Repeat Rule 1 or Repeat Rule Detail 1 setup.

The course that is selected as the previous course attempt is the course with the best grade points per unit where the Earn Credit check box is selected on STDNT_ENRL. In this example, the Fall 2008 attempt is the current attempt, while Fall 2006 is selected as the previous attempt.

Based upon the Repeat Rule Detail 3 setup (If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned:

- Fall 2006, grade C EXCM
- Fall 2007, grade D
- Fall 2008, grade B GPAI

Scenario 2 - Worst Grade

The course that is selected as the previous course attempt is the course with the worst grade points per unit where the Earn Credit check box is selected on STDNT_ENRL. In this example, the Fall 2008 attempt is the current attempt, while Fall 2007 is selected as the previous attempt.

Based upon the Repeat Rule Detail 3 setup (If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned:

- Fall 2006, grade C
- Fall 2007, grade D EXCM
- Fall 2008, grade B GPAI

The student takes the class again with an A grade. Again the course that is selected as the previous course attempt is the course with the worst grade points per unit where the Earn Credit check box is selected on STDNT_ENRL. In this example, the Fall 2009 attempt is the current attempt, while Fall 2006 is selected as the previous attempt (because Fall 2007 has the Earn Credit flag = N due to the existing EXCM code).

Here is how the enrollment records for this example would look:

- Fall 2006, grade C EXCM
- Fall 2007, grade D EXCM
- Fall 2008, grade B GPAI
- Fall 2009, grade A GPAI

Example 2

The course is set up in the course catalog for no allowable repeats:

- Fall 2006, grade C
- Fall 2007, grade D

Scenario 1 – Most Recent Term

According to school policy, the student can retake a course an unlimited number of times, but only the latest attempt counts.

Because the Most Recent Attempt option disregards the Earn Credit flag on STNDT_ENRL, this setting always compares with the most recent attempt.

Based on the Repeat Rule Detail 3 setup (If Prior Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned:

- Fall 2006, grade C EXCM
- Fall 2007, grade D GPAI

The student takes class Fall 2008, grade A. Fall 2008 is considered the current attempt and Fall 2007 is the Most Recent Attempt. Based upon the Repeat Rule Detail 3 setup (If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned as follows because the school policy always counts the latest attempt:

- Fall 2006, ENGL 101, grade C EXCM
- Fall 2007, ENGL 101, grade D EXCM
- Fall 2008, ENGL 101, grade A GPAI

The student takes class Fall 2009, grade B. Fall 2009 is considered the current attempt and Fall 2008 is the Most Recent Attempt. Based upon the Repeat Rule Detail 3 setup (If Prior Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned as follows because the school policy always counts the latest attempt:

- Fall 2006, ENGL 101, grade C EXCM
- Fall 2007, ENGL 101, grade D EXCM
- Fall 2008, ENGL 101, grade A EXCM
- Fall 2009, ENGL 101, grade B GPAI

Scenario 2 – *Most Recent Term with repeat code to not be overlaid*

School policy (as defined on Repeat Rule Detail 1) does not allow a repeat on grade points < 2.000, but the student petitions and receives permission. The following repeat codes are manually assigned after the student completes Fall 2007:

- Fall 2006, grade D EXCM
- Fall 2007, grade C PETM

The student takes class Fall 2008, grade A. Fall 2008 is considered the current attempt and Fall 2007 is the prior attempt. The Repeat Rule Detail 3 is setup as If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM. While it still matches on Fall 2007, because the PETM is not to be overridden, the repeat codes are assigned as follows:

- Fall 2006, ENGL 101, grade C EXCM
- Fall 2007, ENGL 101, grade D PETM
- Fall 2008, ENGL 101, grade A GPAI

Scenario 3 – *Most Recent Term – Multiple Same Terms exist – Most Recent Date*

When multiples of the same Most Recent Term exist, the repeat engine analyzes the session start dates to determine the Most Recent Date.

- Summer 2006, grade D (session 1 – June 1 start date)
- Summer 2006, grade D (session 2 – July 5 start date)

Because the start date of session 2 is the most recent date, it is determined to be the current attempt while session 1 which has an earlier start date is considered the prior attempt. Based on the Repeat Rule Detail 3 setup (If Current and Prior Attempt are Same Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned:

- Summer 2006, grade C (session 1 – June 1 start date) EXCM
- Summer 2006, grade D (session 2 – July 5 start date) GPAI

Student takes class Fall 2008, grade A. Fall 2008 is considered the current attempt and Summer 2006 session 2 is the prior attempt (based on the Most Recent Date). Based on the Repeat Rule Detail 3 setup (If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned as follows because the school policy always counts the latest attempt:

- Summer 2006, grade C (session 1 – June 1 start date) EXCM
- Summer 2006, grade D (session 2 – July 5 start date) EXCM
- Fall 2008, ENGL 101, grade A GPAI

Note. When Most Recent Date is used as a criteria, the session start date is the first determiner. If the start dates are the same, then the session end dates are used as the determiner.

Scenario 4 – *Most Recent Term – Enrollment before Transfer*

According to school policy, the most recent attempt is always counted, but internal enrollments are counted before transfer credit. To accommodate such a policy the repeat checking matching option might be setup as follows:

- Most Recent Term
- From Enrollment

When multiples of the same Most Recent Term exist, the repeat engine analyzes the session start dates to determine the Most Recent Date.

- Fall 2006, grade C (session 1) Enrollment
- Fall 2006, grade C (session 1) Transfer Credit

Based on the Repeat Rule Detail 3 setup (If Current and Prior Attempt are Same Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned:

- Fall 2006, grade C (session 1) Enrollment GPAI
- Fall 2006, grade C (session 1) Transfer Credit EXCM

Student takes class Fall 2008, grade A. Fall 2008 is considered the current attempt and Fall 2006 session 1 Enrollment is the prior attempt. Based on the Repeat Rule Detail 3 setup (If Current Attempt is Best Grade - Current = GPAI, Prior = EXCM), the repeat codes are assigned as follows because the school policy always counts the latest attempt:

- Fall 2006, grade C (session 1) Enrollment EXCM
- Fall 2006, grade C (session 1) Transfer Credit EXCM
- Fall 2008, grade A GPAI

See Also

[Chapter 23, "Performing Repeat Checking," Running the Repeat Rule Checking Process in Batch, page 535](#)

Example of a Repeat Rule

The following example shows how your institution might set up a repeat rule with two detail lines. This example defines a repeat rule that allows students to repeat a course twice only or earn up to 12 units in a repeated course. In addition, students must seek special permission to repeat classes. If students receive a D or F in the course, they can repeat the course only once rather than twice. The Repeat Rule2 page might look like this:

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:	PSUNV	PeopleSoft University									
Academic Career:	UGRD	Undergraduate									
Find View All First 2 of 6 Last											
Repeat Rule:	UNDERGRD	Effective Term:	0650	2010 Fall							
Total Attempts Allowed:	3										
Total Units Allowed:	12.00										
Repeat Code Violated:	ILGL		Illegal Repeat								
Enrollment Message:	Warning										
Current Repeat Codes Exempted from Attempts/Units Allowed											
1)	PETM	Repeat Allowed via Petition		5)							
2)				6)							
3)				7)							
4)				8)							

Example repeat rule (1 of 7)

- The Total Attempts Allowed field is set to 3.

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

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

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

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

If the Repeat Checking process identifies the repeat on enrollment as exceeding the total attempts allowed or total units allowed, it issues a warning message to alert the student about the possible consequences of continuing with the enrollment.

- We enter a repeat code exemption.

If a student's current term enrollment contains the *PETM* (repeat allowed via petition) repeat code, the repeat rule does not prevent the enrollment—this exemption would also override the total attempts allowed or total units allowed maximums on the Repeat Rule2 page during back-end processing. For the student's enrollment to contain this repeat code, manually assign it to the enrollment record on the Student Enrollment 1 page, the Quick Enrollment page, or the Enrollment Request page. In addition, the assumption is that the exemption codes are included in special permission rules where these codes are established as Must Equal conditions on the Repeat Rule Detail 2 page, though this is not required.

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

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:	PSUNV	PeopleSoft University									
Academic Career:	UGRD	Undergraduate									
Find View All First 2 of 6 Last											
Repeat Rule:	UNDERGRD	Effective Term:	0650	2010 Fall							
Find View All First 1 of 1 Last											
Repeat Rule Sequence											
'Seq. No:	1										
Grade Points:	0.000	Through:	4.000								
Total Attempts Allowed:	99	Total Units Allowed:									
Repeat Code Violated:	ILGL	Illegal Repeat									
Enrollment Message:	Ignore										
'Description:	Special Permission										
'Long Description:	Special permission to repeat course										

Example repeat rule (2 of 7)

- The sequence number is 1.

The Repeat Checking process considers this detail line first.

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

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

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

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

- No total units allowed restriction exists for this detail line of the repeat rule.

The Repeat Rule Detail 2 page might look like this for the special permission detail line:

Repeat Rule Repeat Rule2 Repeat Rule3 Repeat Rule Detail 1 **Repeat Rule Detail 2** Repeat Rule Detail 3

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate

Find | View All First 2 of 6 Last

Repeat Rule: UNDERGRD **Effective Term:** 0650 2010 Fall

Find | View All First 1 of 1 Last

Seq. No: 1 ☐ Ignore ☒ **Must Equal**

Current Repeat Codes For Ignore/Must Equal Condition

1) PETM	Repeat Allowed via Petition	5)
2)		6)
3)		7)
4)		8)

Example repeat rule (3 of 7)

The Repeat Checking process applies the codes on the Repeat Rule Detail 3 page if the current course attempt has been coded with *PETM*. The Rule Detail 3 page might look like this for the special permission detail line:

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:		PSUNV		PeopleSoft University							
Academic Career:		UGRD		Undergraduate							
Find View All 2 of 6											
Repeat Rule:		UNDERGRD		Effective Term:		0650 2010 Fall					
Find View All 1 of 1											
Seq. No:		1									
If Current Attempt is Best Grade											
Set Current Attempt:		REXC		Repeated - Excluded from Stats							
Set Prior Attempt:		REIG		Repeated - Included in GPA							
If Prior Attempt is Best Grade											
Set Current Attempt:		REIG		Repeated - Included in GPA							
Set Prior Attempt:		REXC		Repeated - Excluded from Stats							
If Current and Prior Attempt Grades are the same											
Set Current Attempt:		REXC		Repeated - Excluded from Stats							
Set Prior Attempt:		REIG		Repeated - Included in GPA							

Example repeat rule (4 of 7)

- If the current attempt of the class has the best grade, the system codes that class with *REXC* and sets the prior attempt to *REIG*.
- If the prior attempt of the class has the best grade, the system codes that class with *REXC* and sets the current attempt to *REIG*.
- If the current and prior attempt have the same grade, the system codes the current attempt as *REXC* and the prior attempt as *REIG*.

If the current course attempt does not meet the criteria (current attempt has PETM) then the program moves to the next sequence detail line.

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

Repeat Rule		Repeat Rule2		Repeat Rule3		Repeat Rule Detail 1		Repeat Rule Detail 2		Repeat Rule Detail 3	
Academic Institution:		PSUNV		PeopleSoft University							
Academic Career:		UGRD		Undergraduate							
Find View All First 2 of 8 Last											
Repeat Rule:		UNDERGRD		Effective Term:		0650		2010 Fall			
Find View All First 2 of 2 Last											
Repeat Rule Sequence											
'Seq. No:		2									
Grade Points:		0.000		Through:		1.999					
Total Attempts Allowed:		2		Total Units Allowed:							
Repeat Code Violated:		ILGL		Illegal Repeat							
Enrollment Message:		Warning									
'Description:		Repeat Ds and Fs									
'Long Description:		Ds and Fs may be repeated only once (two total attempts)									

Example repeat rule (5 of 7)

- The sequence number is 2.

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

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

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

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

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

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

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

Repeat Rule

Repeat Rule2

Repeat Rule3

Repeat Rule Detail 1

Repeat Rule Detail 2

Repeat Rule Detail 3

Academic Institution:

PSUNV

PeopleSoft University

Academic Career:

UGRD

Undergraduate

Find

View All

First

2 of 6

Last

Repeat Rule:

UNDERGRD

Effective Term:

0650

2010 Fall

Find

View All

First

2 of 2

Last

Seq. No:

2

Ignore

Must Equal

Current Repeat Codes For Ignore/Must Equal Condition

1)

EXCM

Repeated - Excluded

5)

2)

RATT

Repeat Forgiveness Attempt

6)

3)

RFCP

Repeat Forgiveness - Included

7)

4)

RFAT

Repeat Forgiveness - Excluded

8)

Example repeat rule (6 of 7)

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

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

Repeat Rule	Repeat Rule2	Repeat Rule3	Repeat Rule Detail 1	Repeat Rule Detail 2	Repeat Rule Detail 3
Academic Institution: PSUNV PeopleSoft University Academic Career: UGRD Undergraduate					
Find View All 2 of 6					
Repeat Rule: UNDERGRD Effective Term: 0650 2010 Fall					
Find View All 1 of 1					
Seq. No: + -					
If Current Attempt is Best Grade					
Set Current Attempt: GPAI Repeat for GPA Improvement Set Prior Attempt: RINC Replaces Previous Attempt					
If Prior Attempt is Best Grade					
Set Current Attempt: GPAI Repeat for GPA Improvement Set Prior Attempt: RINC Replaces Previous Attempt					
If Current and Prior Attempt Grades are the same					
Set Current Attempt: GPAI Repeat for GPA Improvement Set Prior Attempt: RINC Replaces Previous Attempt					

Example repeat rule (7 of 7)

Note. When the Repeat Checking process finds a matched pair of courses that violates a detail line of the repeat rule, it moves on to the next pair of matching courses.

Setting Up Repeat Checking for Academic Institutions

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

Page Used to Set Up Repeat Checking for Academic Institutions

Page Name	Definition Name	Navigation	Usage
Academic Institution 5	INSTITUTION_TABLE5	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 5	Set repeat checking controls for academic institutions. Academic institution level is the highest level of control for the automatic Repeat Checking process.

Setting Repeat Checking Controls for Academic Institutions

Access the Academic Institution 5 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 5).

Academic Institution 4		Academic Institution 5		Academic Institution 6		Academic Institution 7	
Academic Institution:		PSUNV		PeopleSoft University			
				Find View All		First 2 of 2 Last	
Effective Date:		01/01/1900		Status:		Active	
Repeat Check							
Process on Enrollment:		No		☐ Temporarily Suspend Repeat Check on Enrollment			
Repeat Grade Check:		Never		☐ Temporarily Suspend Repeat Check on Grade Input			
Process on Transfer Credit:		☒					
Repeat Check at Topic Level:		☐					
Capture Repeat Assignment Date							
		☒ On Enrollment Process					
		☐ On Repeat Process					
Grade Match Option:		Best grade					
Academic Program Options							
		☒ Select Acad Prog During Enroll					

Academic Institution 5 page

Process on Enrollment

Use this field to activate or deactivate the automatic Repeat Checking process at enrollment time (front-end processing) for this entire academic institution. Enter one of the following values.

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

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

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

Repeat Grade Check

Use this field to activate or deactivate repeat checking on grade input for this entire academic institution. The available values are:

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

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

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

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

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

Temporarily Suspend Repeat Check on Enrollment

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

Temporarily Suspend Repeat Check on Grade Input

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

Process on Transfer Credit

When you post on line or batch transfer credit, use this check box to include or exclude the Repeat Checking process. The check box is selected by default.

Note. If the value in the Scope field on the Repeat Checking page is *All Work for Term* or *Transfer/Test Credit*, the Repeat Checking process assigns repeat codes to transfer credit even though the Process on Transfer Credit check box is *not* selected.

If you do not want to run repeat checking on transfer credit, clear the Process on Transfer Credit check box and enter a value of *Student Enrollments Only* in the Scope field on the Repeat Checking page.

Repeat Check at Topic Level

Select if you want to enable repeat checking at the course topic level for this institution. Define repeat rules in the Repeat Rules component. You can disable repeat checking at the course topic level for a specific course on the Course Catalog - Catalog Data page.

Capture Repeat Assignment Date

Select the On Enrollment Process check box if you want the Repeat Date (REPEAT_DT) populated on STDNT_ENRL when repeats are processed during the Enrollment process.

Select the On Repeat Process check box if you want the Repeat Date (REPEAT_DT) populated on STDNT_ENRL when repeats are processed during the Repeat Checking process.

Grade Match Option

Use the Repeat Rule3 page to establish grade match options.

Academic Program Options**Select Acad Prog During Enroll** (select academic program during enrollment)

Select to enable the Academic Program field on all enrollment pages that allow users to select an academic program to associate with each class. The field is available within enrollment only when a student is matriculated in more than one program. Clearing this check box hides the Academic Program field on all enrollment pages and associates the student's primary academic program with each class.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Setting Up Self-Service Options.

Setting Up Repeat Checking for Academic Careers

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

Page Used to Set Up Repeat Checking for Academic Careers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Repeat Checking	ACAD_CAR_RPT_CHK	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Repeat Checking	Set repeat checking controls at the academic career level. Also, link a repeat rule to an academic career.

Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Repeat Checking).

Repeat Checking		Self Service Options	
Academic Institution:	PSUNV	PeopleSoft University	
Academic Career:	UGRD	Undergraduate	
		Find View All First 1 of 1 Last	
Effective Date:	01/01/1900	Status:	Active
Repeat Check			
Scheme:	UGRD	Undergraduate	
Repeat Rule:	UNDERGRD	Undergraduate Grading Rule	
*Process on Enrollment:	No	☐	Temporarily Suspend Repeat Check on Enrollment
*Repeat Grade Check:	Never	☐	Temporarily Suspend Repeat Check on Grade Input
Course Catalog Repeats			
*Course Catalog Repeat Message:	Warning		

Repeat Checking page

Scheme

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

Repeat Rule

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

Process on Enrollment

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

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

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

Repeat Grade Check

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

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

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

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

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

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

Temporarily Suspend Repeat Check on Enrollment

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

Temporarily Suspend Repeat Check on Grade Input

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

Course Catalog Repeat Message

Enter the message type that the system displays during enrollment when the course catalog Allowable Repeats process detects that the student has previously taken the course. The choices are:

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

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

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

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

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

Setting Up Repeat Checking for Academic Programs

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

Page Used to Set Up Repeat Checking for Academic Programs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Repeat/Incomplete	INCOMPLETE_GRADE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete	Set repeat checking controls at the academic program level and link repeat rules to academic programs.

Setting Repeat Checking Controls for Academic Programs

Access the Repeat/Incomplete page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete).

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

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," Defining Repeating Rules and Grade Lapse Rules for Academic Programs.

Chapter 6

Setting Up the Course Catalog

This chapter provides an overview of the course catalog, lists prerequisites, and discusses how to:

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

See Also

[Chapter 7, "Setting Up Enrollment Requisites," page 131](#)

Understanding the Course Catalog

When you first set up your course catalog, make sure to do some preliminary work to research how your institution structures course prerequisites and corequisites, and how new requisites are created and approved. Our course requisite design lets you structure requirements that can be shared among many courses. Requirements can encompass prerequisite courses, grade point average (GPA) and unit requirements, and course lists, among other factors. To minimize duplicate data entry, plan your requisite requirements carefully. In addition, note that the data you enter in the course catalog is provided by default to the schedule of classes. This feature is key because it saves you data entry time when you schedule classes. The Course Catalog (CRSE_CATALOG) component uses effective dating, which enables you to track historical course changes and to prepare for curriculum changes in the future.

Prerequisites

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

- Institution codes
- Academic groups
- Subject area
- Campuses

- Academic organizations
- Academic careers
- (Optional) Room characteristics
- (Optional) Requirement designations
- (Optional) Course attributes

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Institutions

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Groups

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Subject Areas

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Setting Up Campuses

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Organizations

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Careers

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Creating Course Offerings

This section provides an overview of course offerings, lists prerequisites, and discusses how to:

- Define course catalog data.
- Define course offerings.
- Define course components.
- (NZL) Set up government reporting data.
- Link milestones to course data.
- Interface course offerings with the general ledger.

Understanding Course Offerings

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

You complete these steps to create a course:

1. Define the course title, description, units, grade bases, repeat rules, equivalent course groups, topics, and course attributes on the Catalog Data page.
2. Define the course offering number, catalog number, subject area, academic organization, Classification of Instructional Programs (CIP) and Higher Education General Information Survey (HEGIS) codes, and attach requirement designations on the Offerings page.
3. Define the course components and the final exam and room characteristics on the Components page.
4. Map courses as course item types to specific general ledger accounts on the GL Interface page.

Prerequisites

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

Pages Used to Create Course Offerings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Catalog Data	CRSE_CATALOG	Curriculum Management, Course Catalog, Course Catalog, Catalog Data	Define course titles, course units, grade bases, topics, and repeat rules.
Offerings	CRSE_CATALOG_OFFER	Curriculum Management, Course Catalog, Course Catalog, Offerings	Define course numbers, link academic organizations to course offerings, and so on.
Components	CRSE_CATALOG_CMPNT	Curriculum Management, Course Catalog, Course Catalog, Components	Define components, such as lecture, laboratory, and discussion, as well as instructor workload hours, room characteristics, additional fees, and final exams.

Page Name	Definition Name	Navigation	Usage
Crse Catalog NZL (course catalog New Zealand)	SSR_CRS_CAT_NZL	Curriculum Management, Course Catalog, Course Catalog, Crs Catalog NZL	Set up SDR and EFTS data for a course. Note. The fields on this page are available only if you select the New Zealand Catalog, SDR, EFTS, StudyLink check box on the Academic Institution 6 page. You should also select the New Zealand NSI and SDR Personal Data, SDR Degree check box on the SA Features page in the Student Administration Installation component.
Course/Milestone Link	SSR_CRS_MILESTN	Curriculum Management, Course Catalog, Course Catalog, Course/Milestone Link	Establish links between a course and unit standard milestones.
GL Interface (general ledger interface)	CRSE_OFFER_GL	Curriculum Management, Course Catalog, Course Catalog, GL Interface	Map course fees as item types to their proper general ledger accounts. The system generates charges to the student's account based on the course code you define on this page and offsets these charges based on the general ledger you define on this page. Your office should coordinate the information on this page with your controller's office.

Defining Course Catalog Data

Access the Catalog Data page (Curriculum Management, Course Catalog, Course Catalog, Catalog Data).

Catalog Data		Offerings	Components	GL Interface
Course ID:		001001		
		Find View All First 1 of 1 Last		
*Effective Date:	01/01/1900	*Status:	Active	
*Description:	College Algebra	Course Offering 1 of 1 MATH 101		
Long Course Title:	College Algebra			
Long Description:	Review of fundamental concepts of algebra. Development of matrices, determinants, Cramer's rule, logarithms, sequences and series, combinatorics, and probability.			
Course Units/Hours/Count				
Minimum Units:	3.00	Last Course of Mult Term Seq:	☐	
Maximum Units:	3.00	*Enrollment Unit Load Calc Type:	Actual Units	
Academic Progress Units:	3.00	Course Count:	1.00	
Financial Aid Progress Units:	3.00	Course Contact Hours:	3.00	
Course Grading				
*Grading Basis:	Stdnt Opt	*Grade Roster Print:	Component	
Graded Component:	Lecture			

Catalog Data page (1 of 2)

Repeat for Credit Rules			
☒ Repeat for Credit	Total Units Allowed:	3.00	
☐ Allow Multiple Enroll in Term	Total Completions Allowed:	3	

Additional Course Information			
*Instructor Edit:	Instr/Advi		
*Add Consent:	No Consent	*Drop Consent:	No Consent
Requirement Designation:			
Equivalent Course Group:			

Course Attributes			
*Course Attribute		*Course Attribute Value	
NMAJ	Open to Non-majors Only.	NON-MAJORS	Open to non-majors only.

Course Topics			
Description		Repeat For Credit	
*Course Topic ID	*Description	*Short Description	*Formal Description
1	Introduction to College Algebr	Intro Agbr	Introduction to College Algebr

Catalog Data page (2 of 2)

The system generates a unique course ID when you add a new course, as long as you do not enter a course ID yourself. You should let the system generate the course ID.

Effective Date

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

Status

Enter a status for this course. Enter *Active* when the course is valid for your institution. You can keep all courses in the database for historical research purposes by inserting a new effective-dated row and setting the status to *Inactive* for courses that you no longer offer.

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

Short Course Title and Long Course Title

The short title appears on items such as transcripts, advisement reports, study lists, and the schedule of classes. The long course title appears on the Browse Course Catalog page and the course catalog report.

Long Description

The long description can appear in the course catalog report if specified.

Course Units/Hours/Count

You can attach four unit types to a course in the course catalog:

- Minimum units
- Maximum units
- Academic progress units
- Financial aid progress units

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

Note. For courses that use the same minimum and maximum units, the Minimum Units field populates the Units Taken field on administrative enrollment pages and the Units field on self-service enrollment pages.

Minimum Units and Maximum Units

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

Academic Progress Units

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

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

Financial Aid Progress Units

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

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

Last Course of Multi-Term Sequence

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

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

The value you enter determines how the enrollment engine calculates the student's academic load. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values requires a substantial programming effort. Values are:

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

Academic Units: Enter this option for any course that does not have identical minimum units, maximum units, and academic progress units, such as remedial courses and multi-term sequence courses. Entering this option requires the system to look at the academic progress units when it calculates academic load. For example, the minimum units and maximum units might be 0 because you do not want academic level and GPA to be affected by this course. The academic progress units might be 3 so that the course would be used to calculate academic load and billing units (see the Multi-Term Course example that follows). Furthermore, you could use this option for a remedial course, as an example, if you wanted the course to be used in calculating load but not in calculating GPA.

Course Count

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

Course Contact Hours	The system populates this field by default from the Schedule of Classes - Instructor Contact Hours page, where the value is used to calculate total contact hours. Each component of the course can have different contact hours on the Components page.
Grading Basis	Enter a grading basis for the course. Grading basis values are defined on the Grading Scheme Table page. You can override the grading basis for individual class offerings when you create the schedule of classes.
Graded Component	The system displays the graded component based on the Grade Roster Print field value on this page and the Graded Component field value on the Components page.
Grade Roster Print	Enter the type of grade roster that you want to print for this course offering, as processed through the Grade Roster Print page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values requires a substantial programming effort. Values are: <i>By Student:</i> Enter to print grade rosters for each student. Each student has a distinct grade roster, separated by a page break. <i>Component:</i> Enter to print grade rosters for the graded component of the course. The graded component is specified on the Components page. <i>Instructor:</i> Enter to print grade rosters for the graded component of the course. The graded component is specified on the Components page. A copy of the grade roster prints for each instructor, primary or otherwise. The number of copies that prints is equal to the number of instructors for the course, primary or otherwise. <i>None:</i> Enter to not print a grade roster for the course.
Repeat for Credit	Select this check box to indicate that the class can be repeated for additional credit, as opposed to repeating for grade improvement only. If you do not select the check box, the class is subject to the repeat rules set up in the Repeat Rule Table component.
Allow Multiple Enroll in Term (allow multiple enrollments in term)	Select this check box to permit a student to enroll in this course multiple times within the same term. An example would be an independent study course.
Total Units Allowed	The system populates this field by default with the maximum units for the course (by default, one full course completion is always permissible). However, if you select the Repeat for Credit check box, you may edit and increase this value. This value must be equal to or greater than the maximum units for the course. The system enforces the lower of the two limits, units or completions, that you define.
Total Completions Allowed	The system populates this field with 1 by default (by default, one full course completion is always allowed). However, if you select the Repeat for Credit check box, you may edit and increase this value. This value must be equal to or greater than 1. The system enforces the lower of the two limits, units or completions, that you define.

Instructor Edit

Enter a value to indicate how you want the system to prompt for instructor IDs during class enrollment. This option determines the availability of and the prompt values for the instructor ID field on the Enrollment Request, Quick Enroll, Enrollment, and self-service enrollment pages. The system populates the value for the Instructor Edit field by default to the Class Associations page, where you can override the value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values requires a substantial programming effort. Values are:

No Choice: Enter if you want the system to make the Instructor ID field on the Enrollment Request page unavailable and to automatically assign the instructor who is scheduled to teach the class, as indicated on the Assignment tab of the Schedule of Classes - Meetings page: Thus, the student has *no choice* of instructor.

Class Instructor Edit: Enter this option if you want the system to make the Instructor ID field on the Enrollment Request, Quick Enroll, Enrollment, and Self Service Enrollment pages available and to prompt the user with only the Primary Instructors for the class, as defined on the Meetings page. Select this option for independent study courses or the like, for which the student can select one of several *Primary* instructors.

Instructor/Advisor Edit: If you enter this option, the Instructor ID field appears on the Enrollment Request, Quick Enroll, Enrollment and Self Service Enrollment pages. The system prompts the user with only the instructors available to teach this course, as defined on the Instructor/Advisor Table page.

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

The *Instructor/Advisor Edit* option should be used only for courses that belong to academic organizations for which the Instructor Advisor option is selected (on the Academic Organization Table page). This ensures that instructor selection is controlled by the academic organization settings.

See Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors, page 35.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Organizations.

Add Consent and Drop Consent

The *No Consent* value appears by default. Values for these fields are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values requires a substantial programming effort. Values are:

No Consent: Enter if no special consent is required for a student to add or drop a class.

Instructor or Department: Enter if consent is required.

Consent can be granted by using class permission numbers or student specific permissions. The consent requirement can be overridden in the enrollment process by setting an override permission option.

Requirement Designation

Enter a requirement designation for the course. A requirement designation can be additional work that is needed for a course, such as Design Credit, or a requirement designation can specify a special variety of a course to use in a course list for the Academic Advisement application.

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

Requirement designations are provided to the Academic Advisement application.

Equivalent Course Group

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

Course Attribute and Course Attribute Value

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

Override Topic Link ID

Select to manually update topic link IDs. When you select this check box, the Topic Link ID field becomes available for edit. Use this functionality to link course topics across effective-dated rows by giving them the same topic link ID.

Description Tab

See the previous exhibit for a view of this tab.

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

Course Topic ID

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

Course Topic Title, Short Description, and Formal Description

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

Topic Link ID

The system assigns a unique topic link ID number for each topic. The repeat checking process uses this number when determining if the topic was already taken. If you create a new effective-dated row for this course, the system carries over the topic link ID to the new effective-dated row. If the Override Topic Link ID check box was selected, the Topic Link ID field becomes available for edit. This selection enables you to link course topics within a course across effective-dated rows by giving them the same topic link ID. Because the repeat checking process uses the topic link ID, the process views similar topics that have the same topic link ID as being identical.

Repeat For Credit Tab

Select the Repeat For Credit tab.

Course Topics				
Description		Repeat For Credit		
*Course Topic ID	*Description	Repeat for Credit	Total Units Allowed	Total Completions Allowed
1	Introduction to College Algebr	☐	3.00	1

Course Catalog - Catalog Data page: Repeat For Credit tab

Repeat for Credit

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

Total Units Allowed and Total Completions Allowed

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

Example of Multi-Term Course

At PSUNV, when a student takes History 101a for the fall term and History 101b for the spring term, the student's credit for both courses is contingent upon the successful completion of the entire course sequence. To define this multi-term course in the course catalog, we purposefully place the minimum units, maximum units, and academic progress units out of synchronization so that the enrollment engine correctly calculates the student's academic load and GPA. The course catalog might look similar to this:

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

Because the minimum and maximum units are set to 0, History 101a will not be calculated in the student's GPA or Academic Level (if academic level increments by units, that is). But, when the student completes History 101b, he or she will receive credit for both classes because the minimum and maximum units are set to 6. Academic load and billing units will be counted for both classes because academic progress units are set to 3, and the Enrollment Unit Load Calculation type is set to *Academic Units*.

Example of Variable Unit Course

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

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

When students enroll in ENGL 1a, they have to select how many units to take. If they enroll online or through an interactive voice response system, they can select the number of units they want to take when they add the class. If they enroll in person, the Registrar's Office most likely creates an enrollment request. If the minimum and maximum unit fields on the Course Catalog Data page vary, the Units Taken field on the Enrollment Request page becomes available, and the Registrar's Office can enter the number of units the student chooses to take. The possible enrollments would look like this:

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

As shown, the student chooses the number of units to take and the system determines the units earned, academic progress units, and financial aid units based on the units you enter in the Units Taken field when the student enrolls in the class.

Defining Course Offerings

Access the Offerings page (Curriculum Management, Course Catalog, Course Catalog, Offerings).

Catalog Data	Offerings	Components	Crse Catalog NZL	Course/Milestone Link	GL Interface
Course ID: 000356					
Find View All First 1 of 1 Last					
Effective Date: 01/01/1900		Status: Active			
Description: Computing 1B Lab					
Find View All First 1 of 1 Last					
*Course Offering Nbr: 3		*Catalog Nbr: 102L ACCT			
*Academic Institution: PSAUS PeopleSoft Australia Uni		*Course Approved: Approved			
*Academic Group: ARTS Faculty of Arts		Allow Course to be Scheduled ☒			
*Subject Area: ACCT Accounting					
Campus: MAIN Main Campus					
*Academic Organization: CHEM_AUS Department of Chemistry					
*Academic Career: UGRD Undergraduate					
Tuition Group:					
Dynamic Class Date Rule:					
☐ Allow OEE Enrollment		☒ Catalog Print			
		☒ Print Instructor in Schedule			
		☒ Schedule Print			
		☒ Schedule Term Roll			
		☐ Use Blind Grading			
		☐ GL Interface Required			
		☐ Split Ownership			

Offerings page (1 of 2)

Enrollment Requirement Group

Requirement Group:

Long Description:

Taxonomy

CIP Code:

HEGIS Code:

Field of Education Code:

HECS Band ID:

Band 2

*Work Experience Indicator:

☐ Use Discipline Group From Plan

Discipline Group Code:

0902

 Accounting

Owner

Customize | Find |

First

1 of 1

 Last

*Academic Organization	*Percent Owned	Description

Offerings page (2 of 2)

- Course Offering Number

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

Within an academic group, catalog number ranges are linked to academic careers on the Academic Group Table page. If you have already specified an academic group for this course offering, the system automatically displays the appropriate academic career when you enter a catalog number. This field is 10 digits. The system reserves the four left digits exclusively for numeric characters, and the right six digits for both alpha and numeric characters. A field edit enforces this programming.

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

Catalog Number	N	N	N	N	A/N	A/N	A/N	A/N	A/N	A/N
12			1	2						
120		1	2	0						
1A				1	A					

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

N = numeric character

A/N = alpha or numeric character

Academic Institution

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

Academic Group

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

Subject Area

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

Campus

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

Academic Organization

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

Academic Career

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

Tuition Group

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

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

Dynamic Class Date Rule

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

Allow OEE Enrollment (allow open entry/exit enrollment)

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

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

The system assigns the value of this field by default based on the OEE Dynamic Date Rule field on the Academic Career Table 2 page for the academic career with which you associate this course offering. An open entry/exit (OEE) dynamic date rule is a dynamic class date rule that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an open entry/exit class. This field is available for edit only if you select the Allow OEE Enrollment check box for this course offering. Select an OEE dynamic date rule to have the system assign that rule by default to all OEE class sections of this course offering that you schedule. Attaching your rule to the course offering rather than the class section ensures consistency and eases maintenance because you only have to attach the rule to a course one time (to apply to all class sections), rather than having to attach a rule to each course offering that you schedule. The system thus automatically requires dynamic date calculation for each OEE class section that you schedule for this course offering. After you schedule the class sections, you can run the Dynamic Class Dates process to calculate landmark dates for each class section. The process automatically uses the rule that you specify here for all OEE class sections. You can override this default rule on a section-by-section basis through the Dynamic Class Data page. The system prompts you with only the dynamic class data rules that have been designated for OEE enrollment on the Dynamic Class Dates page.

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

Course Approved

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

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

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

Catalog Print

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

Print Instructor in Schedule

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

Schedule Print	Select to display the course offering in the schedule of classes. The system selects this check box by default.
Schedule Term Roll	Select to enable the prior term copy function for this course offering. See Chapter 24, "Managing the Schedule of Classes," Copying Classes from One Term to Another, page 617.
Use Blind Grading	Select to enable grade rosters for blind grading. The system populates this field by default from the Academic Subject Table page. When you generate grade rosters for a course that invokes blind grading, instead of student names on the roster, the system generates random numbers. See Chapter 43, "Grading Students," page 1043.
GL Interface Required	Select to include this class in the GL Interface process. If you select this check box, the system requires you to enter the necessary data into the GL Interface page of this component.
Split Ownership	Select if multiple academic organizations own the course. If you select this check box, the Owner group box becomes available for entry.

Enrollment Requirement Group

Requirement Group	Enter the requirement group that will link the appropriate requisites to this course. Enrollment requirement group values are defined on the Course Requisite page and can consist of a variety of elements: courses, units, GPA, and so on.
Long Description	The system enters the long description of the enrollment requirement group from the Course Requisites page.

Taxonomy

CIP Code (Classification of Instructional Programs code)	Enter the CIP code for the course. CIP codes provide a taxonomic scheme that support the accurate tracking, assessment, and reporting of fields of study and program completions activity. The system prompts you from the CIP Code Table page.
HEGIS Code (Higher Education General Information Survey code)	Enter the HEGIS code for the course. HEGIS codes provide a taxonomic scheme that support the accurate tracking, assessment, and reporting of fields of study and program completions activity. The system prompts you from the HEGIS Code Table page.

(AUS) Field of Education Code	The system enters the Australia Department of Education, Science and Training (DEST) field of education code that you entered on the Subject Taxonomy page for this course. Note. This field is available only when you select the DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.
(AUS) HECS Band ID (higher education contribution scheme band ID)	The system enters the Australia DEST HECS band ID for the field of education code. Note. This field is available only when you select the DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.
(AUS) Work Experience Indicator	Select the work experience indicator for this course. This value is used to confirm whether the course is considered wholly or partially work experience in industry for Australian DEST reporting purposes. Note. This field is available only when you select the DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.
(AUS) Use Discipline Group From Plan	Select to disable the discipline group field. The system uses the discipline group from a student's plan when a student enrolls in this course. Note. This field is available only when you select the DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.
(AUS) Discipline Group Code	The system enters the discipline group from the Subject Taxonomy page. Note. This field is available only when you select the DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.

Ownership

Use this group box to link course offerings to multiple academic organizations.

The system assumes a course offering has a single academic organization owner, unless you indicate split ownership on this page. Course ownership data is tracked for reporting and analysis purposes at the course offering level.

Important! The Ownership group box is only available if you select the Split Ownership check box.

Academic Organization	Enter the academic organization owners of the course offering. The system prompts you from the Academic Organization Table page.
Percent Owned	Enter the percentage of ownership. The total percentage must equal 100.

Examples of Equivalent and Cross-Offered Courses

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

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

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

The following examples show the defined course ID number 003302, Literature and Philosophy. It is a cross-offered course in both the English and Philosophy departments. In all ways, the two course offerings are exactly the same. They possess the same description, equivalencies, and so on. On the Offerings page, the course offering number distinguishes the two offerings.

In course offering number 1, we indicate that literature and philosophy is listed under the English Literature subject area, catalog number 270.

Catalog Data		Offerings	Components	GL Interface
Course ID:		003302		
Effective Date:		01/01/1900		
Description:		Lit and Phils		
Status:		Active		
Find View All First 1 of 1 Last				
Course Offering				
*Course Offering Nbr:		1		
*Catalog Nbr:		270 ENGLIT		
*Academic Institution:		PSUNV PeopleSoft University		
*Academic Group:		LBART College of Liberal Arts		
*Subject Area:		ENGLIT English Literature		
Campus:				
*Academic Organization:		ENGLISH English		
*Academic Career:		UGRD Undergraduate		
Tuition Group:				
Dynamic Class Date Rule:				
☐ Allow OEE Enrollment				
*Course Approved:		Approved		
Allow Course to be Scheduled		☒		
☒ Catalog Print				
☒ Print Instructor in Schedule				
☒ Schedule Print				
☒ Schedule Term Roll				
☐ Use Blind Grading				
☐ GL Interface Required				
☐ Split Ownership				
Enrollment Requirement Group				
Requirement Group:				
Long Description:				
		Detail		

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

Add another row for course offering number 22. The second offering of literature and philosophy is listed under the Philosophy subject area, catalog number 170.

Catalog Data		Offerings	Components	GL Interface
Course ID:	003302			
Effective Date:		01/01/1900		Status: Active
Description:		Lit and Phils		
Course Offering		Find View All First 1 of 1 Last		
*Course Offering Nbr:	2	*Catalog Nbr:	170	PHILO
*Academic Institution:	PSUNV	PeopleSoft University		
*Academic Group:	LBART	College of Liberal Arts		
*Subject Area:	PHILO	Philosophy		
Campus:				
*Academic Organization:	PHILOSOPHY	Philosophy		
*Academic Career:	UGRD	Undergraduate		
Tuition Group:				
Dynamic Class Date Rule:	RULE10	Rule 10 for Dynamic Date Cntl		
☒ Allow OEE Enrollment				
OEE Dynamic Date Rule:	OEE15WK-1	OEE 15 Week Schedule		
*Course Approved: Pending				
Allow Course to be Scheduled ☒				
☒ Catalog Print ☒ Print Instructor in Schedule ☒ Schedule Print ☒ Schedule Term Roll ☐ Use Blind Grading ☐ GL Interface Required ☐ Split Ownership				
Enrollment Requirement Group				
Requirement Group:		Detail		
Long Description:				

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

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

Defining Course Components

Access the Components page (Curriculum Management, Course Catalog, Course Catalog, Components).

Catalog Data		Offerings		Components		GL Interface	
Course ID:		001001					
Effective Date:		01/01/1900		Status:		Active	
						MATH 101	
Course Component		Find View All First 1 of 1 Last					
*Course Component:		Lecture		☐ Auto Create		+ -	
Instructor Contact Hours:				☒ Graded Component			
Default Section Size:				☒ Primary Component			
Workload Hours:				☐ Optional Component			
OEE Workload Hours:				☐ Generate Class Mtg Attendance			
*Final Exam:		Yes					
Exam Seat Spacing:		1				Add Fee	
Provider for Authentication							
LMS Extract File Type:							

Course Catalog - Components page (1 of 2)

Course Attendance		Find View All First 1 of 1 Last	
Instruction Mode:	P In Person	+ -	
*Attendance Type:	Class Meeting		
☒ Use Present	☒ Use Contact Minutes		
☒ Use Reason	☒ Use To and From Time		
☒ Use Tardy	☐ Override Template Date / Time		
☒ Use Left Early			
Room Characteristics Required		Customize Find First 1 of 1 Last	
*Room Characteristic	Description	*Room Characteristic	Quantity
03	Podium		1
			+ -

Course Catalog - Components page (2 of 2)

Course Component

Course Component

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

Instructor Contact Hours	Enter the contact hours you want to record for the instructors teaching this component of the course. You can also assign specific instructors and corresponding contact hours when scheduling classes on the Schedule of Classes - Meetings page. Use this field only if you want to report contact hours manually. The Instructor Workload feature does <i>not</i> reference this free-form field.
Default Section Size	Enter the default section size. You can override section sizes in the schedule of classes. The system uses the value in this field to populate the Requested Room Capacity field and the Enrollment Capacity field.
Workload Hours	If you want to track instructor workload based on course component workload hours, enter a workload hours value for the course component. The system uses the value that you specify here to populate the same fields on the Class Associations - Class Components page when you schedule a new course. Therefore, if you set the lecture workload hours to 3 on the Course Catalog - Components page, then whenever someone schedules a lecture for this course, the lecture component, 3 workload hours, appears by default on the Class Components page. Similarly, if you set the laboratory component to 1 workload hour on the Components page, then whenever someone schedules a laboratory for this course, the laboratory component, 1 workload hour, appears by default on the Class Components page. The user can modify the component values on the Class Components page if necessary. This field is optional.
OEE Workload Hours (open entry/open exit workload hours)	If you want to track instructor workload based on course component OEE workload hours, enter an OEE workload hours value for the course component. The value you specify here represents the number of workload hours for the entire course, unlike regular workload hours, which represent weekly hours for the course. The system populates the value in this field by default to the same components on the Class Associations - Class Components page when you schedule a new course. In other words, if you set the lecture OEE workload hours to 45 on the Components page, then whenever someone schedules a lecture for this course, the lecture component, 45 OEE workload hours, appears by default on the Class Components page. Similarly, if you set the laboratory component to 15 OEE workload hours on the Components page, then whenever someone schedules a laboratory for this course, the laboratory component, 15 OEE workload hours, appears by default on the Class Components page. You can modify the component values on the Class Components page if necessary. This field is optional.

Final Exam

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

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

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

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

Exam Seat Spacing

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

Provider for Authentication

If this course is a learning management system (LMS) course requiring self-service user authentication, and the Provider for Authentication is not set on the Academic Institution 3 page, then enter the provider here. The value entered here appears by default on the schedule of classes when you schedule a class, but you can override it. If this field is left blank, any time you schedule a class for this course the system uses the LMS file type from the Academic Institution 3 page.

LMS File Type

If your institution uses the LMS interoperability feature, enter the LMS file type for the interface. The value entered here appears by default in the schedule of classes when you schedule a class, but you can override it. If this field is blank, any time you schedule a class for this course, the LMS file type is provided by default from the setting on the Academic Institution 3 page.

Values are *XML V1.01*, *Blackboard CourseInfo 4*, and *API Input*. *WebCT Campus Edition* and *WebCT Vista* both support XML V1.1 and user authentication.

Auto Create

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

See [Chapter 24, "Managing the Schedule of Classes," Scheduling New Classes, page 540](#).

Graded Component

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

Primary Component	Select whether this is the primary component of the course. If you are using the Dynamic Class Dates feature, it is mandatory that you select a primary component for the course, even if you only have one component. The Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses the primary component value on the Class Associations - Class Components page.
Optional Component	If available for entry, select so that the system does not require that students enroll in this component. If you clear the check box, the system requires students to enroll in the component.
Include in Dynamic Date Calc (include in dynamic date calculation)	Select to include this component of the course offering, in addition to the primary component, in the Dynamic Class Dates process. The system automatically selects and makes unavailable for edit this check box for the primary component of a course because the Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. This check box is optional for other components. The value here appears by default on the corresponding field for all class sections of the component that you schedule on the Basic Data page. For non-primary components, you can override the default value on a section-by-section basis.
Generate Class Mtg Attendance (generate class meeting attendance)	Select to indicate that you want the system to always generate attendance rosters for all classes your institution schedules for this course component. This value defaults to the Schedule of Classes where you can override this setting. Selecting this check box marks the class so that when you generate attendance rosters through the Attendance Roster Generator page you have the option to limit processing to only the classes that have this check box selected and that meet your processing criteria. If you clear this check box on the Attendance Roster Generator page, the generator creates attendance rosters for all classes that meet your processing criteria, regardless of the check box setting. When you generate attendance rosters through the Class Attendance page and this check box is selected for a scheduled class, the setting has no effect on processing.
Add Fee	Click to add an additional fee for the course component and to access the Course Fees Modal page. The additional fee is attached to the course component that you specify. See <i>PeopleSoft Student Financials 9.0 PeopleBook</i> , "Setting Up Fees and Tuition Groups," Setting Up Course Fees and Class Fees.

Course Attendance

Instruction Mode

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

Attendance Type

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

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

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

Use Present

Select in order for the attendance rosters to have a Present check box on them.

Use Reason	Select in order for the attendance rosters to have a Reason field on them. You can use the reason field to describe a reason for why a student is present, tardy, leaves early, or any other reason your institution wants to track.
Use Tardy	Select in order for the attendance rosters to have a Tardy check box on them.
Use Left Early	Select in order for the Attendance rosters to have a Left Early check box on them.
Use Contact Minutes	Select in order for the attendance rosters to have a Contact Minutes field on them. The system populates the contact minutes time with the total minutes of the class meeting. The system determines this value based on the Class Meeting pattern that your institution has set up for the class in the Schedule of Classes.
Use To and From Time	Select in order for the attendance rosters to have a to and from time field to designate the start and end time of a class meeting. The system determines this value based on the class meeting pattern that your institution has set up for the class in the Schedule of Classes.
Override Template Date/Time	Select for the attendance rosters to have an attendance date field on them. Also, you can override the attendance date, from time, and to time values that appear on the attendance rosters. Otherwise, the corresponding fields that appear on an attendance roster template control the attendance date, from time and to time values that appear for each student on the attendance rosters. A template only identifies an attendance roster as unique.

Room Characteristics Required

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

(NZL) Setting Up Government Reporting Data

Access the Crse Catalog NZL (course catalog New Zealand) page (Curriculum Management, Course Catalog, Course Catalog, Crs Catalog NZL).

Crse Catalog NZL

Course/Milestone Link

GL Interface

Course ID:

000381

Find | View All

First 1 of 1 Last

Effective Date:

01/01/1900

Status:

Active

Description:

Intro to Management Accounting

Find | View All

1 of 1

ACCT

101

Silver Fern University

Course Catalog NZL

*Main Program:

BCOM

Bachelor of Commerce

☐ Embedded Literacy/Numeracy

*NZSCED Detail Code:

080101

Accounting

*Course Type:

Type A - Program EFTS

EFTS Factor:

0.0000

NQF Level:

Level 1

NQF Credit:

5

*Course Classification:

03

Arts; Humanities; Social Sciences

*Funding Category:

A2

Arts & Soc Sci - Degree

Pre-Service Stage:

First stage of programme

eLearn Status:

Average Course Fee:

Foreign Fee:

*Eligible for PBRF:

Not PBRF Eligible

Compulsory Course Costs:

*Exempt Indicator:

Not Exempt

VRF:

Crse Catalog NZL page

- Main Program

Enter the main program for this course.
When you generate the SDR course register file, the prospectus code from the program you select here is reported as a qualification code.
- NZSCED Detail Code

Enter the NZSCED field of study code for this course.
Set up NZSCED field of study codes on the NZSCED Field of Study NZL page.

Course Type	Enter the course type for this course. Values are: • Type A - Program EFTS • Type B - Hourly EFTS If you enter Type B, the system displays the Hours field, in which you can enter the total hours for the course. The system calculates the EFTS factor based on the new value. If you enter Type A, the system recalculates the EFTS factor whenever the values change for the UNITS_ACAD_PROG, UNITS_MINIMUM, and UNIT_MAXIMUM fields in the CRSE_CATALOG record. The system calculates the EFTS factor for type A courses by multiplying the academic progress units for the course by the EFTS Translation A value defined for the institution.
EFTS Factor	The system automatically calculates the EFTS factor for the course whenever you add a new course or whenever you change the course type or hours for the course. The system calculates the EFTS factor by multiplying the course hours by the EFTS Transaction B value defined for the institution.
NQF Level	Enter the New Zealand Register of Quality Assured Qualifications level for the credits in this course.
NQF Credit	Specify the number of New Zealand Register of Quality Assured Qualifications credits contained in this course.
Course Classification	Enter the course classification code for this course. Define course classifications on the Course Classification NZL (SSR_CRS_CLSF_FNDC) page. Only Course Classifications that have an effective date less than or equal to the current date and a status of <i>Active</i> are available for selection in the Course Classification field.
Funding Category	Enter the funding category for this course. Define funding categories on the Funding Category NZL (SSR_FUND_CAT_NZL) page.
Pre-Service Stage	For courses that are part of a teacher training program, enter the pre-service stage code for the course.
eLearn Status	Enter the eLearn status to indicate whether or not this course is offered through the internet.
Average Course Fee	Enter the average fee for the students enrolled in this course for the reporting period.
Foreign Fee	Enter the tuition fee paid by foreign, fee paying students.

Eligible for PBRF (eligible for Performance Based Research Fund)	Use this field to indicate if a course is eligible for the Performance Based Research Fund.
Compulsory Course Costs	Enter a dollar amount for the total compulsory fees for this course.
Exempt Indicator	Indicate if a course was granted an exemption from FCCM (Fees/Course Costs Maxima).
VRF (Volume of Research Factor)	Use this field to capture Volume of Research Factor data. This field is for informational purposes only.
Embedded Literacy/Numeracy	Select this check box to indicate that the course has an embedded literacy or numeracy component. The check box is cleared by default.

See Also

Chapter 18, "(NZL) Setting Up Government Reporting," page 455

Linking Milestones to Course Data

Access the Course/Milestone Link page (Curriculum Management, Course Catalog, Course Catalog, Course/Milestone Link).

Catalog DataOfferingsComponentsCrse Catalog NZLCourse/Milestone LinkGL Interface

Course ID:000390

Find | View All

First1 of 1Last

Effective Date:01/01/1900

Status:Active

Milestone	Description		
NQF7359	Acctg and Business Entities	+	-
NQF7365	Small Businesses	+	-
NQF8419	Monetary Policy	+	-

Course/Milestone Link page

Milestone	Enter the unit standards to link to this course.
	Note. Link unit standards to milestones on the NQF Detail page in the Milestone component.

See Also

Chapter 18, "(NZL) Setting Up Government Reporting," Preparing for NZQA Reporting, page 462

Interfacing Course Offerings with the General Ledger

Access the GL Interface page (Curriculum Management, Course Catalog, Course Catalog, GL Interface).

Copy and paste icons appear on this page, next to the Jrnl Set field. Use the copy icon to copy the setup for the row, which can then be pasted to the new, or any proceeding, row.

Receivables From Item Type Select if you do not want to track revenue by course. The system allocates revenue based on the credit entry defined for the tuition item type. In this case, do not enter ChartField information.

The system automatically tracks receivables for a course based on the debit entry defined for the tuition item type (on the Item Types - GL Interface page). If you want to track revenue by course, you must select the GL Interface Required check box on the Catalog Data page and then enter a credit entry for the class by completing the ChartFields on this page.

See Also

PeopleSoft Student Financials 9.0 PeopleBook, "Using GL Interface Processing"

PeopleSoft Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup," Mapping Item Types to General Ledger Accounts

Creating Course Equivalency Groups

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

Complete these steps to create a course equivalency group:

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

See Also

Chapter 6, "Setting Up the Course Catalog," Defining Course Catalog Data, page 90

Page Used to Create Course Equivalency Groups

Page Name	Definition Name	Navigation	Usage
Course Equivalencies	CRSE_EQUIV	Curriculum Management, Course Catalog, Course Equivalencies, Course Equivalencies	Define the course equivalency group.

Creating a Course Equivalency

Access the Course Equivalencies page (Curriculum Management, Course Catalog, Course Equivalencies, Course Equivalencies).

Course Equivalencies

[Find](#) | [View All](#)
First 1 of 1 Last

Equivalent Course Group: 05001

***Effective Date:** 01/01/1980 31
***Status:** Active

***Description:** Elementary Statistics

Short Description: Statistics

[Fetch Course Equivalencies](#)

Equivalent Courses

[Find](#)
First 1-2 of 2 Last

Course ID: 001011	Effective Date: 01/07/1980 Status: Active Equivalent Course Group: 05001 Elementary Statistics	Course Offering Find 1 of 1 <table> <tr> <td>STATS</td> <td>115</td> </tr> </table>	STATS	115
STATS	115			
Course ID: 001012	Effective Date: 01/07/1980 Status: Active Equivalent Course Group: 05001 Elementary Statistics	Course Offering Find 1 of 1 <table> <tr> <td>ECON</td> <td>115</td> </tr> </table>	ECON	115
ECON	115			

Course Equivalencies page

Effective Date

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

Status

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

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

Description and Short Description

Enter the descriptions of the equivalent course group.

Fetch Course Equivalencies

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

Course Equivalencies

[Find](#) | [View All](#)
First 1 of 1 Last

Equivalent Course Group: 05001

***Effective Date:** 01/01/1980

***Status:** Active

***Description:** Elementary Statistics

Short Description: Statistics

Fetch Course Equivalencies

Equivalent Courses		Find	First	1-3 of 3	Last
Course ID: 001011 Effective Date: 09/16/2004 Equivalent Course Group: 05002	Applied Statistics Calculus 1	Find	1 of 1	Course Offering STATS 115	Equivalent Course Group
Course ID: 001011 Effective Date: 01/07/1980 Equivalent Course Group: 05001	Applied Statistics Elementary Statistics	Find	1 of 1	Course Offering STATS 115	
Course ID: 001012 Effective Date: 01/07/1980 Equivalent Course Group: 05001	Economic Statistics Elementary Statistics	Find	1 of 1	Course Offering ECON 115	

Assigning Courses to a New Equivalent Course Group (CRSE_EQUIV)

The system displays an effective date and equivalent course group for every course. To determine when data for an effective-dated row is superseded, look at the next row. In the example, the system shows that course ID 001011 was part of Equivalent Course Group 05001 until 09/16/2004. As of 09/16/2004, course ID 001011 became associated with Equivalent Course Group 05102.

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

Viewing Course Catalog Summary Information

This section discusses how to review course catalog summaries.

Page Used to View Course Catalog Summary Information

Page Name	Definition Name	Navigation	Usage
Course Catalog Summary	CRSE_CATALOG_SUM	Curriculum Management, Course Catalog, Catalog Summary, Course Catalog Summary	View a summary of course offerings.

Reviewing Course Catalog Summaries

Access the Course Catalog Summary page (Curriculum Management, Course Catalog, Catalog Summary, Course Catalog Summary).

Course Catalog Summary

Course ID: 001011 **Applied Statistics**

[Find](#) | [View All](#) First 1 of 1 Last

Effective Date: 01/07/1980 **Status:** Active
Equivalent Course Group: 05001 Elementary Statistics
Grading Basis **Min Units** **Max Units** **Prgrss Unt** **Crs Cntct** **Allowd Unt** **Allow Comp**
 Stdnt Opt 3.00 3.00 3.00 3.00 3.00 1

Equivalent Course Group

  Course ID	Effective Date
001012 Economic Statistics	01/07/1980

Course Offering

Institution	Acad Group	Subject	Catalog	Acad Org	Approved	Career	Campus
PSUNV	LBART	STATS	115	MATH	Approved	Undergrad	

Course Component

Component	Instructor Contact Hours
Lecture Optional ☐	

Course Catalog Summary page



If the course is a part of an equivalent course group, the equivalent course group appears. Click the Open button to toggle between the equivalent courses.



Click the Detail button to go the Course Catalog - Catalog Data page for the course. You can use this button to view further details or to modify data for the course.

See Also

[Chapter 6, "Setting Up the Course Catalog," Creating Course Equivalency Groups, page 118](#)

[Chapter 6, "Setting Up the Course Catalog," Creating Course Offerings, page 88](#)

Printing the Course Catalog

This section discusses how to enter course catalog report parameters.

Page Used to Print the Course Catalog Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print Course Catalog	RUNCTL_SRYCATLG	Curriculum Management, Course Catalog, Print Course Catalog, Print Course Catalog	Use the Print Course Catalog page to print the course catalog (SR301 Report).

Entering Course Catalog Report Parameters

Access the Print Course Catalog page (Curriculum Management, Course Catalog, Print Course Catalog, Print Course Catalog).

Print Course Catalog

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Selection Criteria

From Date:	01/01/2006		
End Date:	06/30/2007		
Academic Institution:	PSUNV		PeopleSoft University
Academic Organization:	PSYCHOLOG\		Psychology
Academic Group:			
Academic Career:			

Report Options

Course Approved:	Approved	☒ Print Course Topics
Catalog Print:	Yes	☒ Print Require Group
☐ Report Only		☒ Print Course Attributes
File Path:		☒ Print Course Equivalent
C:\TEMP\		☒ Print Requirement Designation
		☒ Print Component Characteristic
		☐ Print OEE Designator

Print Course Catalog page

From Date and End Date	Enter a from date and an end date. These dates are the effective dates of the course offerings. They are required fields. The system prints all active courses that are greater than or equal to the from date, and less than or equal to the end date.
Academic Institution	The system populates this field with the value on the User Defaults 1 page.
Academic Organization	Enter the academic organization. You are prompted by the Academic Organization Table page.
Academic Group and Academic Career	Enter the academic group and academic career if you want to limit the scope of the report. Academic group values are defined on the Academic Group Table page. Academic Career values are defined on the Academic Career Table page.
Course Approved	Select whether you want to display <i>Approved</i> , <i>Denied</i> , or <i>Pending</i> courses. To report courses of all three types, run three reports, each with a different Course Approved field value.

Catalog Print

Select whether you want to view text designated as catalog print text. If you select *Yes*, all courses with the Catalog Print check box selected on the Course Catalog Offerings page appear in the report. If you select *No*, the courses that do not have the Catalog Print check box selected appear in the report. If you select *All*, all courses appear, regardless of the setting of the check box.

Report Only

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

File Path

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

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

Run

Click to run the report using PeopleSoft Process Scheduler. You should set the type to *Web* and the format to *PDF*.

Searching for Courses

This section discusses how to:

- Browse the course catalog.
- Select a course offering.
- View course catalog details.

Pages Used to Search for Courses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Course Catalog	SSS_BROWSE_CATLG	Curriculum Management, Course Catalog, Browse Catalog, Browse Course Catalog	Browse the course catalog to see a list of courses offered at the institution.

Page Name	Definition Name	Navigation	Usage
Browse Course Catalog - Select Course Offering	SSS_BCC_SEL_CRSE	On the Browse Course Catalog page, click a course title that includes this message: *** view multiple offerings.	Select the appropriate offering when a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title.
Browse Course Catalog - Course Detail	SSS_CRSE_OFFER_DTL	Click a course number or course title on the Browse Course Catalog page.	View course details and access class sections.

Browsing the Course Catalog

Access the Browse Course Catalog page (Curriculum Management, Course Catalog, Browse Catalog, Browse Course Catalog).

Browse Course Catalog

Select Institution

PeopleSoft University

▼

change

A

B

C

D

E

F

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J

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8

9

COLLAPSE ALL

EXPAND ALL

Select subject code to display or hide course information.

▶

ACCT - Accounting

▶

ANATOMY - Anatomy

▶

ANTHRO - Anthropology

▼

ART - Art

Course Nbr	Course Title	Typically Offered
100	Basic Studio in Art	Fall, Spring
101	Art Survey	Fall
111	Introductory Art Seminar	Fall, Spring
112	History of World Art	Spring
113	History of World Art	Fall
121	Introductory Painting	Fall, Spring, Summer
130	Survey of Printmaking *** view multiple offerings	Winter

Browse Course Catalog page

Select Institution

Enter the institution for which you want to search for courses.

Course Nbr (course number) and **Course Title**

Click a course number or a course title to view course details and section information.

You are taken to the Select Course Offering page when a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title—see ART 130 in the previous example page. Notice that the course title includes this message: *** view multiple offerings.

Typically Offered

The terms in which a course is typically offered, as defined on the Offerings page.

Selecting a Course Offering

Access the Browse Course Catalog - Select Course Offering page (on the Browse Course Catalog page, click a course title that includes this message: *** view multiple offerings.)

Browse Course Catalog				
Select Course Offering				
Return to Browse Course Catalog				
ART 130 - Survey of Printmaking				
Career	Campus	Typically Offered	Academic Group	Academic Organization
Undergraduate	Main Hacienda Campus	Winter	College of Fine Arts	Art
Undergraduate	Main Hacienda Campus	Winter	College of Fine Arts	College of Fine Arts
Return to Browse Course Catalog				

Browse Course Catalog - Select Course Offering page

Use this page to select the appropriate offering when a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title.

Viewing Course Catalog Details

Access the Browse Course Catalog - Course Detail page (click a course number or course title on the Browse Course Catalog page or a course offering link on the Browse Course Catalog - Select Course Offering page).

Browse Course Catalog

Course Detail

[Return to Browse Course Catalog](#)

PSYCH 495 - Psychology Special Topics

Course Detail

Career	Undergraduate	
Units	2.00 - 3.00	
Grading Basis	Graded	
Course Components	Lecture	Required
	Laboratory	Required

[view class sections](#)

Enrollment Information

Typically Offered	Fall
Add Consent	Instructor Consent Required
Drop Consent	Department Consent Required
Enrollment Requirement	Must be an Honors student
Requirement Designation	Honors Option
Course Attribute	Open to seniors only. Open to majors only.

Description

An intensive study of a psychological topic which commands the current focus of interest of both the faculty member and the students.

Browse Course Catalog - Course Detail page

Course Schedule

Click the view class sections button to view the course schedule details.

Course Schedule

Terms Offered

2006 Fall

▼

show sections

● Open

■ Closed

▲ Wait List

PSYCH 495 sections for 2006 Fall

Section	Session		Topic	Status	
01-LEC (1539)	Combined	1	Research Methods in Psych	●	
Days	Start	End	Room	Instructor	Dates
MWF	1:00PM	1:50PM	Bush 1100	Aurelia Edmundson, Edward Litman	08/30/2006 - 12/12/2006
F	2:00PM	4:30PM	King 100	Mara Baylor	08/30/2006 - 12/12/2006

Section	Session	Topic	Status		
01A-LAB (1540)	1	Research Methods in Psych	●		
Days	Start	End	Room	Instructor	Dates
F	8:00AM	10:30AM	Angel 102	Aurelia Edmundson	08/30/2006 - 12/12/2006

Section	Session	Topic	Status		
02-LEC (1541)	1	Historical Perspective of Psy	●		
Days	Start	End	Room	Instructor	Dates
M	9:00AM	11:30AM	TBA	Staff	08/30/2006 - 12/12/2006

Course Schedule page

Enter a term and click the show sections button to view class sections for the course.

Chapter 7

Setting Up Enrollment Requisites

This chapter provides an overview of enrollment requisite setup and maintenance and discusses how to:

- Define requisite program statuses.
- Define tests for use in requisites.
- Define student groups for use in requisites.
- (Optional) Define requisite conditions.
- (Optional) Define entity groups for use in requisites.
- Define enrollment requirement groups.
- Define enrollment requirements.
- Define enrollment course lists.
- View enrollment requisite summary information.
- Generate a reverse engineering report.
- Generate the Enrollment Requirement Group report.
- Generate the Requirement report.
- Generate the Entity Group Table and Condition Table reports.

Understanding Enrollment Requisite Setup and Maintenance

In Student Records, two levels are available at which you can create enrollment requisites and requirements:

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

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

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirement Groups"

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements"

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Course Lists"

Prerequisites

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

- Academic institutions.
- Requisite program statuses.
- (Optional) Tests for requisites.
- Student Groups for requisites.
- (Optional) Requisite conditions.
- (Optional) Enrollment requirements.
- (Optional) Enrollment course lists.
- (Optional) Entity groups.
- (Optional) Requirement designations.
- (Optional) Courses.

Defining Requisite Program Statuses

This section discusses how to define valid academic program statuses for use in requisite checking.

Page Used to Define Requisite Program Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Requisite Prog Status	SSR_ENR_RPT_TYPE	Curriculum Management, Enrollment Requirements, Define Requisite Prog Status, Define Requisite Prog Status	Enter valid academic program statuses for use in Enrollment Requisites conditions.

Defining Requisite Program Statuses

Access the Define Requisite Prog Status page (Curriculum Management, Enrollment Requirements, Define Requisite Prog Status, Define Requisite Prog Status).

Define Requisite Prog Status page

Use this page to identify valid program statuses for an institution. The statuses that are defined on this component are considered valid for enrollment requisites using conditions that specify academic programs, plans, or sub-plans. The requisite checking process evaluates only programs, plans, or subplans for which the student's current (for the enrollment term) academic program status matches one of the statuses defined here.

Effective Date Enter the date for which the program status is effective for requisites.

Program Status Enter the valid program statuses for the assigned effective date.

Note. In most cases, you will need to define only one status here (ACTV). Adding any other non-active program statuses allows requisite conditions based on academic program, plan and sub plans to be satisfied by non-active students.

Defining Tests for Use in Requisites

This section discusses how to define tests for use in enrollment requisites.

Page Used to Define Tests for Use in Requisites

Page Name	Definition Name	Navigation	Usage
Define Tests for Requisites	SSR_REQ_COND_TEST	Curriculum Management, Enrollment Requirements, Define Tests for Requisites, Define Tests for Requisites	Set up test information for use in conditions in enrollment requirement groups and requirements.

Defining Tests for Requisites

Access the Define Tests for Requisites page (Curriculum Management, Enrollment Requirements, Define Tests for Requisites, Define Tests for Requisites).

Define Tests for Requisites

Find | View All First 1 of 1 Last

Academic Institution: PSUNV PeopleSoft University

Test ID: ACT ACT Assessment

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

Processing Controls

Months Valid: 30 ☒ **Enable User to Override Months**

Test Score Method: Highest Score ☒ **Enable User to Override Method**

Valid Data Sources

'Data Source: American College Testing

'Data Source: School

Define Tests for Requisites page

Use this page to identify the tests and related data that you want to use in conditions in enrollment requirement groups and requirements. The Test IDs are already defined in the Test Tables component. Here, you are identifying which Test IDs and related data that you want to use in enrollment requisites.

Important! If you want to use test scores in academic requirements, you must define your Test IDs and related data in the Define Tests for Advisement component.

See *PeopleSoft Academic Advisement 9.0 PeopleBook*, "Setting Up Optional Advisement Data."

Note. Tests defined in this component are saved with a requirement usage code of *ENR*. Users can retrieve such rows using this component only.

Test ID

Select the Test ID (such as ACT, GMAT, or GRE) that you want to use in enrollment requirement groups or enrollment requirements. The system displays values defined on the Test Tables page. This field is unavailable for entry unless you are in Add mode.

Status	Select the status of the report identifier. Values are: <i>Active:</i> Select when adding a new report identifier. <i>Inactive:</i> Select only if your institution no longer uses this report identifier. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values will require a substantial programming effort.
Months Valid	Enter the number of months for which a test score can be considered valid. An empty (blank) field is interpreted to mean that the test is always valid.
Test Score Method	Select the test score method. Values are: <i>Average of All Scores Taken:</i> Select to have the enrollment engine average scores for a given test when it processes the test for a condition in an enrollment requirement or requirement group. <i>First Test Taken:</i> Select to have the enrollment engine use the test score with the earliest date when it processes the test for a condition in an enrollment requirement or requirement group. <i>Highest Score:</i> Select to have the enrollment engine use the highest score for a given test when it processes the test for a condition in an enrollment requirement or requirement group. <i>Last Test Taken:</i> Select to have the enrollment engine use the score from the last test date taken when it processes the test for a condition in an enrollment requirement or requirement group. <i>Lowest Score:</i> Select to have the enrollment engine use the lowest score for a given test when it processes the test for a condition in an enrollment requirement or requirement group.
Enable User to Override Method	By default, this check box is cleared, which means that the user is unable to change this value for this test ID in the Enrollment Requirement, Enrollment Requirement Group, or Define Requisite Conditions component pages. Select this check box if you want to enable a user to change the Test Score Method field value on the enrollment requirement or enrollment requirement group components. This check box label is defined in the Message Catalog. You can change this label as needed.
Enable User to Override Months	By default, this check box is cleared, which means that the user is unable to change the Months Valid field value in the academic requirement or academic requirement group component pages. Select this check box if you want to enable a user to change the Test Score Method field value on the Enrollment Requirement, Enrollment Requirement Group, or Define Requisite Conditions components. This check box label is defined in the Message Catalog. You can change this label as needed.

Data Source

Select one or more valid data sources (American College Testing, for example) for the test ID you are defining. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered testing agency values that appear here are *American College Testing*, *College Board*, *Educational Testing Services*, and *Law School Admission Services*. These are the data sources that will be considered as valid when processing a test score in an enrollment requirement or requirement group.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Setting Up External Test Score Loads"

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Optional Advisement Data"

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements"

Defining Student Groups for Use in Requisites

This section discusses how to define student groups for use in enrollment requisites.

Page Used to Define Requisite Student Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Requisite Student Group	SSR_VALID_STDNT_GR	Curriculum Management, Enrollment Requirements, Define Requisite Student Group, Define Requisite Student Group	Enter student groups for use in enrollment requisites.

Defining Requisite Student Groups

Access the Define Requisite Student Group page (Curriculum Management, Enrollment Requirements, Define Requisite Student Group, Define Requisite Student Group).

Define Requisite Student Group

[Find](#) | [View All](#)
First 1 of 1 Last

Academic Institution: PSUNV PeopleSoft University

Effective Date: 01/01/2004

Find			First	1-7 of 7	Last
*Student Group:	ATHL	Athlete			
*Student Group:	CSU	CSU Breadth			
*Student Group:	ESL	English as a Second Language			
*Student Group:	HONR	Honors Society			
*Student Group:	IGTC	IGETC			
*Student Group:	ITNL	International Student			

Define Requisite Student Group page

Use this page to identify the student group codes that you want to use in conditions in enrollment requirement groups and requirements.

Note. Student groups that are defined in this component are saved with a requirement usage code of ENR.

Effective Date Enter the date for which the student group is effective.

Student Group Enter the valid student group or groups for the assigned effective date.

Defining Requisite Conditions (Optional)

This section provides an overview of conditions for use in enrollment requisites and discusses how to define them.

Understanding Requisite Conditions

When you want to create an enrollment requisite that contains a condition, you select a value from the list of delivered "standard" condition codes (Cumulative Grade Point Average, for example). For example, you might set up a course prerequisite whose condition is that the student's cumulative GPA is greater than 3.0.

Requisite conditions enable you to create conditions that are more complex and then use those as conditions in an enrollment requirement or requirement group. They enable you to use multiple standard conditions (student group equals athlete and academic standing is good, for example), user programmable conditions (a milestone, for example), or a combination thereof. For example, you might set up a requisite condition whereby academic level must be less than sophomore and that the SAT math score must be greater than or equal to 650.

A condition specification (requisite condition) is a condition that includes connector types, lines, process types, parameters, and controls. It can also be referenced by another requisite condition. Using Boolean logic, requisite conditions can be combined within a condition specification to create more complex requisite conditions. For example, you could create two requisite conditions, and then point to these from a third requisite condition. Requisite condition #1 equals academic level = freshman and cum GPA >= 2.0. Requisite condition #2 equals sophomore and cum GPA >= 2.5. Requisite condition #3 equals requisite condition #1 OR requisite condition #2.

Page Used to Define Requisite Conditions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Requisite Conditions	RQ_CONDITION	Curriculum Management, Enrollment Requirements, Define Requisite Conditions, Define Requisite Conditions	Define the conditions for use in enrollment requirements or enrollment requirement groups.

Defining Requisite Conditions

Access the Define Requisite Conditions page (Curriculum Management, Enrollment Requirements, Define Requisite Conditions, Define Requisite Conditions).

Define Requisite Conditions

Condition Details Find | View All 1 of 1

Condition Specification:	000005		
*Effective Date:	01/01/1900	*Status:	Active
*Description:	Writing Portfolio	Short Description:	Portfolio
Long Description:	Verify that student has completed an Undergraduate Writing portfolio.		
*Academic Institution:	PSUNV	PeopleSoft University	☐ Calculate Test Score
Connector Type:	AND		

Condition Lines Find | View All 1 of 1

*Condition Line Sequence:	1
*Condition Process Type:	User Programmable Condition
Condition Process Identifier:	0001 Milestone Check

Condition Line Details Find | View All First 1 of 1 Last

Condition Line Detail Sequence:	1
Academic Institution:	PSUNV PeopleSoft University
Academic Career:	
Academic Program:	
Academic Plan:	
Milestone:	WRITING Writing Portfolio
Milestone Complete:	Completed
Milestone Level:	UNDERGRADUATE Undergraduate Portfolio
Minimum Grade Points:	
Milestone Title:	Writing Portfolio

Define Requisite Conditions page (in Add mode)

Condition Specification

This is an arbitrary number that is unique for each condition specification. You can use this condition specification as a condition in an enrollment requirement or enrollment requirement group.

Description

Enter a description for the condition specification that you want to establish. The description appears on the enrollment requisite (requirement group) summary, enrollment requirement summary, the enrollment advisement report, the requisite requirement report, and the reverse engineering report.

Short Description and Long Description

Enter descriptions for the condition specification that you want to establish. These descriptions are used for documentation purposes only.

Academic Institution

Select the academic institution. Each condition specification is associated with only one academic institution.

Connector Type	Select the main connector type for this condition specification. Values are: <i>None</i> , <i>AND</i> , and <i>OR</i> . (<i>None</i> converts to <i>AND</i> .) The connector type indicates the Boolean operator to be used in the equation that contains the condition lines.
Condition Line Sequence	This number indicates the order in which the condition lines are evaluated. The condition line sequence number is automatically assigned, but can be overridden by the user.
Condition Process Type	Select a condition process type. Values are: <i>Standard Condition</i>: Indicates that the condition is one of the delivered, standard conditions. This is the default field value. If you use this type, then the condition code field is available. <i>User Programmable Condition</i>: Indicates that the condition is a user programmable condition. If you select <i>User Programmable Condition</i>, the Condition Process Identifier field becomes available. If you select the condition process type <i>User Programmable Condition</i>, and the condition process identifier of Milestone Check, then you are presented with additional fields. Use these to specify the details about the milestone for use in this dynamic condition.

Condition Code

If you select the Condition Process Type field value of *Standard Condition*, then select one of the following delivered translate values:

None: Indicates no field value.

Academic Level: Indicates the year of study. For example, valid values include freshman and sophomore. This value is evaluated against the student based on whatever As of Date field value is specified at run time.

Academic Plan: Indicates the area of study, for example, a major or minor within the academic program. Some plans are subdivided into sub-plans. Academic Plan and Primary Academic Plan reference the exact same plan when the student has one plan only.

Academic Plans: Indicates that all of a student's plans are part of the equation.

Academic Program: Indicates the program of study to which a student applies and is admitted. *Academic Program* and *Primary Academic Program* reference the exact same program when the student has one program only.

Academic Programs: Indicates that all of a student's academic programs are part of the equation.

Academic Standing: Indicates a student's standing at the institution. For example, values might include good standing, probation, and dismissal. You define values in the Academic Standing table. This value is evaluated against the student based on the as of date that you specify at run time.

Academic Sub-Plan: Indicates a further specialization within the academic plan.

Academic Sub-Plans: Indicates that all of a student's sub-plans are part of the equation.

Cumulative Grade Point Average: A student's cumulative grade point average (derived from the students term history cumulative statistics, in conjunction with the processing as of date).

Dynamic Condition: Indicates a dynamic condition that has been previously created in the Define Dynamic Condition component.

Primary Academic Plan: Indicates a student's primary academic plan. The primary academic plan is designated by the lowest plan sequence number on the Student Plan page. For example, under a program of LAU, a student might have two plans, Psychology and Classics Minor. If Psychology has a plan sequence number of 10 and Classics Minor has a plan sequence number of 20, then Psychology is the primary academic plan. On the Student Plan page, student career number 0 is the primary career.

Important! The primary academic plan is designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is designated by the lowest career sequence number on the Student Program page. However, when a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number. For example, under a program of Liberal Arts Undergraduate (attached to a student career number of 0), a student has a plan of Psychology with a plan sequence number of 10. The same student has a plan of Art with a plan sequence number of 10 under a program of Fine Arts Undergraduate (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is Psychology, which is tied to a student career number of 0 through the Liberal Arts Undergraduate program. Primary Academic Program: Indicates a student's primary academic program. The primary academic program is the program designated by the lowest career sequence number. On the Student Program page, student career number 0 is the primary career.

Student Group: Indicates a grouping of students. For example, values might include athlete and veteran. You define values in the Student Group table.

Student Groups: Indicates that all of the student groups containing a student are part of the equation.

Test Score: Select to use a test score as a condition. If you select this field value, the following additional fields appear: Test ID, Test Component, Condition Operator, Test Score, Months Valid, and Test Score Method.

Months Valid and Test Score Method are editable according to the setup on the Define Tests for Advisement page.

If you select *User Programmable Condition*, the Condition Process Identifier field becomes available. Select the appropriate value for the condition process. The delivered values are: 0001 (Milestone Check), 0002 (Internal Degree Check), and 0003 (External Degree Check). Milestone Check verifies whether a milestone is completed, in progress, or not completed. Internal Degree Check verifies whether a student has received a degree from the home institution. External Degree Check verifies whether a student has received a degree from another institution.

Note. You can create additional condition process identifier field values in the Condition Processes table. Delivered field values are numbered from 1 through 500. Client-added values should be numbered above 500.

Condition Operator

Values are: *Equal*, *Greater Than*, *Greater or Equal*, *In*, *Less Than*, *Less or Equal*, *Not Equal*, and *Not In*. *None* is the same as *Equal*.

The operators of *In* and *Not In* are for use with requisite entity groups and so are available only when you select the following condition codes: *Academic Plan*, *Academic Plans*, *Primary Academic Plan*, *Academic Program*, *Academic Programs*, *Primary Academic Program*, *Academic Sub Plan*, *Academic Sub Plans*, *Student Group*, and *Student Groups*.

If you select the operator *In* or *Not In*, the Condition Data field prompts on requisite entity groups that you set up using the Requisite Entity Groups component.

Note. A student with a null set of entities is always considered true for all plurals of that entity for both *In* and *Not In* because the null set is included in all entity groups and all entity group complements.

Operators are not used if the precondition is *Dynamic Condition*. If the precondition is *Dynamic Condition*, then select one of the dynamic conditions that you previously created in the Define Dynamic Condition component.

Condition Data

The system prompts you with values based on your selections in the Condition Code and Condition Operator fields.

Academic Institution

If applicable, enter the academic institution. Each condition line detail is associated with only one academic institution.

Academic Career

If applicable, enter the academic career that contains the academic program that is associated with this condition line detail.

Academic Program

If applicable, enter the academic program that is associated with this condition line detail.

Academic Plan

If applicable, enter the academic plan that is associated with this condition line detail.

Milestone

Enter the milestone that must be achieved to satisfy this condition line detail. For example, a milestone could be an audition, qualifying exam, or thesis. You define milestones in the Milestone table.

Milestone Complete

Select the appropriate milestone. Values are:

None: Indicates that the field is not applicable.

Completed: Indicates that the student must complete this milestone to satisfy the condition line detail.

In Progress: Indicates that the student must be working towards completing the milestone to satisfy the condition line detail.

Not Completed: Indicates that the student must not have completed this milestone to satisfy the condition line detail.

Milestone Level Enter the minimum level for this milestone. Some examples of milestone levels are honors, undergraduate, or graduate.

Minimum Grade Points Enter the minimum grade points that are acceptable to complete this condition line detail.

Milestone Title Enter a descriptive phrase as the milestone title. Use this field for documentation purposes only.

If the condition process type is *User Programmable Condition* and the condition process identifier selected is *External Degree Check* or *Internal Degree Check*, the user then must select a degree.

Degree Enter the degree that must be obtained to satisfy the condition line.

If you select the condition process type of *standard condition* and the condition code of *Test Score*, the appearance of the page changes.

Test ID Select a Test ID from those defined on the Define Advisement Tests page.

Test Component The selection options are based on the Test ID selected.

Condition Operator Identifies what type of comparison is to be applied to the condition data. Possible condition operators include: *None*, *Less or Equal*, *Greater or Equal*, *Equal*, *Greater Than*, *Less Than*, and *Not Equal*. Make sure that you use an operator that makes sense in the equation. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Test Score Enter a score required for the test component and condition operator selected.

Months Valid The value indicates the number of months for which a test score is valid. This field is available for editing based on the setup on the Define Tests for Advisement page.

Test Score Method

Values are:

Average of All Scores Taken: Select to have the advisement engine average scores when it processes the tests for a condition in an enrollment requirement or requirement group.

First Test Taken: Select to have the advisement engine use the test score with the earliest date when it processes the tests for a condition in an enrollment requirement or requirement group.

Highest Score: Select to have the advisement engine use the highest score for a given test when it processes the tests for a condition in an enrollment requirement or requirement group.

Last Test Taken: Select to have the advisement engine use the score from the date of the last test taken when it processes the tests for a condition in an enrollment requirement or requirement group.

Lowest Score: Select to have the advisement engine use the lowest score for a given test when it processes the tests for a condition in an enrollment requirement or requirement group.

When you select the Calculate Test Score check box, other fields become available so that you can define the details of the calculation to be performed when the dynamic condition is used in an enrollment requirement or enrollment requirement group.

Test Component Taken Option

This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. Valid values are: *Tests Taken on Different Dates* and *Tests Taken on Same Date*.

Test ID

This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. These prompt from the Test IDs defined on the Define Advisement Tests page.

Condition Operator

This field appears in the Condition Details group box only when the Calculate Test Score check box is selected.

Identifies what type of comparison is to be applied to the condition data. Possible condition operators include: *None*, *Less or Equal*, *Greater or Equal*, *Equal*, *Greater Than*, *Less Than*, and *Not Equal*. Make sure that you use an operator that makes sense in the equation. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Calculation Method

This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. Valid values are: *Average of the Components* and *Sum of the Components*.

Score Required

This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. Enter a valid score required as it relates to the values selected in the preceding fields.

Months Valid	This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. This field is available for editing based on the setup on the Define Tests for Advisement page. The value indicates the number of months for which a test score is valid.
Test Score Method	This field appears in the Condition Details group box only when the Calculate Test Score check box is selected. Values are: <i>Average of All Scores Taken:</i> Select to have the advisement engine average scores when it processes the tests for a condition in an enrollment requirement or requirement group. <i>First Test Taken:</i> Select to have the advisement engine use the test score with the earliest date when it processes the tests for a condition in an enrollment requirement or requirement group. <i>Highest Score:</i> Select to have the advisement engine use the highest score for a given test when it processes the tests for a condition in an enrollment requirement or requirement group. <i>Last Test Taken:</i> Select to have the advisement engine use the score from the date of the last test taken when it processes the tests for a condition in an enrollment requirement or requirement group. <i>Lowest Score:</i> Select to use the lowest score for a given test when tests for a condition in an enrollment requirement or requirement group are processed.
Condition Line Sequence	Appears by default, starting with the number 1. Each condition line must have a unique condition line sequence value.
Test Component	This field appears in the Condition Lines group box only when the Calculate Test Score check box is selected. The selection options are based on the Test ID selected.
Minimum Score	This field appears in the Condition Lines group box only when the Calculate Test Score check box is selected. Enter the minimum acceptable score for the test component identified for the condition line sequence.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Creating and Using Expanded Conditions and Custom Conditions," Defining Custom Conditions

Defining Entity Groups for Use in Requisites (Optional)

This section discusses how to define entity groups for use in enrollment requisites.

Entity groups are similar items (programs, plans, subplans, or student groups) that are grouped together to be used in a condition. An example is that you have a requisite for a course that states a student must be enrolled in one of five plans to enroll in the course. To make this a simple condition, the five plans are placed into an entity group. When the condition is defined, it states that academic plans must be in the entity group. This allows for many similar objects to be grouped together for comparison.

Page Used to Define Enrollment Requisite Entity Groups

Page Name	Definition Name	Navigation	Usage
Define an Entity Group	SSR_RQ_ENTITY_GRP	Curriculum Management, Enrollment Requirements, Define Requisite Entity Groups, Define Requisite Entity Groups	Define the academic entity group to be used as a precondition or condition requirement.

Defining Requisite Entity Groups

Access the Define Requisite Entity Groups page (Curriculum Management, Enrollment Requirements, Define Requisite Entity Groups, Define Requisite Entity Groups).

Define Requisite Entity Groups

[Find](#) | [View All](#)
First 1 of 1 Last

Entity Group: 000015

Effective Date: 01/01/1900

Status: Active

Description: Fine Arts Majors

Short Description: Fine Arts

Long Description: Fine Arts Majors

Academic Institution: PSUNV

PeopleSoft University

Entity Group Type: Plan

Entity Group Item Detail

[Customize](#) | [Find](#)
First 1-4 of 4 Last

	Academic Plan	Description		
1	ART	Art (BFA)	+	-
2	ARTHIST	Art History (BFA)	+	-
3	DANCE	Dance (BFA)	+	-
4	MUS-BA	Music-BA	+	-

Define Requisite Entity Groups page

Note. Entity groups that are defined in this component are saved with a requirement usage code of ENR.

Entity Group	This system generated number is unique for each entity group. It can be used to build a condition at the enrollment requirement group or enrollment requirement level.
Effective Date	The latest effective date that you enter for the entity group is used during processing.
Academic Institution	Select the academic institution. Each entity group is associated with only one academic institution.
Description	Enter a description for the entity group. The description appears in the enrollment requirement group and enrollment requirement summaries.
Entity Group Type	Select the entity group type that indicates the type of items that are contained in the group. This field value determines what information appears in the Entity Group Item Detail group box. <i>Program</i> is the default value.

Entity Group Item Detail

This group box lists the details (entities) in this requisite entity group. An entity group item number is a sequential line number that the system automatically assigns to each item in the entity group. You can override the number. The system automatically supplies the description.

Defining Enrollment Requirement Groups

This section provides an overview of enrollment requirement group setup and discusses how to:

- Define enrollment requirement groups.
- Define overall requisite parameters.
- Define requisite details.
- Define requisite detail level parameters.

Understanding Enrollment Requirement Group Setup

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

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

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

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

Here is a high-level overview of how to create a simple enrollment requirement group or reserve capacity:

1. Create a description of the enrollment requirement group on the Course Requisite page.
2. Determine whether parameters such as minimum GPA, units, or number of courses are an attribute of the requirement on the Requisite Parameters page.
3. Enter any other parameters of the requisite such as a course, a range of courses, a student attribute (such as program or plan), and so on, on the Requisite Detail page.
4. Determine whether any course validation parameters exist for the requisite courses on the Requisite Detail Parameters page.
5. Attach the enrollment requirement group to a course offering on the Course Catalog - Offerings page (as a requisite); or attach the enrollment requirement group to a course on the Schedule of Classes - Reserve Cap (Schedule of Classes - Reserve Capacity) page (as a reserve capacity).

Pages Used to Define Enrollment Requirement Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Course Requisite	CRSE_REQUIS_RESTR	Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Course Requisite	Describe the enrollment requirement group. The system generates a unique numeric identifier for the group, although you can enter your own number for the group.
Requisite Parameters	CRSE_RQS_RSTR_PARM	Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Parameters	Specify overall GPA and unit requirements for all of the requisite detail lines in the group. The GPA, course and unit minimums that are entered apply to the overall course restrictions for the classes that are specified in the subsequent requirement pages.

Page Name	Definition Name	Navigation	Usage
Requisite Detail	CRSE_RQS_RSTR_DET	Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Detail	Link the actual courses or noncourse requirements to the enrollment requirement group. The page is similar to the Academic Requirement Group - Detail page in PeopleSoft Academic Advisement.
Requisite Detail Parameters	CRSE_RQS_DET_PRM	Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Detail Parameters	Further define the details of Course or Wild Card Course group line types.

Defining Enrollment Requirement Groups

Access the Course Requisite page (Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Course Requisite).

The screenshot displays the 'Course Requisite' page with the following data:

- Requirement Group:** 008047
- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Soc 100 Pre-Reqs
- *Short Description:** ERG 2
- *Long Description:** Requires PHILO 100 (3 units minimum grade of C) and HISTORY 100 (3 units minimum grade of C)
- *Report Description:** Soc 100 Pre-Reqs
- *Report Long Description:** Course A (SOC 100) requires Course B (PHILO 100) and Course C (HISTORY 100) 3 units min Grade C in each
- *Academic Institution:** PSUNV (PeopleSoft University)
- Academic Group:** (empty)
- Subject Area:** SOC (Sociology)
- Catalog Nbr:** 100 (Introduction to Sociology)
- ☒ **Enable Catalog Print**

Course Requisite page

Effective Date	Enter an effective date for this enrollment requirement group. The effective date must be equal to or less than the effective date of the course to which this course requisite is attached. Note. The system accesses the enrollment requirement group rules based on the start date of the term for which the requisite checking occurs. As long as your effective date is less than or equal to the term start date and the status is <i>Active</i> , the enrollment posting process checks this rule.
Status	Select a status for this enrollment requirement group. Select <i>Active</i> when adding a new enrollment requirement group. Select <i>Inactive</i> only if your institution no longer wants to use this enrollment requirement group. Note. If you want to inactivate an enrollment requirement group, you need to delete the number for that enrollment requirement group from each course to which it is attached on the Catalog Data page.
Description, Short Description, and Long Description	Enter a description, short description, and long description for the enrollment requirement group.
Report Description and Report Long Description	Enter a report description and long description for the enrollment requirement group to be used by the enrollment requirement checking processes.
Academic Institution	The system populates the academic institution field by default. You can change the value.
Academic Group, Subject Area, and Catalog Nbr (catalog number)	The system does not include these values in the analysis of the requirement group. These values are helpful tools for searching the database for the appropriate requirement group to attach to a course. You may want to use these fields to signify the course to which the requisite is attached, or to specify department ownership of the requisite.
Enable Catalog Print	Select this check box to display the long description of the enrollment requirement group in the course catalog.

Defining Overall Requisite Parameters

Access the Requisite Parameters page (Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Parameters).

Course Requisite

Requisite Parameters

Requisite Detail

Requisite Detail Parameters

Find | View All

First 1 of 1 Last

Requirement Group:008047

Description:Soc 100 Pre-Reqs

Effective Date:01/01/1900

Status:Active

Course Credit Parameters

Minimum GPA:

Minimum Units:

Minimum Courses:

Default for Detail Level

Min Grade Points/Unit:

Detail Selection Parameters

Connector Type

☒ AND

☐ OR

Requisite Parameters page

Course Credit Parameters

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

- Minimum GPA (minimum grade point average)

Enter the overall minimum GPA for classes that are selected to meet this requirement.
- Minimum Units

Enter the total minimum units for the classes that are selected to meet this requirement.
- Minimum Courses

Enter the total minimum courses for the requirement.

Default for Detail Level

- Min Grade Points/Units (minimum grade points/units)

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

Detail Selection Parameters

Connector Type

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

Defining Requisite Details

Access the Requisite Detail page (Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Detail).

Requisite Detail page

Refresh Parentheses

This button is available only when you add a new detail line. Click this button to refresh the parentheses setting. You cannot explicitly set parentheses to group detail rows.

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

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

Line

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

Group Line Type

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

The four group line types are:

- *Condition*

Specifies allowable values of data elements that are associated with a student, for example, a condition of *Academic Level*. When you specify a condition that you want to require in the Condition Code field, other fields appear that enable you to complete the condition statement. If you select the condition code *Dynamic Condition*, select a condition specification that was previously defined on the Define Requisite Conditions component. If you select the condition code *Test Score*, then you are presented with additional fields (Test ID, Test Component, Condition Operator, Test Score, Months Valid, and Test Score Method) based on the setup on the Define Tests for Requisites page.

- *Course*

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

- *Requirement*

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

You can view examples of how to use an academic requirement (as opposed to an enrollment requirement).

See *PeopleSoft Academic Advisement 9.0 PeopleBook*, "Setting Up Academic Requirements."

- *Wild Card Course*

Specifies a range of courses based upon subject area and catalog number, for example, wild card course of *English 1##*, where the range starts at any three-digit English course beginning with 1. Specify as few or as many criteria as you want using the Academic Group, Subject, and

Catalog Nbr fields. Blank fields return all values.

**Report Description and
Report Long Description**

Enter a report description and long description for the requisite detail to be used by the enrollment requirement checking processes. If neither of the fields is populated, the enrollment requirement checking processes generate a default description based on the data on the page.

This table show the way the fields on this page change, depending on the group line type that you select:

<i>Group Line Type</i>	<i>Fields That Appear</i>	<i>Fields That Are Hidden</i>
Condition	• Condition Code • Condition Operator • Condition Data Note. The Condition Operator and Condition Data fields appear after you select the condition code.	• Requisite Type • Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID • Requirement • Academic Group • Subject • Catalog Nbr • Test ID • Test Component • Condition Operator • Test Score • Months Valid • Test Score Method

Group Line Type	Fields That Appear	Fields That Are Hidden
Condition	If you select a condition code of <i>Dynamic Condition</i>: Condition Data	• Requisite Type • Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID • Requirement • Academic Group • Subject • Catalog Nbr (catalog number) • Test ID • Test Component • Condition Operator • Test Score • Months Valid • Test Score Method
Condition	If you select a condition code of test score: • Test ID • Test Component • Condition Operator • Test Score • Months Valid • Test Score Method	• Requisite Type • Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID • Requirement • Academic Group • Subject • Catalog Nbr (catalog number)

<i>Group Line Type</i>	<i>Fields That Appear</i>	<i>Fields That Are Hidden</i>
Course	• Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID	• Condition Code • Condition Operator • Condition Data • Requirement • Academic Group • Subject • Catalog Nbr • Test ID • Test Component • Test Score • Months Valid • Test Score Method
Requirement	Requirement	• Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID • Condition Code • Condition Operator • Condition Data • Academic Group • Subject • Catalog Nbr • Test ID • Test Component • Test Score • Months Valid • Test Score Method

<i>Group Line Type</i>	<i>Fields That Appear</i>	<i>Fields That Are Hidden</i>
Wild Card Course	• Academic Group • Subject • Catalog Nbr	• Course ID • Include Equivalent Courses • Term • Associated Class • Topic ID • Condition Code • Condition Operator • Condition Data • Requirement • Test ID • Test Component • Test Score • Months Valid • Test Score Method

Include Equivalent Courses

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

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

Term

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

Associated Class

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

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

See [Chapter 24, "Managing the Schedule of Classes," Defining Class Associations, page 580.](#)

Topic ID

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

Requisite Type

Specify whether this requirement line is a prerequisite or a corequisite. A prerequisite is something that a student must complete before the start date of the desired class. If you use an enrollment course list (as part of an enrollment requirement), you can allow in-progress coursework to fulfill prerequisites. A corequisite is something that a student can complete prior to, or at the same time as, the desired class. Conditions are always set up as prerequisites in the background. Students either meet the condition at the time of enrollment (which means that they currently have the required condition), or they do not.

Defining Requisite Detail Level Parameters

Access the Requisite Detail Parameters page (Curriculum Management, Enrollment Requirements, Enrollment Requirement Groups, Requisite Detail Parameters).

Course Requisite		Requisite Parameters		Requisite Detail		Requisite Detail Parameters	
Detail Parameters Find View All First 1 of 1 Last							
Requirement Group:	008047		Description:	Soc 100 Pre-Reqs			
Effective Date:	01/01/1900		Status:	Active			
Course Validation Parameters Find View All First 1 of 2 Last							
Course Information:	Introduction to Philosophy + -						
Minimum Units:	3.00		Min Units/Course:	3.00			
Minimum Courses:	1.00		Min Grade Points/Unit:	2.00			
Transfer Level Allowed:	Always Allow v						
Requirement Designation:	🔍						
Valid Begin:	📅		☐ Course must be GPA material ☒ Test Credit is Allowed ☒ Other Credit is Allowed ☐ Exclude In-Progress Credit				
Valid End:	📅						

Requisite Detail Parameters page

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

Minimum Units

Enter the minimum units that are required for the course or the wildcard course for this requisite detail line.

Min Units/Course (minimum units per course)

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

Minimum Courses

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

Min Grade Points/Unit (minimum grade points per unit)

Enter the minimum grade points per unit that each course must have to be used to satisfy the course requisite. For example, if you set this to 7, then each course must be a grade C or greater to be evaluated ($.7 \times 3 \text{ units} = 2.1$, or a grade of C).

Transfer Level Allowed

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

Always Allow: All applicable transfer credit can be used to satisfy the requisite.

Never Allow: Transfer credit can never satisfy the requisite.

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

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

See [Chapter 9, "Setting Up Transfer Credit Processing," Defining External Organizations, page 214.](#)

Requirement Designation

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

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

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 39.](#)

Valid Begin and Valid End

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

Course must be GPA Material

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

Test Credit is Allowed

Select this check box to allow test credit courses to be evaluated.

Other Credit is Allowed

Select this check box to allow other credit courses to be evaluated.

Exclude In-Progress Credit

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

Examples of Enrollment Requirement Groups

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

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

Course or Condition Requisite

At PSUNV, Psychology 288, Neuropsychology, requires that students have either passed Psychology 124 or declared a primary academic plan of psychology. In this example, Psychology 124 is a course prerequisite, and the primary academic plan of psychology is a condition prerequisite. Notice that for the condition, the Requisite Type field becomes unavailable for entry. This is because the system is populating the field to prerequisite in the background.

The Requisite Detail page has two requisite lines, joined together with an "or" statement:

The screenshot displays the 'Requisite Detail' page for 'Psych 288'. The page is divided into two main sections for the two lines of the requirement group.

Line 1 (Course Prerequisite):

- Requirement Group:** 000000
- Description:** Psych 288
- Effective Date:** 01/01/1900
- Status:** Active
- Group Line Type:** Course
- Course ID:** 003010 (Physiological Psychology)
- Requisite Type:** Pre-Requisite
- Include Equivalent Courses:** ☒

Line 2 (Condition Prerequisite):

- Group Line Type:** Condition
- Academic Institution:** PeopleSoft University
- Condition Code:** Primary Academic Plan
- Condition Operator:** Equal
- Condition Data:** PSYCH (Psychology)

The two lines are connected by an **OR** operator. The 'Requisite Type' field for the condition is disabled.

Setting up a course or condition prerequisite (CRSE_RQS_RSTR_DET)

Wild-Card Course Requisite

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

The Requisite Detail page would have two requisite lines, joined together with an "and" statement:

The screenshot shows the 'Requisite Detail' page with the following information:

- Requirement Group:** 000000, **Description:** Ed 338
- Effective Date:** 01/01/1900, **Status:** Active

Group Line Type (1-2 of 2):

- *Line:** 0010
- *Group Line Type:** Wild Card Course
- Academic Institution:** PeopleSoft University
- Academic Group:** LBART, College of Liberal Arts
- Subject:** EDUC, Education
- Catalog Nbr:** 2##
- Requisite Type:** Pre-Requisite

- *Line:** 0020
- *Group Line Type:** Course
- Course ID:** 003018, Learn Behv, PSYCH 240
- ☒ **Include Equivalent Courses**
- Requisite Type:** Pre-Requisite

The two lines are connected by an **AND** statement.

Setting up a wild card course and course prerequisite (CRSE_RQS_RSTR_DET)

Requirement, Course, and Course List Requisite

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

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

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

Course Requisite		Requisite Parameters		Requisite Detail		Requisite Detail Parameters	
Requirement Group:		000000		Description:		NeuroBiology 231	
Effective Date:		01/01/1900		Status:		Active	
Group Line Type				Find View All		1 of 1	
*Line:		NEW				+ -	
*Group Line Type:		Requirement					
Requirement:		000001169		Biology 1 and 2 Courses			
Requirement Usage:		Requisite/Restriction					
Requisite Type:		Pre-Requisite					

Using Requirement Line Types, Line 10 (CRSE_RQS_RSTR_DET)

On the preceding page:

- This requisite is considered first by the system because the line number is *0010*, the lowest number in our detail lines.
- The group line type is *Requirement*.
- The requirement is *Biology 1 and 2* (Biology 1 and Biology 2).

These are in a course list because they will be used repeatedly together as a prerequisite requirement in a large number of courses.

- The requisite type is *Pre-Requisite*.

The second and third detail lines appear like this:

Course Requisite		Requisite Parameters		Requisite Detail		Requisite Detail Parameters	
Requirement Group:		000000		Description:		NeuroBiology 231	
Effective Date:		01/01/1900		Status:		Active	
Group Line Type				Find View All		2 of 2	
Refresh Parentheses		AND		*Line:		NEW	
*Group Line Type:		Course					
Course ID:		001163		Elementary Chemistry I			
						☒ Include Equivalent Courses	
Requisite Type:		Pre-Requisite					

Using Course Line Types, Line 20 (CRSE_RQS_RSTR_DET)

On the preceding page:

- The connector type is *AND* because this rule must be fulfilled along with the Biology 1 and 2 requirement.
- The line number is *0020*. The system evaluates this rule second, because one rule line is preceding it.
- The group line type is *Course*.
- The course ID represents *Chemistry 101*.

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

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

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

To create an enrollment requirement group for this course prerequisite:

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

The screenshot displays the 'Requisite Detail' page of a software application. At the top, there are four tabs: 'Course Requisite', 'Requisite Parameters', 'Requisite Detail' (which is active), and 'Requisite Detail Parameters'. Below the tabs, there are navigation links: 'Find | View All', 'First', '1 of 1', and 'Last'. The main content area contains the following fields:

- Requirement Group:** 000000
- Description:** Honors 499
- Effective Date:** 01/01/1900
- Status:** Active

Below these fields is a section titled 'Group Line Type' with its own navigation links: 'Find | View All', '1 of 1', and '+' '-' buttons. Inside this section, there is a 'Refresh Parentheses' button and a '*Line:' dropdown menu set to 'NEW'. The main configuration area for the group line type includes:

- *Group Line Type:** Condition
- Academic Institution:** PeopleSoft University
- Condition Code:** Cumulative Grade Point Avg.
- Condition Operator:** > or =
- Condition Data:** 3.0

Creating a condition for cumulative GPA (CRSE_RQS_RSTR_DET)

For the second detail line, set the connector type to *And*, then select a group line type of *Wild Card Course*.

Creating a detail line for wild card course (CRSE_RQS_RSTR_DET)

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

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

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

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

Condition and Course Requisite, Exclude In-Progress Credit

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

To create an enrollment requirement group for this reserve capacity check:

1. On the Course Requisite page, enter the necessary data.
2. On the Requisite Parameters page, enter 1 in the Minimum Course field.
3. On the Requisite Detail page, create two detail lines and attach as a reserve capacity to Advanced Fiction Writing 2 on the Schedule of Classes - Reserve Cap page.
4. For the first detail line, create a condition of cumulative GPA greater than or equal to 3.0.

- For the second detail line, set the connector type to *And*, select a group line type of *Course*, select the course ID for Advanced Fiction Writing 1, and select a requisite type of *Pre-Requisite*.

The screenshot displays the 'Requisite Detail Parameters' page. At the top, there are tabs for 'Course Requisite', 'Requisite Parameters', 'Requisite Detail', and 'Requisite Detail Parameters'. The 'Requisite Detail' tab is active. Below the tabs, there is a header section with 'Requirement Group: 000000', 'Description: Advanced Fiction Writing 2', 'Effective Date: 01/01/1900', and 'Status: Active'. Below this is a 'Group Line Type' section with a 'Find | View All' button and a 'First 1 of 1 Last' indicator. The first detail line is a condition with a 'Refresh Parentheses' button, a '*Line: NEW' button, and a '*Group Line Type' dropdown set to 'Condition'. The 'Academic Institution' is 'PeopleSoft University', the 'Condition Code' is 'Cumulative Grade Point Avg.', the 'Condition Operator' is '> or =', and the 'Condition Data' is '3.0'. The second detail line is a course prerequisite with a 'Refresh Parentheses' button, a '*Line: NEW' button, and a '*Group Line Type' dropdown set to 'Course'. The 'Course ID' is '003334', which is linked to 'Adv Fict Writ I' and 'ENGLCOMP 555'. The 'Requisite Type' is 'Pre-Requisite', and the 'Include Equivalent Courses' checkbox is checked.

Creating a condition & course prerequisite (CRSE_RQS_RSTR_DET)

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

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

Course Requisite, Include In-Progress Credit

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

To create an enrollment requirement group for this requisite:

- On the Course Requisite page, enter the necessary data.
- On the Requisite Parameters page, enter 1 in the Minimum Course field.
- On the Requisite Detail page, create one detail line and attach as a requisite to ECON 205.
- For this detail line, select a group line type of *Course*, select the course ID for ECON 115, and select a requisite type of *Pre-Requisite*.

- On the Requisite Detail Parameters page, enter a minimum grade point per unit of 2.00 and leave cleared the Exclude In-Progress Credit box.

Creating a course prerequisite detail Line (CRSE_RQS_RSTR_DET)

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

Condition Requisite, Include In-Progress Coursework

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

To create an enrollment requirement group for this requisite:

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

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

The screenshot shows the 'Requisite Detail Parameters' window. At the top, there are tabs: 'Course Requisite', 'Requisite Parameters', 'Requisite Detail' (selected), and 'Requisite Detail Parameters'. Below the tabs, there is a header bar with 'Find | View All' and navigation buttons. The main area displays the following information:

- Requirement Group:** 000000
- Description:** EDUC 100
- Effective Date:** 01/01/1900
- Status:** Active

Below this, there is a section titled 'Group Line Type' with its own 'Find | View All' and navigation buttons. Inside this section, the following fields are visible:

- *Line:** NEW
- *Group Line Type:** Condition
- Academic Institution:** PeopleSoft University
- Condition Code:** Cumulative Grade Point Avg.
- Condition Operator:** > or =
- Condition Data:** 3.5

Creating a condition for cumulative GPA (CRSE_RQS_RSTR_DET)

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

Example of Maximum Unit Limit for Enrollment

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

To create this maximum unit enrollment requisite:

1. Create an enrollment course list that references all physical education courses (wild card or course by course).

Set up any course parameters. Enter minimum grade point per unit values for each course if you want to count only physical education courses that were successfully completed. If you also want to limit F graded courses, you can leave this field clear.

2. Create an academic requirement that has a line item page line type of *Course Requirement*.
3. Set the Credit Include Mode field to *Verify*, and the Maximum Units Allowed field to *12.00*.

Be sure this is set to *Verify*. This is the power that regular ENR usage enrollment requirements do not have.

4. Point to your enrollment course list on the Line Item Detail page.
5. Create an enrollment requirement group that points to the academic requirement.

Attach this requirement as a corequisite.

Course Requisite		Requisite Parameters		Requisite Detail		Requisite Detail Parameters	
Requirement Group:	000000	Description:	Phys Ed Limit				
Effective Date:	07/28/2004	Status:	Active				
Group Line Type		Find View All 1 of 1					
*Group Line Type:	Requirement	*Line:	NEW				
Requirement:	000001169	Phys Ed Limit					
Requirement Usage:	Requisite/Restriction						
Requisite Type:	Co-Requisite						

Requisite Detail page (CRSE_RQS_RSTR_DET)

Attach this enrollment requisite to all physical education courses.

Defining Enrollment Requirements

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

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

Understanding Enrollment Requirements

Enrollment requirements are for more complicated requisite needs, and are also great tools for reusability. Create enrollment requirements only if you are using the *Requirement* group line type in an enrollment requirement group. You can use enrollment requirements in conjunction with other enrollment-requirement group line types.

To fully understand enrollment requirements, read "Setting Up Academic Requirements" in the *PeopleSoft Academic Advisement 9.0 PeopleBook*. The pages in PeopleSoft Academic Advisement mirror those in Student Records but with additional functionality. You can set up enrollment requirement groups that reference academic requirements (in the event that you need to take advantage of their complex functionality), so we suggest that you learn as much about them as possible.

Here is a high-level overview of how to define an enrollment requirement:

1. Evaluate your need to use the group line type of *Requirement* on the Requisite Detail page.

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

Note. If you are going to select the line type of condition and specify a dynamic condition or test score, then you must first have set up dynamic conditions and valid test IDs on the Define Requisite Conditions component and Define Tests for Requisites component, respectively.

Pages Used to Define Enrollment Requirements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Requirement	CRSE_REQUIREMENT	Curriculum Management, Enrollment Requirements, Enrollment Requirements, Enrollment Requirement	Describe the enrollment requirement.
Parameters	CRSE_RQRMNT_PARM	Curriculum Management, Enrollment Requirements, Parameters	Enter overall GPA and unit requirements for the requirement.
Line Item	CRSE_RQRMNT_LINE	Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item	Define the requirement line type.
Line Item Parm (line item parameters)	CRSE_RQ_LINE_PARM	Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item Parm	Specify the unit and GPA requirements for the line type. The fields that appear on the page depend on the line type that you select on the Line Item page.
Line Item Detail	CRSE_RQ_LN_DETAIL	Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item Detail	Link course lists, derived course lists, and conditions to your line items. The page controls that appear on the page depend on the line type that you select on the Line Item page.

Defining Enrollment Requirements

Access the Enrollment Requirement page (Curriculum Management, Enrollment Requirements, Enrollment Requirements, Enrollment Requirement).

Enrollment Requirement		Parameters	Line Item	Line Item Parm	Line Item Detail
Find View All First 1 of 1 Last					
Academic Requirement:	000001220				
*Effective Date:	01/01/1900			*Status:	Active
Requirement Name:	Econ 100 Level Courses			*Short Description:	Econ 100s
Description:	ER - D Econ 100 Level Courses				
*Report Description:	ER - RD Econ 100 Level Courses				
*Report Long Description:	ER - RLD Take ECON 100 Level Courses				
*Academic Institution:	PSUNV	PeopleSoft University			
Academic Group:	LBART	College of Liberal Arts			
Subject Area:	ECON	Economics			
Catalog Nbr:					

Enrollment Requirement page

Effective Date

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

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

Status

Select a status for this requirement. Select *Active* when you add a new requirement. Select *Inactive* only if your institution will no longer use this requirement.

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

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

See Chapter 7, "Setting Up Enrollment Requisites," *Generating a Reverse Engineering Report*, page 187.

Report Description and Report Long Description

Enter a report description and long description for the enrollment requirement to be used by the enrollment requirement checking processes.

The report fields are hidden when the group line type is set to *Requirement*. In this case, the report descriptions are defined within the Enrollment Requirements component.

Academic Institution	The system populates this field by default when you access the page. You can change this value. The institution determines the enrollment requirement groups that can reference this requirement.
Academic Group, Subject Area, and Catalog Nbr (catalog number)	Academic group, subject, and catalog number are not used by the system in the analysis of the requirement, but are helpful tools for when you are searching the database for the appropriate requirement to attach to an enrollment requirement group. You may want to use these fields to signify the course to which the requisite will be attached, or to specify department "ownership" of the requisite. These values are optional.

Defining Overall Enrollment Requirement Parameters

Access the Parameters page (Curriculum Management, Enrollment Requirements, Enrollment Requirements, Parameters).

Enrollment RequirementParametersLine ItemLine Item ParmLine Item Detail

Find | View AllFirst1 of 1Last

Academic Requirement:000001220Description:Econ 100 Level Courses

Effective Date:01/01/1900Status:Active

Course Credit Parameters

Minimum GPA:

Minimum Units:

Minimum Courses:

Default for Detail Level

Min Grade Points/Unit:

Detail Selection Parameters

Connector Type

☒ AND☐ OR

Parameters page

Course Credit Parameters

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

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

Minimum Courses

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

Default for Detail Level**Min Grade Points/Unit**
(minimum grade points per unit)

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

Detail Selection Parameters**Connector Type**

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

Defining Enrollment Requirement Line Types

Access the Line Item page (Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item).

Enrollment Requirement | Parameters | **Line Item** | Line Item Parm | Line Item Detail

Find | View All | First 1 of 1 Last

Academic Requirement: 000001220 **Description:** Econ 100 Level Courses
Effective Date: 01/01/1900 **Status:** Active

Line Item Find | View All | First 1 of 1 Last

Refresh Parentheses Line: 0010 + -

***Line Type:** Course Requirement

Line Name: LI-LN Econ 100 Level Courses ***Short Description:** Econ 100 L

Description: LI - D Complete two of the following courses (minimum grade of B in each):
ECON 120, ECON 140, ECON 142, ECON 150

***Report Description:** LI - RD Econ 100 Level Courses

***Report Long Description:** LI - RLD Complete two of the following courses (minimum grade of B in each):
ECON 120, ECON 140, ECON 142, ECON 150

Line Item page

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

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

Each line type value is defined in the *PeopleSoft Academic Advisement 9.0 PeopleBook*.

See *PeopleSoft Academic Advisement 9.0 PeopleBook*, "Setting Up Academic Requirements," Creating a Requirement Line Item.

Report Description and Report Long Description Enter a report description and long description for the line item to be used by the enrollment requirement checking processes.

Defining Line Item Parameters

Access the Line Item Parm page (Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item Parm).

The screenshot shows the 'Line Item Parm' page. At the top, there are tabs: 'Enrollment Requirement', 'Parameters', 'Line Item', 'Line Item Parm' (selected), and 'Line Item Detail'. Below the tabs is a header bar with 'Find | View All' and 'First 1 of 1 Last'. The main content area has the following fields:

- Academic Requirement:** 000001220
- Description:** Econ 100 Level Courses
- Effective Date:** 01/01/1900
- Status:** Active

Below these is a section titled 'Line Item Parameters' with a sub-header 'Find | View All' and 'First 1 of 1 Last'. It contains:

- Line Nbr:** 0010
- Description:** LI-LN Econ 100 Level Courses

At the bottom is a section titled 'Course Credit Parameters' with the following fields:

- Minimum GPA:** 3.000
- Minimum Units:** 6.00
- Minimum Courses:** 2.00
- Maximum Units Allowed:** (empty field)
- Maximum Courses Allowed:** (empty field)
- Min Grade Points/Unit:** 3.00

Line Item Parm page (when the line type is Course Requirement)

If the line type is *Condition*, no fields appear on the Line Item Parm page.

Minimum GPA (minimum grade point average)

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

Minimum Units

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

Minimum Courses

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

Maximum Units Allowed

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

Maximum Courses Allowed

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

Min Grade Points/Unit
(minimum grade points per unit)

Enter the minimum grade points per unit that each course must have to satisfy the enrollment requirement. For example, if you set this to 2.0, then each course that is evaluated must be a grade C or greater. If a course is evaluated that does not meet this minimum, the requisite is not satisfied.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements," Specifying Requirement Line Item Parameters

Defining Line Item Course Detail

Access the Line Item Detail page (Curriculum Management, Enrollment Requirements, Enrollment Requirements, Line Item Detail).

Enrollment RequirementParametersLine ItemLine Item ParmLine Item Detail

Find | View AllFirst1 of 1Last

Academic Requirement:000001220Description:Econ 100 Level Courses

Effective Date:01/01/1900Status:Active

Line ItemFind | View AllFirst1 of 1Last

Line Nbr:0010Description:LI-LN Econ 100 Level Courses

Line Item DetailFind | View AllFirst1 of 1Last

*Line Detail Sequence:1*Line Detail Type:CLSTCourse List

Course List:000000244Econ 100 level coursesView

Line Item Detail page (when the line type is Course Requirement)

Line Detail Sequence

The system assigns a sequential number to a specific line detail. You can have multiple detail line sequences under a single line number. The line detail sequence affects the order in which the system evaluates each line item detail. Those with the lowest number are evaluated first.

Line Detail Type

Select the line detail type value that indicates the type of line detail. Values are:

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

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

Course List

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

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Derived Course List	Appears with a line detail type of <i>DLST</i> . Enter the derived course list that indicates a type of class that the system can draw from a subset of the student's transcript or academic record.
List Include Mode	Appears if you have multiple line item detail rows. Indicates how a previous line detail sequence interacts with a new line detail sequence. (This field is available for every line except the first one.) Choices include: <i>Y</i> , indicating union; <i>I</i> , indicating intersection; and <i>N</i> , indicating subtraction.
List Recall Mode	Appears with a line detail type of <i>DLST</i> . Indicates the conditions that the system uses to select courses from the student's transcript.
View	Appears with a line detail type of <i>CLST</i> . Click the View button to access the course list summary where you can review the course list details.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements," Setting Up Requirement Line Item Detail

Defining Enrollment Course Lists

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

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

Understanding Enrollment Course Lists

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

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

Here is a high-level overview of how to define an enrollment course list:

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

3. Enter the parameters of each course list on the Course List Parameters page.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Course Lists"

Pages Used to Create Enrollment Course Lists

Page Name	Definition Name	Navigation	Usage
Course List Description	RQ_COURSE_LIST_ENR	Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Description	Describe the course list.
Course List Detail	RQ_CRSE_LIST_DET	Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Detail	Link the actual courses to the course list. A course is specified either by a unique course ID or by using the wild card indicator.
Course List Parameters	RQ_CRSE_LST_DPR2	Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Parameters	Define the details of units, GPA, and other information for each course in the course list.

Creating Course List Descriptions

Access the Course List Description page (Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Description).

Course List Description page

Course List

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

Effective Date

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

Status

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

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

Academic Institution

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

Academic Career, Academic Group, Subject Area, and Catalog Nbr (catalog number)

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

Linking Courses to the Course List

Access the Course List Detail page (Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Detail).

The screenshot shows the 'Course List Detail' page with the following information:

- Course List:** 000000127
- Description:** ART 140 and 142
- Effective Date:** 01/01/1900
- Status:** Active

The 'Course List Details' section contains two rows of course information:

*Course Sequence:	Course ID:	Description	ART	
1	001168	2D Design	ART	140
2	001167	Three Dimensional "3D" Design	ART	142

Each row includes a 'Wildcard Indicator' checkbox (unchecked) and an 'Include Equivalent Courses' checkbox (checked). Navigation buttons like 'Find', 'First', '1-2 of 2', and 'Last' are also visible.

Course List Detail page

Fetch

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

Course Sequence

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

Wildcard Indicator

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

Academic Group

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

Subject

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

Catalog Nbr (catalog number)	Appears if you select the WildCard Indicator check box. Enter the required portion of the catalog number that is up to ten characters (NNNNAAAAAA), where the first four characters are numeric (leading zeroes are blank padded) and the last six characters are an alphanumeric suffix. For example, a catalog number of 3## indicates that any 300-level course is acceptable, including 301A, because suffixes are ignored when a number wild card is specified unless a suffix value is exclusively indicated.
Course ID	If the WildCard Indicator check box is cleared, use this field to specify the exact course ID.
Include Equivalent Courses	Select for the system to include in its evaluation both the course ID that you specify and all courses that are set up as equivalent to the selected course ID for this requisite. If you select this check box, the following fields become unavailable: Term, Associated Class, and Topic ID. Clear this check box to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you can specify not only the course ID, but also the term in which the specific course must be taken.
Term	Enter the term in which the student must take the course that you specify for the course to be used in this enrollment course list. Leave this field blank to return all values.
Associated Class	Enter the associated class number (of the course that you specify) that the student must take for the course to be used in this enrollment course list. For class associations, indicate a term to prompt off valid values. Leave this field blank to return all values. Note. You cannot enter 9999, because this special associated class number can be associated with any other associated class number and is never an enrollment section. See Chapter 24, "Managing the Schedule of Classes," Defining Class Associations, page 580.
Topic ID	Enter the topic ID (of the course that you specify) that the student must take in order for the course to be used in this enrollment course list. This field prompts from the topics that are defined in the course catalog. Leave this field blank to return all values.

Defining Details of Courses in the Course List

Access the Course List Parameters page (Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Parameters).

Course List Description		Course List Detail		Course List Parameters	
Find View All 1 of 1					
Course List:	000000127	Description:	ART 140 and 142		
Effective Date:	01/01/1900	Status:	Active		
Course Information Find View All 1 of 2					
Course Information:	2D Design + -				
Min Units/Course:	2.00				
Min Grade Points/Unit:	2.00				
Transfer Level Allowed:	Always Allow ▾				
Requirement Designation:	SR1T 🔍	Research Project: Optional			
Valid Begin:	📅	☐ Course must be GPA material			
Valid End:	📅	☒ Test Credit is Allowed			
		☒ Other Credit is Allowed			
		☐ Exclude In-Progress Credit			

Course List Parameters page

Min Units/Course (minimum units per course)

Enter the minimum number of units that the course to which this line refers must be worth to be used in the course list or as a wild card course. For example, if you set this to 3, the system uses only courses for this line that are worth three units each or greater. If the system finds a course on the student's record that meets the course list, but it is only two units, the course cannot be used to satisfy this requirement.

Min Grade Points/Unit (minimum grade points per unit)

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

Transfer Level Allowed

Enter a value that indicates what type of transfer credit (if any) is acceptable. Values are:

Always Allow: All applicable transfer credit can be used to satisfy the requisite.

Never Allow: Transfer credit can never satisfy the requisite.

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

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

Requirement Designation	Select the requirement designation that the course or wild card course must have. For example, if you specify a wild card course of <i>ARCH 4##</i> on the Course List Detail page, then specify a requirement designation of <i>DSGN</i> on the Course List Parameters page. Only ARCH 400 - level courses that have a designation of <i>DSGN</i> (with a grade of Satisfied) meet this requisite. Requirement designation values are defined on the Requirement Designation Table page. See Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Requirement Designations, page 40.
Valid Begin and Valid End	Enter dates to specify the range of dates when the course must be taken to satisfy the requisite. Leaving these fields blank means that the courses can be taken anytime. When the system compares the date range, it uses the start and end date of the term in which the course was taken. For transfer courses, the system uses the start and end date of the articulation term.
Course must be GPA material (course must be grade point average material)	Select to require that the course taken for this requisite be applied toward the student's career grade-point-average calculation. For instance, any courses that a student took for a pass or no pass grade basis could not be used to meet this requisite if this grade basis does not have the Include in GPA check box selected on the Grading Scheme table page.
Test Credit is Allowed	Select to allow test credit courses to be evaluated.
Other Credit is Allowed	Select to allow other credit courses to be evaluated.
Exclude In-Progress Credit	If the course taken to satisfy this course list must be fully graded for the system to consider it valid, select this check box. If this check box is cleared, the system will include in analysis and "pass" all parameters any non-graded course, as well as any graded course that has the In-Progress flag turned on (such as Incomplete), and that match the course ID or wild card course on the Requisite Detail page. Leaving this check box cleared is the least restrictive, and allows for maximum user/student flexibility.

Viewing Enrollment Requisite Summary Information

This section lists the pages used to:

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

See Also

[Chapter 7, "Setting Up Enrollment Requisites," Defining Enrollment Requirement Groups, page 148](#)

[Chapter 7, "Setting Up Enrollment Requisites," Defining Enrollment Requirements, page 171](#)

[Chapter 7, "Setting Up Enrollment Requisites," Defining Enrollment Course Lists, page 179](#)

Pages Used to View Enrollment Requisite Summary Information

Page Name	Definition Name	Navigation	Usage
Enrollment Requisite Summary	ADVIS_RQ_GRP_SUMM	Curriculum Management, Enrollment Requirements, Enrollment Requisite Summary, Enrollment Requisite Summary	View enrollment requirement group rules. This page is shared with the Academic Advisement application.
Requirement Group Description	RQS_SUMM_DESC	Click the requirement group description link on the Enrollment Requisite Summary page.	View a summary of requisite description information. This page is shared with the Academic Advisement application.
Enrollment Requirement Summary	ADVIS_RQ_SUMMARY	Curriculum Management, Enrollment Requirements, Enrollment Requirement Summary, Enrollment Requirement Summary	View enrollment requirement rules. This page is shared with the Academic Advisement application.
Requirement Description	RQ_SUMM_DESC	Click the requirement description link on the Enrollment Requirement Summary page.	View a summary of enrollment requirement rules. This page is shared with the Academic Advisement application.
Requirement Line Description	RQ_LN_SUMM_DESC	Click the requirement line description link on the Enrollment Requirement Summary page.	View a summary of enrollment requirement rules. This page is shared with the Academic Advisement application.
Course List Summary	RQ_COURSELIST_SUMM	Curriculum Management, Enrollment Requirements, Course List Summary, Course List Summary	View the courses within an enrollment course list. This page is shared with the Academic Advisement application.
Course Description	CLST_SUMM_DESC	Click the course description link on the Course List Summary page.	View the course ID and description for each requisite course. This page is shared with the Academic Advisement application.

Generating a Reverse Engineering Report

This section provides an overview of the Reverse Engineering Report and discusses how to generate the report.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Maintaining Academic Advisement Setup Data," Producing a Reverse Engineering Report

Understanding the Reverse Engineering Report

Use the Reverse Engineering Report page to search for a requirement, course, course list, or condition that the system is using. You can search to find out which requirement group contains a specific requirement; which course list contains a specific course; which requirement contains a specific course list; and which requirement group, requirement, or requirement line contains a specific condition.

The Reverse Engineering reports include enrollment and academic advisement requirement groups, requirements, and course lists.

To produce a Reverse Engineering report:

1. Enter the report type and any other general parameters on the Reverse Engineering Report page.
2. Click the Run button to process the report.

Page Used to Generate a Reverse Engineering Report

Page Name	Definition Name	Navigation	Usage
Reverse Engineering Report	RUNCTL_SRREVENG	- Academic Advisement, Advisement Reports, Reverse Engineering - Curriculum Management, Enrollment Requirements, Reverse Engineering Report	Enter the parameters that are to capture the data that you want to review. Select a report type to enable the page to display the appropriate parameter fields.

Generating the Enrollment Requirement Group Report

This section provides an overview of the enrollment requirement group report and discusses how to generate the report.

Understanding the Requirement Group Report

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

Here is a high-level overview of how to run the requirement group report:

1. Enter your processing parameters for the requirement group report.
2. Specify details about how much or little you want to print about each enrollment requirement group.
3. Click the Run button to process the report.

Page Used to Generate the Requirement Group Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Requirement Group Report	RUNCTL_SRENRADV	Curriculum Management, Enrollment Requirements, Requirement Group Report, Requirement Group Report	Enter your processing parameters for the requirement group report.

Generating the Requirement Group Report

Access the Requirement Group Report page (Curriculum Management, Enrollment Requirements, Requirement Group Report, Requirement Group Report).

Requirement Group Report

Run Control ID: PSTEST

Report ManagerProcess MonitorRun

*As of Date: 12/21/2009 ⓘ
Requirement Group: ⓘ
Academic Institution: PSUNV ⓘ PeopleSoft University
Academic Group: ⓘ
Subject: ⓘ
Catalog Nbr: ⓘ
☐ Honor Blank Values:

Description Options

Print Group Level: Standard ▼
Print Requirement Level: Standard ▼
Print Line Level: Standard ▼
Print Course Level: Standard ▼

Detail Options

☒ Print Group Level
☒ Print Requirement Level
☒ Print Line Level
Course List Detail Level: List and Courses ▼

Requirement Group Report page

As of Date	The system automatically populates this field with the current date, but you can modify it. The report accurately reflects the requirements contained in the specified requirement group (or requirement groups that meet the search criteria) as of this date.
Requirement Group	Enter the requirement group for this report. Each enrollment requirement group consists of detail lines pointing to conditions, courses, or requirements as well as parameters that include unit and course requirements. Note. If you enter a requirement group number, then the remaining search fields on the page become unavailable. If you do not enter a requirement group number, then the remaining search fields are available for entry and you can use them to identify a set of enrollment requirement groups.
Academic Institution, Academic Group, Subject, Catalog Nbr (catalog number)	Enter the institution, group, subject, or catalog number for which you want to report related enrollment requirement groups. Leave this field blank to return all values (wild card).

Honor Blank Values

Select to indicate that the blank fields on this page represent actual values. For example, if the check box is selected and the Academic Group field is left blank, then the report does not contain enrollment requirement groups with an academic group because no academic group has been specified. If the check box is not selected, the blank field acts as a wild card and every enrollment requirement group with an academic group in the specified academic institution is contained in the report.

Description Options

Use this group box to control how descriptions are presented in the summary report.

Values for these fields are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Print Group Level

Select the type of requirement group description to be included in the report. Values are:

- *All*: Indicates that the standard, short, and long descriptions on the Requirement Group page, plus the catalog description print on the report.
- *Catalog*: Indicates that the description on the Requirement Group page prints on the report.
- *All Excpt Cat*: Indicates that the standard, short, and long descriptions on the Requirement Group page print on the report.
- *Long*: Indicates that the long description on the Requirement Group page prints on the report.
- *Standard*: Indicates that the description on the Requirement Group page prints on the report. This value appears by default.

**Print Requirement Level,
Print Line Level , Print
Course Level**

Select the type of requirement level, requirement line, and course list description to be included in the report. Values are:

- *All*: Indicates that the standard, short, and long descriptions on the Requirement page, Requirement Line Item page, or Course List Description page print on the report.
- *Long*: Indicates that the long description on the relevant page prints on the report.
- *Standard*: Indicates that the description on the relevant page prints on the report. This value appears by default.

Detail Options

Use this group box to control how details are presented in the summary report.

Print Group Level, Print Requirement Level , Print Line Level

Select to print the requirement group detail, requirement detail, or line detail on the report. If the check box is cleared, no group detail prints.

Course List Detail Level

Select how the course list detail should appear in the report. Values are:

- *None*: Converts to List and Courses.
- *List and Courses*: Indicates that the course list, plus specific courses print on the report. This value appears by default.
- *List and Courses with Detail*: Indicates that the course list, plus specific courses with detail print on the report.
- *List Only*: Indicates that only the course list prints on the report.
- *List Only with Detail*: Indicates that the course list with detail prints on the report.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Generating the Requirement Report

This section provides an overview of the enrollment requirement report and discusses how to generate the report.

Understanding the Requirement Report

The Requirement report lists the contents (or structure) of a specific enrollment requirement or all of the academic requirements that meet the criteria established for the report. This report is an easy way to verify the academic requirements that you have defined for enrollment requisites. For example, if you need a printout of all of the enrollment requirements that are defined at PSUNV with an academic group of LBART you can run this report.

While preparing to print this report, you can request that the requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the requirement advisement report appear on the report.

Here is a high-level overview of how to run the requirement group report:

1. Select the academic requirement or enter other general parameters on the Requirement Report page.
2. Enter the description and detail options.
3. Click the Run button to generate the report.

Page Used to Generate the Requirement Report

Page Name	Definition Name	Navigation	Usage
Requirement Report	SSR_RUNCTL_RQR_ADV	Curriculum Management, Enrollment Requirements, Requirement Report, Requirement Report	Enter your processing parameters for the requirement report.

Generating the Requirement Report

Access the Requirement Report page (Curriculum Management, Enrollment Requirements, Requirement Report, Requirement Report).

Requirement Report

Run Control ID: 1

Report ManagerProcess MonitorRun

*As of Date:12/03/2009

Academic Requirement:

Academic Institution:PSUNVPeopleSoft University

Academic Group:

Subject:

Catalog Nbr:

☐ Honor Blank Values

Description Options

Print Requirement Level:Standard

Print Line Level:Standard

Print Course Level:Standard

Detail Options

☐ Print Requirement Level

☐ Print Line Level

Course List Detail Level:List and Courses

Requirement Report page

As of Date

The system automatically populates this field with the current date, but you can modify it.

The report accurately reflects the requirement lines in the specified requirement (or requirements that meet the search criteria) as of this date.

Academic Requirement

Enter the requirement for this report. Each enrollment requirement consists of detail lines pointing to conditions as well as parameters that include unit and course requirements.

Note. If you enter a requirement number, then the remaining search fields on the page become unavailable. If you do not enter a requirement number, then the remaining search fields are available for entry and you can use them to identify a set of enrollment requirements.

For information about other fields on this page, refer to the field descriptions for the Requirement Group Report page in the previous section.

Generating the Entity Group Table and Condition Table Reports

The Entity Group Table report and Condition Table report display all the information about the appropriate data defined in the tables for the particular institution and the as of date.

To generate an Entity Group Table or Condition Table report:

1. Select the as of date and institution on the Entity Group Table and Condition Table Reports page for which you want to report conditions.
2. Click the Run button.
3. Select either the Condition Table Report or the Entity Group Table Report process to specify the report type.
4. Click the OK button to process the report.

Page Used to Generate the Entity Group Table and Condition Table Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Entity Group Table and Condition Table Reports	SSR_RUNCTL_MIS_RPT	Curriculum Management, Enrollment Requirements, Miscellaneous Requisite Report, Entity Group Table and Condition Table Reports	Process one or both enrollment requirement administrative reports: the Entity Group Table report and the Condition Table report. The Entity Group Table report lists all the entity groups for the institution based on the as of date that you enter. The Condition Table report lists all the dynamic conditions for the institution based on the as of date that you enter.

Processing the Entity Group Table and Condition Table Reports

Access the Entity Group Table and Condition Table Reports page (Curriculum Management, Enrollment Requirements, Miscellaneous Requisite Report, Entity Group Table and Condition Table Reports).

Entity Group Table and Condition Table Reports

Run Control ID: DS1

[Report Manager](#) [Process Monitor](#)

Run

*As of Date:

12/08/2009

*Academic Institution:

PSUNV

PeopleSoft University

Entity Group Table and Condition Table Reports page

As of Date

The report accurately reflects the retrieved information as of this date. This field is automatically populated with the current date, but you can modify it. A value is required in this field.

Chapter 8

Setting Up Instructor Workload

This chapter provides an overview of instructor workload and discusses how to implement instructor workload setup tables.

See Also

[Chapter 25, "Tracking Instructor Workload," page 623](#)

Understanding Instructor Workload

Higher-education institutions, particularly community colleges, need to set maximum limits on the workload that is assigned to faculty and other individuals. These institutions also need to track and report actual workload assignments. To accommodate these needs, Student Records has a feature called Instructor Workload, which performs full-time equivalency tracking.

The Instructor Workload feature enables you to monitor the instructional and non-instructional workload for selected faculty, instructors, and staff. This feature enables you to define workload limits for groups or individuals. In addition, you can define multiple types of instructional and non-instructional work assignments, using different workload standards for each type of assignment. You can have separate workload upper limits for part-time and full-time individuals and can set automated controls that prevent workload assignments beyond those limits.

If you use the Instructor Workload feature, the system automatically updates full-time equivalency workload values when you enter data on the class scheduling pages. You can also use a background process to copy workload data from one term to another, to update term workload records, or to produce a simple report.

Note. The term *instructor* predominates in this PeopleBook and in field names on pages, but it can include any individual with an employee ID at the institution. Advisors, teaching assistants, and even students can be tracked using this feature. This information is entirely user-defined.

The formulas described in the following sections are the two primary calculations that the Instructor Workload feature performs to update an individual's total term full-time equivalency percentage. Refer to these formulas for clarification when you are familiar with all of the setup pages.

Course Component Workload Hours Formula

The Instructor Workload feature uses the following formula to calculate the default workload hours of a course component on the Meetings page:

$$[(\text{academic progress units} \times \text{assigned percent}) + (\text{component workload hours} \times \text{assigned percentage})]$$

$\times (\text{subject/component multiplier}) \times (\text{instructor term multiplier}) \times (\text{load factor})$

Note. The system supplies the multiplier values to 100 percent by default if the user does not specify them.

At the academic institution level (Academic Institution 4 page), workload hours for courses are a combination of *academic progress units* and *component workload hours* (for example, 0 percent academic progress units and 100 percent component workload hours). Workload hours for noncourses are entered directly on the Term Workload page.

The Academic Subject Table has a *subject/component multiplier* specific to both the subject and component (for example, math laboratory component multiplier 80 percent, math lecture component 110 percent, math independent study component 50 percent, and so on).

The Term Workload page has an *instructor term multiplier* that is supplied by default from the Instructor Assignment Class table.

To divide one course component into more than one assignment, you can use a load factor. Inserting multiple rows per course component and assigning each one a load factor (percentage) enables you to divide a component into different assignment types, divide a component among instructors, or both. For example, you might assign instructor A to teach 30 percent of the lecture component, and instructor B to teach 70 percent of the lecture component. The user is responsible to set the load factor. The total load factor for one course component should equal 100 percent.

Note. You must manually enter workload hours for all assignments that are made directly on the Term Workload page. In other words, the system does not supply these types of manual noncourse-based assignments by default using the previous calculation.

In the following example, instructor A is sharing the teaching load for Math 200 with another instructor. This is why you set the load factor to 50 percent. This causes the default workload hours to change from 5 to 2.5 and the assignment full-time equivalency percent to change from 33.33 percent to 16.67 percent. Notice that instructor B, who is sharing the load with instructor A to teach Math 200, somehow earns an assigned full-time equivalent (FTE) of 33.33 percent. In addition, the default workload hours read 5, rather than 2.5, as they do for instructor A. This is because you assigned a multiplier of 200 percent to instructor B for this term. All class components to which you assign instructor B count double for this term. Also, notice that instructor A is supervising an independent study course, Physics 499. This subject and component are set to be multiplied by only 50 percent. This is so that whoever teaches physics with a component of independent study earns half credit for the task. Because of this, even though the component workload hours of 3 are 10 percent of the 100 percent weekly workload hours for this assignment type, the subject component multiplier halves this value so that the instructor earns an assigned FTE of 5 percent. This process also causes the default workload hours to differ from those set on the Class Associations - Class Components page (halved from 3 to 1.5).

<i>Instructor</i>	<i>Assign- ment</i>	<i>Class Assoc Component Page Wrkl'd Hrs</i>	<i>Subject/ Comp. Multiplier</i>	<i>Assign Type/ 100% Wkly Wrkl'd Hrs</i>	<i>Load Factor</i>	<i>Meetings Page Default Wrkl'd Hrs</i>	<i>Assign FTE</i>
Instructor A Term Multiplier = 100%	Math 200	5	Math Lecture/ 100%	RegLec/ 15	50%	2.5	16.67%

<i>Instructor</i>	<i>Assign- ment</i>	<i>Class Assoc Component Page Wrkld Hrs</i>	<i>Subject/ Comp. Multiplier</i>	<i>Assign Type/ 100% Wkly Wrkld Hrs</i>	<i>Load Factor</i>	<i>Meetings Page Default Wrkld Hrs</i>	<i>Assign FTE</i>
	Physics 201	5	Phys Lecture/ 100%	RegLec/15	100%	5	33.33%
	Physics 499	3	Phys Ind Study/50 %	IndStudy/30	100%	1.5	5%
							Total Term FTE% = 55%
Instructor B Term Multiplier = 200%	Math 200	5	Math Lecture/ 100%	RegLec/15	50%	5	33.33%
						Total Term FTE% = 33.33%	Total Term FTE% = 33.33%

Instructor Assignment Percentage Formulas

The Instructor Workload feature uses three formulas to calculate an individual's assignment full-time equivalency percentage. The system uses one of two formulas to calculate assignment FTE for regular classes and for open entry and open exit (OEE) classes. It uses another formula to calculate assignment FTE for assignments made directly to the Term Workload page.

Note. The Use Term/Session Weeks in Calc check box on the Academic Institution 4 page enables you to exclude the assigned number of weeks—in the session—and the total weeks in a term from the workload calculation formulas.

Regular Assignment FTE Formula

The system uses the following formula to calculate an individual's assignment full-time equivalency percentage for a regular scheduled class (non-OEE):

$(\text{assignment workload hours} \times \text{assigned number of weeks} \times 100) / (100 \text{ percent weekly workload hours} \times \text{total weeks in term}).$

assignment workload hours	The number of workload hours that are assigned to the instructor.
assigned number of weeks	The total number of weeks in the session for which the instructor is teaching. This number is derived from the session table.
100 percent weekly workload hours	The standard number of weekly hours that are required (for example, 15 hours). This number is derived from the assignment type table.
total weeks in term	Derived from the term/session table.

Open Entry and Open Exit Assignment FTE Formula

The system uses the following formula to calculate an individual's assignment full-time equivalency percentage for an OEE class:

$(\text{assignment workload hours} \times \text{assigned number of weeks} \times 100) / (100 \text{ percent OEE workload hours} \times \text{total weeks in term})$

assignment workload hours	The number of workload hours that are assigned to the instructor.
assigned number of weeks	The total number of weeks in the session for which the instructor is teaching. This number is derived from the session table.
100 percent OEE workload hours	The standard number of term hours that are required (for example, 225 hours). This number is derived from the assignment type table.

The formula that the Instructor Workload feature uses to calculate an individual's assignment full-time equivalency percentage from an assignment that is made directly to the Term Workload page is:

$(\text{assignment workload hours} \times 100) / (100 \text{ percent weekly workload hours})$

assignment workload hours	The number of workload hours that is assigned to the instructor.
100 percent weekly workload hours	The standard that is required (for example, 15 hours). This number is derived from the assignment type table.

Examples of FTE Percent Formulas

The following example shows instructor C's assignments. The Biology 100 lecture is quite straightforward. Three workload hours, compared to a 100 percent weekly workload hours value of 15, result in the Biology 100 course totaling 20 percent of the instructor's workload (3 hours is 20 percent of 15 hours). The Biology 100 lab, however, is associated with an assignment type of *NotIncl/0* (do not include). This results in zero workload hours, therefore contributing no assignment FTE percentage.

In addition, instructor C teaches Biology 105 over the internet, with an assignment type of *Internet*. Notice that this assignment type has a 100 percent weekly workload hours value of 6, which means that 6 hours taught on the internet is 100 percent of an individual's workload. This course assignment creates an assignment FTE of 50 percent (3 hours is 50 percent of 6).

Finally, instructor C advises the Pre-Med Club. This assignment has a workload hours value of 9, which translates into 30 percent of the instructor's assignments (9 is 30 percent of 30).

Instructor D is a good example of how an individual can earn a total term FTE of 100 percent, while assigned only to advising (no class instruction). All types of assignments can contribute to total term FTE percentage.

Instructor E shows how OEE classes can effect FTE. This instructor teaches Psych (psychology) 210, with a workload hours value of 60. Because this section of Psych 210 is an OEE class, multiply the workload hours by the total weeks in the session, and then multiply by 100 ($60 \times 15 \times 100 = 90000$). Divide the result by the 100 percent OEE workload hours (225), times the total weeks in the session (15), and you get an FTE of 26.67 percent for this class.

<i>Instructor</i>	<i>Assignment</i>	<i>Component</i>	<i>Class Compnt Wrkld Hours/ [OEE Wkld Hrs]</i>	<i>Assign Type/ 100% Wkly Wkld Hrs or [100% OEE Wkld Hrs]</i>	<i>Asnmnt FTE%</i>
Instructor C	Biology 100	Lecture	3	RegLec/15	20%
	Biology 100	Laboratory	1	NotIncl/0	0
	Biology 105	Lecture (Internet)	3	Internet/6	50%
	Advise Pre-Med Club	N/A	9	Student Club Advisor/ 30	30%
					Total Term FTE% = 100%
Instructor D	Advise Math Club	N/A	15	Student Club Advisor/ 30	50%
	Advise Math Honor Society	N/A	15	Student Club Advisor/ 30	50%
					Total Term FTE% = 100%
Instructor E	Psych 210	OEE Lecture	[60]	[RegLec/225 (15 weeks)]	26.67%
	Psych 378	OEE Lecture	[90]	[RegLec/225 (15 weeks)]	40%

<i>Instructor</i>	<i>Assignment</i>	<i>Component</i>	<i>Class Compnt Wrkld Hours/ [OEE Wkld Hrs]</i>	<i>Assign Type/ 100% Wkly Wkld Hrs or [100% OEE Wkld Hrs]</i>	<i>Asnmnt FTE%</i>
	Psych 378	Lecture	3	RegLec/15	26.67%
	Advise Psych Club	N/A	1	Student Club Advisor/9	11.11%
					Total Term FTE% = 104.45%

Prerequisite

Before you can track instructor workload, Student Records setup tables must be fully operational so that the faculty workload pages can retrieve complete and accurate data.

See Also

[Chapter 1, "Getting Started with Student Records," page 1](#)

Implementing Instructor Workload Setup Tables

To set up instructor workload, use the Assignment Type component (ASSIGNMENT_TYPE) and the Instructor Assignment Class component (INSTRUCTOR_CLASS).

Here is a high-level overview of how to set up instructor workload:

1. Create assignment types.
2. Create instructor assignment classes.
3. Activate the Instructor Workload feature by selecting the Calculate Workload check box and updating required fields.
4. Update Academic Subject table with component multiplier percentage.
5. Update the Course Catalog - Components page with workload hours, as necessary.
6. Adjust workload hours on the Class Components page, as necessary.

7. (Optional) Update the Term Workload page with instructor assignment class value and other data.

This task is optional because assignments that are made on the Meetings page automatically create a Term Workload record for the individual if none exists for the term that you are assigning. However, this process uses default values to specify a full-time equivalency percentage for the individual.

8. Schedule a new course, assign an instructor, and enter workload hours, if needed.
9. Update workload hours after you schedule a course or manually create a noncourse assignment on the Term Workload page.
10. Return to the Term Workload page so that you can view the instructor's updated workload.

Pages Used to Implement Instructor Workload Setup Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assignment Type	ASSIGNMENT_TYPE	Curriculum Management, Instructor/Advisor Information, Assignment Type, Assignment Type	Establish new assignment type values that can be associated with course components or other noncourse-based instructor assignments.
Instructor Assignment Class	INSTRUCTOR_CLASS	Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Instructor Assignment Class	Establish new instructor assignment class values and defaults that the system can reference on both the Term Workload page and the Academic Institution 4 page. Enter an alphanumeric code (one to six characters in length) for the instructor assignment class. Each instructor assignment class value is associated with only one academic institution.
Academic Institution 4	INSTITUTION_TABLE4	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4	Activate the Instructor Workload feature to establish high-level limits, workload preferences, and default values for instructor workload at your institution. Before you access the Academic Institution page, create an assignment type and an instructor assignment class.

Page Name	Definition Name	Navigation	Usage
Subject Workload	SUBJ_WORKLD_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload	Specify the weight of each component in each subject.
Components	CRSE_CATALOG_CMPNT	Curriculum Management, Course Catalog, Course Catalog, Components	Enter workload hour data that serve as a default value that the system uses to populate the same components on the Class Components page when you schedule a class.
Class Components	CLASS_ASSOC_CMPNT	Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Components	Use the Workload Hours field to enter or update workload hours data for each scheduled class component of a course.

Creating Assignment Types

Access the Assignment Type page (Curriculum Management, Instructor/Advisor Information, Assignment Type, Assignment Type).

Assignment Type

Find | View All First 1 of 1 Last

Assignment Type: REG

Academic Institution: PSUNV

PeopleSoft University

*Effective Date: 01/01/1900

*Status: Active

*Description: Regular

Short Description: Regular

☒ View on Schedule of Classes
 ☒ Include Assignment in Workload

100% Weekly Workload Hours: 15.00

100% OEE Workload Hours: 225.00

Assignment Type page

The assignment type affects how the system calculates the assignment full-time equivalency percentage when you assign an instructor to a course component (on the Meetings page) or to any other type of manual assignment (on the Term Workload page).

Note. To use the Instructor Workload feature, an Assignment Type with `ASSIGN_TYPE = 'NON'` must exist (hard-coded) for each academic institution in your database. This value is automatically created when you activate the feature on the Academic Institution 4 page. You cannot delete or inactivate these values for any academic institution for which you have activated the Instructor Workload feature.

Assignment types might include *standard lecture class*, *standard lecture Internet*, *standard lab*, *overload*, *unpaid*, *academic counseling*, *thesis supervision*, and so on. For example, a course that is taught on the internet might weigh differently than a course that is taught in a classroom. You can create different assignment types to represent this variation. In addition, some assignment types (such as academic counseling) might not be applicable for association with a course. In these instances, you can specify assignment type options that disable this value as a choice on the Meetings page.

Effective Date

Enter an effective date for the assignment type value that you establish on this page.

Note. You can use only those assignment types with effective dates that are earlier than or equal to the effective date of the Academic Institution table as academic institution defaults on the Academic Institution 4 page.

Assignment types with effective dates later than the effective date of the Academic Institution table can still be used throughout the system; they cannot be set up as academic institution default values.

Status

Select a status for the assignment type value. Select *Active* when adding a new assignment type. Select *Inactive* only if your institution no longer uses the listed values. In particular, you cannot inactivate assignment type values (set on the Academic Institution 4 page) that the system references. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Short Description

Enter the short description to associate with the assignment type value. This description appears in the grid on the Meetings page and on the Term Workload page. Be sure to use a short value that clearly describes the assignment type value. For example, you might want to describe an assignment type of Standard 15-Hour Assignment with a short description of *Std15*. In that case, the grid prompt value also appears as *Std15*. The short description is to the first ten characters of the description.

View on Schedule of Classes

Select if you want the assignment type to be an available drop-down choice on the Meetings page. This check box does not control whether the assignment type appears on the Schedule of Classes report; it just determines whether the assignment type can be associated with a course component. Leave this check box cleared if you do not want the assignment type available for pairing with components. For example, an assignment type of *academic counseling* or *student club advisor* might not be something that you want associated with a course component. It is an assignment type that is created specifically for use on the Term Workload page. In this case, do not select this check box. However, an assignment type of *In-person lecture* might be something that you want available on the Meetings page. In this case, do select this check box.

Include Assignment in Workload

Select if you want components with this assignment type to be included in the instructor's total term full-time equivalency percentage.

100% Weekly Workload Hours

Enter the 100 percent weekly workload hours value that specifies the normal weekly workload for this assignment type. This field enables you to assign different weekly full-time hours for different assignment types. For example, the standard class lecture full-time hours might be 15 per week, the standard internet lecture full-time hours might be 20 per week, and academic counseling full-time hours might be 35 per week.

100% OEE Workload Hours

If this assignment type can be affiliated with classes that are offered in an open entry and exit format, enter a 100 percent OEE workload hours value that represents the full-time load for an entire term. For example, if you have a 100 percent weekly workload hours value of 15 for this assignment type, you can multiply this value by the number of weeks in the term to which this assignment type belongs (100 percent weekly workload hours [15] × number of weeks in a term [15] = 100 percent OEE workload hours [225]).

Creating Instructor Assignment Classes

Access the Instructor Assignment Class page (Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Instructor Assignment Class).

Instructor Assignment Class

Find | View All First 1 of 1 Last

Instructor Assignment Class: FULL

Academic Institution: PSUNV PeopleSoft University

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

***Description:** Full-time

***Full/Part Time:** Full-Time

☒ **Calculate Workload:**

☒ **Limit Workload:**

***Assigned FTE %:** 120.00

***Instructor Multiplier %:** 100

Instructor Assignment Class page

Instructor assignment class values cluster different types of individuals with similar workload requirements. For individuals in a particular instructor assignment class, the default settings that you establish here can be modified on the Term Workload page.

Effective Date	Enter an effective date for the instructor assignment class that you establish on this page. Note. Only those active instructor assignment classes with effective dates less than or equal to the effective date of the Academic Institution table can be used as academic institution defaults on the Academic Institution 4 page. Instructor assignment classes with effective dates greater than the effective date of the Academic Institution table can still be used throughout the system, but they cannot be set up as academic institution default values.
Status	Select a status for the instructor assignment class. Select <i>Active</i> when adding a new instructor assignment class. Select <i>Inactive</i> only if your institution no longer uses the value listed. In particular, you cannot inactivate an instructor assignment class that the system references on the Academic Institution 4 page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Description	Enter the description to associate with the instructor assignment class value. All alphanumeric characters are valid. This description appears in a related display on the Term Workload and Academic Institution 4 pages.
Full/Part Time	Select a full-time or part-time value to indicate the traditional status of instructors who are assigned to this instructor assignment class. The default is <i>Full-Time</i>. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Calculate Workload	Select to apply the Instructor Workload feature to instructors in this assignment class by default. This selection determines whether the system creates term detail records at all. This selection alone does <i>not</i> control whether the Instructor Workload feature produces a limit warning. You must select the Limit Workload check box in conjunction with this check box for warnings to appear. If you want to set up an instructor assignment class specifically for those instructors who never have load calculations performed, set up a separate instructor assignment class and do not select this check box. The value selected here is used to populate the Calculate Workload check box on the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.
Limit Workload	Select to apply the limits to instructors in this instructor assignment class by default. This feature controls whether the system produces error messages or warnings when assignments cause an individual's total term FTE percent to exceed either the individual's assigned FTE percent or the academic institution warning limits, whichever comes first. If you select the Calculate Workload check box, this check box is available. The value selected here is used to populate the Limit Workload check box on the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.

Assigned FTE % (assigned full-time equivalent percent)

Enter the assigned FTE percentage to indicate the traditional assignment of instructors assigned to this instructor assignment class. This value represents the percentage of the institution-wide standard to assign to instructors in this class. For example, a field value of *100.00* enables you to make assignments for instructors in this instructor assignment class up to a total term FTE percent of 100. If you want to hold instructors in this instructor assignment class to only 80 percent of the institution-wide standard, then you might set the value to *80.00*. Finally, if you often overbook full-time instructors in a particular instructor assignment class (perhaps to ultimately drop them from an assignment at the beginning of the term), then you might want to set this value to *120.00*. This field's default value corresponds to the full-time and part-time value that you select. The value entered here is used to populate the Term Workload page as a default value for individuals in this instructor assignment class.

You can change this setting on an individual and term-by-term basis on the Term Workload page.

Instructor Multiplier %

Enter the instructor multiplier percent to associate with this instructor assignment class. This value contributes to the default workload hours formula for courses that are assigned on the Meetings page for individuals in this instructor assignment class. For example, if you want to give a certain group of instructors double credit for the course components to which they are assigned, set this value to *200*. However, if you want instructors to get only half credit for their course assignments, you might assign them to a different instructor assignment class with this field set to *50*. This multiplier does not apply to noncourse-based assignments that are made directly to the Term Workload page. By default, this field displays *100* when you are in Add mode. The value that is entered here is used to populate the Term Workload page as a default value. You can change this setting on an individual and term-by-term basis on the Term Workload page.

Defining Instructor Workload Preferences for Your Institution

Access the Academic Institution 4 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4).

Academic Institution 3		Academic Institution 4		Academic Institution 5		Academic Institution 6	
Academic Institution:		PSUNV		PeopleSoft University			
				Find View All		First 1 of 1 Last	
Effective Date:	01/01/1900			Status:	Active		
☒ Calculate Workload							
		Workload Hours					
Full-Time Warning Limit %:	100.00			Course Component Workload Hrs%:	100		
Part-Time Warning Limit %:	50.00			Academic Progress Units %:			
☒ Use Term/Session Weeks in Calc							
Default Values							
Full-Time Assigned FTE %:	120.00			Assignment Type:	LEC Lecture		
					Assignment Type		
Part-Time Assigned FTE %:	60.00			Instructor Assignment Class:	FULL Full-time		

Academic Institution 4 page

Calculate Workload

Select to activate the workload feature for your institution and to display related fields. Before you select this check box, you may want to insert a new effective-dated row on the Academic Institution 1 page.

Full-Time Warning Limit %

Enter the full-time warning limit percent for the Instructor Workload feature to reference at all times across the institution. This value indicates the institution-wide setting for those individuals who are assigned to an instructor class that is *full-time*. If an assignment is made that causes a full-time individual's total term FTE percentage to exceed this value, the system issues a soft warning. The system produces the soft warning only if the individual's Limit Workload check box is selected on the Term Workload page.

Part-Time Warning Limit %

Enter the part-time warning limit percent for the Instructor Workload feature to reference at all times across the academic institution. This value indicates the institution-wide setting for those individuals who are assigned to an instructor class that is *part-time*. If an assignment is made which causes a part-time individual's total term FTE percentage to exceed this value, a soft warning is issued. The system issues the warning only if the individual's Limit Workload check box is selected on the Term Workload page.

Use Term/Session Weeks in Calc (use term/session weeks in calculation)

Select this check box to include the assigned number of weeks—in the session—and the total weeks in the term within the workload assignment FTE calculation. Clear this check box to exclude the assigned number of weeks—in the session—and the total weeks in the term within the workload assignment FTE calculation.

Choosing How to Sum Workload Hours

Course Component Workload Hrs% (course component workload hours percent)

Enter a percentage to specify your institution standard for compiling course workload. For example, you might want to calculate workload hours based solely on the defined workload hours that are associated with the course component. In this instance, set the Course Component Workload Hrs% field to *100* and the Academic Progress Units % field to *0* (or leave the second field cleared). When these two fields are set this way, any time that you assign an instructor to teach a course component at the specified academic institution, the course component workload hours calculation uses only the course component workload hours value (and not the progress units) for the course. In addition, if you want to sum workload hours based on both fields, you can do this by setting each of the fields to the appropriate percentages. In this instance, ensure that the two values total 100.

Academic Progress Units %

Enter a percentage to specify your institution standard for compiling course workload. For example, you might want to calculate workload hours at your institution based solely on the academic progress units that are associated with the course component. In this instance, set the Course Component Workload Hrs% field to 0 (or leave this second field cleared) and the Academic Progress Units % field to 100. When these two fields are set this way, any time that you assign an instructor to teach a course component at the specified academic institution, the course component workload hours calculation uses only the academic progress units for the overall course as set on the Class Associations page (and not the course component workload hours). This causes any component of the course (lecture, laboratory, and so on) to be calculated based on the academic progress units for the overall course as set on the Class Associations page. In addition, if you want to sum workload hours based on both fields, you can do this by setting each of the fields to the appropriate percentages. In this instance, ensure that the two values total 100.

Note. The preceding field values apply only to assignments that are made on the Meetings page. Although not required by the system, these two fields should total 100.

Note. Workload hours for assignments (which are not course-based) that are made directly to the Term Workload page do not reference either the Course Component Workload Hrs% or Academic Progress Units % fields. Instead, the user enters the assignment workload hours manually. For example, an assignment that is made directly to the Term Workload page for *advising the math club* might have a manually assigned workload entry of 3 to represent the number of hours per week that this assignment requires.

Assigning Workload Hours to Courses and Class Components

Workload for courses can comprise academic progress units and course component workload hours. If your Academic Institution 4 page setting specifies that some percentage (1-100) of workload comprises course component workload hours, specify course workload hours in the course catalog. In addition, you might want to specify or update these hours for each component on the Class Associations - Class Components page.

Specifying Default Values for Your Institution

Full-Time Assigned FTE %
(full-time assigned full-time equivalent percent)

Enter the full-time assigned FTE percent to appear in the Assigned FTE % field on the Instructor Assignment Class page when a value of *Full-Time* is selected for the Full/Part Time field on that page. This is only a default value, and you can change it on the Instructor Assignment Class page.

Part-Time Assigned FTE %
(part-time assigned full-time equivalent percent)

Enter the part-time assigned FTE percent to appear in the Assigned FTE % field on the Instructor Assignment Class page when a value of *Part-Time* is selected for the Full/Part Time field on that page. This is only a default value, and you can change it on the Instructor Assignment Class page.

Assignment Type	Enter the assignment type to appear on the Meetings page each time that the system assigns a course component. This setting is only a default value, and you can change it on the Meetings page.
Instructor Assignment Class	Enter the instructor assignment class to appear on the Term Workload page. This setting is only a default value, and you can change it on a case-by-case basis on the Term Workload page.

Note. You cannot inactivate or delete the assignment type and instructor assignment class that are referenced on the Academic Institution 4 page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Institutions

Defining Subject and Component Multipliers

Access the Subject Workload page (Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload).

Academic Institution: PSUNV PeopleSoft University	
Subject Area: PHYSICS Physics	
Effective Date: 01/01/1900	Status: Active
*Course Component: Lecture	*Component Multiplier %: 100
*Course Component: Ind Study	*Component Multiplier %: 50
*Course Component: Laboratory	*Component Multiplier %: 75

Subject Workload page

The system uses these values as part of the course component workload hours formula to calculate the assignment FTE percentage on the Meetings page. You do not need to enter values for course components that are multiplied by 100 percent.

Course Component

Select a course component to associate with courses in the academic institution and subject area that you specify. Values for this field are delivered with your system as translate values. You can modify these values. The course component value indicates the parts of the course offering, for example, *Lecture*, *Laboratory*, *Ind Study* (independent study), and so on.

One subject area can have multiple components.

See [Chapter 6, "Setting Up the Course Catalog," Defining Course Components, page 108.](#)

Component Multiplier %

Enter a component multiplier percentage value that represents the weight of this type of component. By default, this field displays *100*. The system uses this value as part of the course component workload hours formula to calculate default workload hours on the Meetings page. You do not need to enter values for course components that are multiplied by 100 percent unless you prefer to store this data for documentation.

As noted in the workload hours formula, multiplier values are 100 percent by default if they are not found.

See [Chapter 8, "Setting Up Instructor Workload," Course Component Workload Hours Formula, page 195.](#)

Linking Workload Hours to Courses

You can use the Workload Hours field and the OEE Workload Hours (open entry and exit workload hours) field on the Course Catalog - Components page to enter workload hour data. The value that you specify in each of these fields serves as a default value that the system uses to populate the same components on the Class Components page when you schedule a class. In other words, if you set the lecture Workload Hours field to 3 on the Course Catalog - Component page, then whenever you schedule a lecture for this course, the lecture component Workload Hours field has a default value of 3 workload hours on the Class Components page for this component. Similarly, if you set the lecture OEE Workload Hours (open entry and exit workload hours) field to 45 on the Course Catalog - Component page, then whenever you schedule a lecture for this course in an open entry and open exit session, the lecture component OEE Workload Hours (open entry and exit workload hours) field has a default value of 45 workload hours on the Class Components page. If necessary, you should modify the component values on the Class Components page.

See Also

[Chapter 6, "Setting Up the Course Catalog," Defining Course Components, page 108](#)

Linking Workload Hours to Class Components

Use the Workload Hours field on the Class Associations - Class Components page to enter or update workload hours data for each scheduled class component of a course.

See Also

Chapter 24, "Managing the Schedule of Classes," Modifying Class Components, page 586

Chapter 9

Setting Up Transfer Credit Processing

This chapter provides an overview of the transfer credit business process and discusses how to:

- Define external organizations.
- Set up external subjects.
- Set up external school subjects.
- Enter external courses.
- Set up external terms.
- Set up test and component information.
- Set transcript and statistics defaults.
- Make overall statistics adjustments.
- Define study agreements.
- Create course transfer equivalency rules.
- Review examples of course equivalencies.
- Convert existing transfer components into component subject areas.
- Copy transfer components between component subject areas.
- Define course equivalencies for academic programs and plans.
- Create test transfer equivalency rules.
- Define test equivalencies for academic programs and plans.

Important! Much of this organizational setup is shared with PeopleSoft Campus Community and PeopleSoft Recruiting and Admissions. Therefore, you should coordinate your efforts.

Understanding the Transfer Credit Business Process

This section lists prerequisites and discusses the transfer credit business process.

Prerequisites

Before you set up transfer credit rules and process transfer credit, complete all other setup for Student Records. You must define academic careers, academic programs, academic plans, the course catalog, grading bases, terms, and sessions. It is helpful to write out the rules for accepting transfer credit before you enter the rules in the system.

Transfer Credit Business Process

While the setup for the Transfer Credit feature is complicated, after you set it up, you can save a lot of time in the future.

Setting up for processing transfer credit involves defining the external organizations from which you accept transfer credit and defining all of the subject areas and courses that the external organization can transfer. A key aid to completing the setup for the Transfer Credit feature is to point any external organization or internal institution to any other external organization's or internal institution's catalog of courses. It is thus possible to create one group of external courses that a number of external organizations share. Sharing course information saves time because you do not have to duplicate your data entry effort if one or more organizations have the same or similar courses. It is especially helpful when dealing with a large transfer population from schools where courses are virtually the same or catalogs are shared. For instance, if your academic institution receives many transfer students from a state college system, you can create one catalog of external courses for the state college system where all state colleges in that system can point to for these courses.

Transfer equivalency rules that you create are the foundation of the Transfer Credit process. After you define external organizations, you create equivalency rules for courses and tests, then attach these equivalency rules to specific academic programs and academic plans. You also attach an equivalency rule to an external organization or internal institution.

After you complete the setup, you are ready to process transfer credit. Transfer credit processing is based on a concept of modeling various scenarios of transfer credit articulation. You set up model scenarios for an individual, dependent on the individual's chosen academic program and plan to demonstrate different options of transferring credit. Based on your setup, you have the ability to model as many transfer credit scenarios as you want for prospects, applicants, and current students. You also have the flexibility to articulate models based on predefined rules or rules that you create manually.

Defining External Organizations

Before you can use transfer credit processing, use the Organization Table (ORGANIZATIONS) component to define external organizations. As you define external organizations, specify their locations, contacts, departments, and characteristics. Also, specify whether the organization is a vendor.

As part of the external organization setup within this component, transfer credit processing requires that you:

- Select the Offers Courses check box on the School Data page in the Organization School Data (SCC_EXT_ORG_ADM) component to identify the external organization as one that offers courses.

You can also access this page via a link on the Organization Table page. This page enables you to create external courses to be used in transfer credit articulation rules.

- Enter the data that applies to the external organizations that offer courses on the School Data page.

When forming transfer credit rules, the system uses the values that you define for the external organization in the Career, Term Type, and Unit Type fields and the Catalog Information group box as system default values. Furthermore, if you indicate that an external organization has a shared catalog with another external organization, the system uses the catalog organization that you specify as the default value on the Course Transfer Rule page.

Defining external organizations functionality is shared with Campus Community and Recruiting and Admissions.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database"

Setting Up External Subjects

You define subject categories for external organizations on the External Subject Table page. Then, you link these subjects to external organizations and the courses they offer. The subject area that you enter on the External Subject Table page can be tied to specific external organizations on the School Subject Maintenance page. For every external organization from which you anticipate receiving academic work for transfer articulation, define all subject areas on this page.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Organization Data," Entering Codes for External Organizations

Setting Up External School Subjects

To set up external school subjects, use the School Subject Maintenance (SCHOOL_SUBJECTS) component. This section discusses how to link external subjects to external organizations.

Page Used to Set Up External School Subjects

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
School Subject Maintenance	SCHOOL_SUBJECTS	Set Up SACR, Common Definitions, External Education, School Subject Maintenance, School Subject Maintenance	Link external subjects to specific external organizations, specifying the subject areas that your institution accepts as transfer credit from the external organization. You use these subject areas to build external courses.

Linking External Subjects to External Organizations

Access the School Subject Maintenance page (Set Up SACR, Common Definitions, External Education, School Subject Maintenance, School Subject Maintenance).

Important! The catalog of courses for one external organization can be used by multiple institutions. Plan carefully before you use this page to enter every subject area for every institution from which you might receive transfer credit.

School Subject	Enter a school subject for the external organization. This field contains no edits and, thus, enables you to enter any value. Only the values in the prompt box display a description.
External Subject Area	Enter the external subject area that corresponds to the school subject. This field is useful when an external organization has a number of school subjects that are the same but have different names, such as <i>ENGL</i> and <i>English</i> . You can associate both school subjects with each other, for example, by tying each school subject to the external subject area of <i>ENGL</i> .

Entering External Courses

To set up external courses, use the School Course Classification (SCHOOL_COURSES) component.

This section discusses how to record external courses.

Page Used to Enter External Courses

Page Name	Definition Name	Navigation	Usage
School Course Classification	SCHOOL_COURSES	Set Up SACR, Common Definitions, External Education, School Course Classification, School Course Classification	Record the specific course offerings for each subject area of an external organization. You use these course classifications when you create course transfer rules.

Recording External Courses

Access the School Course Classification page (Set Up SACR, Common Definitions, External Education, School Course Classification, School Course Classification).

School Course Classification




Org ID: 000010133 Cornell College

School Subject: ENGL

School Course Number Find | View All First 1 of 1 Last

***School Course Number:** 210 + -

School Course Details Find First 1 of 1 Last

***Effective Date:** 01/01/1990  ***Status:** Active + -

***Description:** English Literature to 1800

Short Description: Lit 1800

***External Subject Area:** ENGL  English

***Career:** Undergrad

External Course Type: Course **Course Level:** Regular

External Units: 3.00

School Course Classification page

Note. If you want to inactivate an external course, you must enter a status of inactive *and* remove the external course from your course equivalency rules.

School Course Number

Enter the course number at the specified external organization for the course that you are classifying. This value is usually the catalog number of the external course.

External Subject Area	Enter the external subject area for this course at the specified external organization. This field is where school subjects that are the same but have different names can both be represented by the single external subject area that you enter.
Career	Enter the career for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.
External Course Type	Enter the external course type for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.
Course Level	Enter the level for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.
External Units	Enter the number of external units that this course is worth at the specified external organization.

Note. External courses are converted to the unit type of your academic institution based on the rules on the External Term Table page.

Setting Up External Terms

Define external terms on the External Term page. When tracking information about external institutions for a prospect, applicant, or student, you may want to know the specific term to which that information is related. For example, if you are entering external transfer credit information, you want to record the term to which the transfer credit information pertains. Because external institutions use various term structures, use this page to define all external terms. You can also set up how you want external terms converted to your term structure on this page.

Note. The system uses the conversion multipliers on the Unit Conversion Table page when calculating internal transfer credit (for instance, transferring between academic careers).

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Organization Data," Entering Codes for External Organizations

Setting Up Test and Component Information

To create test credit transfer rules, define your test components and test codes:

- Use the Test Component page to set up test components used in your rules for test credit equivalencies.
Example test components include English Composition and Essay, German Language and Listening, and so forth.
- Use the Test Tables page to set up test codes and to link test components to them.

Note. Minimum scores are also defined for test transfer equivalency rules.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Processing External Test Scores"

Setting Transcript and Statistics Defaults

Use the Organization Affiliation page to enter details about the affiliation of your institution with specific external organizations. The only relevant fields for transfer credit processing that contain the default values for printed transcripts are in the Transfer Credit Transcript Print group box on this page. You can override the default values for specific transcript types on the Transfer/Test/Other Credits page of the Transcript Type (TSCRPT_TYPE) component.

Level of Detail

Enter a value to indicate the transfer credit level of detail to print on transcripts for a student transferring credit from this external organization:

Summary: Enter this value to print a student's total transferred units and grade point average (GPA) from this external organization on the student's transcript. Enter this value if you use the Historical Course Enrollment page for your conversion process.

Detail: Enter this value to print what you selected in the Details to Print field.

Details to Print

If you enter *Detail* in the Level of Detail field, use this field to enter the details to print on the transcript: *None*, *External Courses*, *External and Internal*, or *Internal Equivalent Courses*.

Include Transfer Credit in GPA

Select this check box if you want the transfer credit from this organization to be included in the student's GPA. If you clear this check box, the system does not include transfer credit grade points in the student's GPA.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database," Entering Affiliations with Organizations

Making Overall Statistics Adjustments

Use the Terms in Residence page to modify a student's terms in residence or to adjust transfer credit values.

See Also

Chapter 30, "Maintaining Student Career Term Records," Maintaining a Student's Terms in Residence, page 709

Defining Study Agreements

To set up study agreements, use the Student Agreement Table (STUDY_AGREEMNT_TBL) component.

You can attach study agreements to individual student records on the External Study page of the Term Activation (STDNT_ACTIVATION) component. Study agreement codes are normally used to represent study abroad, exchange, and visiting programs.

This section lists the page used to define study agreements.

Page Used to Define Study Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Study Agreement Table	STUDY_AGREEMNT_TBL	Set Up SACR, Common Definitions, Study Agreement Table, Study Agreement Table	Create study agreements for use with external organizations.

Creating Course Transfer Equivalency Rules

To set up course transfer equivalency rules, use the Transfer Subject Area (TRNSFR_SUBJ_AREA) component and the Course Transfer Rules (TRNSFR_RULE) component.

This section provides an overview of course transfer equivalency rules and discusses how to:

- Define component subject areas.
- Define subject area elements.
- Review and adjust incoming course information.
- Define course transfer rules.

Understanding Course Transfer Equivalency Rules

After you set up all of the tables discussed previously in this chapter, you can begin to create your course transfer equivalency rules. The Transfer Credit process enables you to articulate course credit manually or with predefined course transfer equivalency rules. Most likely, you will create predefined rules for external organizations or internal academic institutions from which you receive the majority of your transfer students. You can create manual rules for those organizations from which you infrequently receive transfer students.

In this section, we review how to create the predefined course equivalency transfer rules for modeling transfer articulations for a prospect, applicant, or student. An equivalency rule is attached to an external organization or internal academic institution and can contain numerous transfer components. You might even decide to define more than one course transfer equivalency rule for an external organization or internal academic institution to account for academic program and academic plan differences in articulation rules.

The term *component* is used throughout this chapter and should be distinguished from the same term used in PeopleSoft PeopleTools, where it refers to a page or a group of pages under a menu item. In the Transfer Credit feature, a component ties each incoming course and its internal equivalents together. Thus, for each incoming course and its matched equivalent, a corresponding component exists. Together, these data elements represent a line or sequence within the overall course transfer rule. Thus, a course transfer rule is generally made up of hundreds, possibly thousands, of components, each of which contains a number of data elements, including the transfer priority number, the incoming courses, and the internal equivalents. For simplicity, we refer to components related to transfer credit as *transfer components*.

To manage this large volume of transfer components, group them into distinct component subject areas for each external organization or internal academic institution by using the Transfer Subject Area component. Because component subject areas are user-defined and not enforced by the Subject table of your academic institution, you can define a component subject area with a value that you can later associate with a given course transfer equivalency rule. For example, you can create a component subject area called Mathematics for an external organization and define all of the incoming math and statistics courses and their internal equivalent courses within this component subject area. Alternatively, you can define one component subject area for math courses and one component subject area for statistics courses.

After you define component subject areas, use the Course Transfer Rules component to assign component subject areas to the course transfer rules that you create for each external organization or internal academic institution.

The system stores the data for each component subject area in intermediary tables (TRANSFR_RULE and TRANSFR_RSUB) that are independent of the course-transfer equivalency rule tables (TRANSFR_SUBJ, TRANSFR_COMP, TRANSFR_FROM, TRANSFR_TO). All of these tables are associated with each other through parent-and-child relationships in the table structure.

Articulating Variable Unit Courses

To ease the articulation of variable unit courses, the PeopleSoft system can determine transfer unit values in one of three ways:

1. By the units of the internal equivalent course as they appear in the course catalog.
2. By a fixed value, determined by the institution.
3. By the units of the incoming course, whether a set or variable value, with the option of setting a maximum limit.

Rather than having the transfer model determine the transfer units for an incoming course based on the units of the internal equivalent course in the course catalog as they appeared at the time that you set up the transfer rule, which can cause the system to get out of synchronization, you can determine the units by the internal equivalent course or by a fixed value. See the examples at the end of this section for more information.

Excess Credit Courses

You can award excess credit to a specified course. For example, if a student took MATH 1A for four units, but the internal equivalent was only worth three units, then you can set up an excess credit course and award the excess units to that course. See the examples at the end of this section for more information.

Note. The PeopleSoft Academic Advisement application treats the excess credit course as another transfer course, bringing in the course ID, grade, and requirement designation as it does for the internal equivalent course. Like the internal equivalent, the excess credit course is also coded as "TR" on the degree audit. If your business practice is to use one particular course ID to collect excess credit for a variety of incoming courses, be aware that each instance of the course will appear on the advising report.

Transfer Status: Rejected

The system automatically rejects courses for any of these reasons:

- The Transfer Course check box is cleared on the Subject Area Elements page for the applicable rule.
- The enrollment date of the incoming course is not entered or the system is unable to calculate it.

When no date is entered, the system automatically calculates a date like this:

- If no term year is entered, the system uses the year 1900 as the year that the class was taken.
- If no external term is entered, the system uses January 1 as the month and day that the class was taken.
- If an external term is entered without a term year, the system finds the appropriate month from the external term table (for instance, fall may be month 8) and calculates the rest.

In this instance, the date that the class was taken would be August 1, 1900.

- The official grade is blank.

See Also

[Chapter 39, "Processing Transfer Credit," page 921](#)

Pages Used to Create Course Transfer Equivalency Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transfer Subject Area	TRNSFR_SUBJECT	Records and Enrollment, Transfer Credit Rules, Transfer Subject Area, Transfer Subject Area	Describe component subject areas for a transfer credit source, otherwise known as an external organization or internal academic institution. Also set up incoming course default information for the transfer components that you will define within this component subject area. The system applies these defaults to each incoming course that you specify on the Subject Area Elements page of this component.
Subject Area Elements	TRNSFR_DETAIL	Records and Enrollment, Transfer Credit Rules, Transfer Subject Area, Subject Area Elements	Define the transfer components of the component subject area.
Incoming Course Information	TRNSFR_FR_SEC	Click the Incoming Course Information link on the Subject Area Elements page.	Adjust the default information for a particular incoming course within the component subject area. Default information for incoming courses of a particular component subject area is defined on the Transfer Subject Area page.
Course Transfer Rules	TRNSFR_RULE	Records and Enrollment, Transfer Credit Rules, Course Transfer Rules, Course Transfer Rules	Define course transfer equivalency rules for external organizations or internal academic institutions.

Defining Component Subject Areas

Access the Transfer Subject Area page (Records and Enrollment, Transfer Credit Rules, Transfer Subject Area, Transfer Subject Area).

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010143	Fresno City College	
Component Subject Area:	FCC-ENGLISH		
Find View All First 1 of 1 Last			
Effective Date:	01/01/1980	Status:	Active
Description:	English Courses		
Catalog Org Type:	External		
Catalog Organization:	000010143	Fresno City College	
Component Defaults			
Min / Max Units:	1.00	99.00	Term Type: Quarter
Min / Max Grade Pts per Unit:	1.000	4.500	
Internal Equiv Course Value:	Specify Fixed Units		
Excess Credit Defaults			
Course ID:			
Requirement Designation:			

Transfer Subject Area page

General Fields

Catalog Org Type (catalog organization type)

Designates the table from which you select a catalog organization for the component subject area of the specified source.

External: The system prompts you with external organizations in your system. Define external organizations on the Organization Table page.

Internal: The system prompts you with academic institutions in your system. Define academic institutions on the Academic Institution Table page.

Catalog Organization

Enter the catalog organization for this component subject area of the specified source. By default, the system displays the specified source as the catalog organization, but you can override this value. The system prompts you with values based on the value that you entered in the Catalog Org Type field. When defining course equivalencies for the component subject area of the specified source on the Subject Area Elements page, the system prompts you with incoming courses based on the catalog organization value that you enter here.

You can use any external organization or internal academic institution as the catalog organization to define course equivalencies for this component subject area of the specified source. However, after you define a course equivalency on the Subject Area Elements page, the Catalog Org Type and Catalog Organization fields become unavailable.

Component Defaults

Use the fields in the Component Defaults group box to define default information for incoming courses that you select for this component subject area of specified source on the Subject Area Elements page. Later, you can override these default values for an individual incoming course by clicking the Incoming Course Information link for the incoming course to change on the Subject Area Elements page.

Min/Max Units (minimum and maximum units)	Enter the default minimum and maximum units for all incoming courses that you define for this component subject area of the specified source.
Term Type	Enter the default term type for all incoming courses that you define for this component subject area of the specified source. By default, the system displays the term type defined on the School Data page in the Organization School Data component. Values for this field are delivered with your system as translate values. You can modify these values.
Min/Max Grade Pts Per Unit (minimum and maximum grade points per unit)	Enter the default minimum and maximum grade points per unit for all incoming courses that you define for this component subject area of the specified source.
Internal Equiv Course Value (internal equivalent course value)	Enter a default value for this component subject area. Select from these options: <i>Use Catalog Units:</i> The system determines the number of units that the student will obtain for the incoming course based on the unit setting for the internal equivalent course in the course catalog. <i>Specify Maximum Units:</i> The system uses the units of the incoming course but does not exceed the maximum units that you enter in the Max Units to Transfer field. <i>Specify Fixed Units:</i> The system awards the student the number of units that you enter in the Units field.

Excess Credit Defaults

Course ID	If you want to create excess credit courses, enter a default for this component subject area. The system places excess units into this course when a student has taken more units for the incoming course than is allowed in the internal equivalent course. See the Course ID field description in the following section: Defining Subject Area Elements.
Requirement Designation	If you want to assign a requirement designation to your excess credit courses, enter a default for this component subject area. Requirement designations further define the type of transfer credit being received. Requirement designation values are defined on the Requirement Designation Table page.

See Also

Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 39

Defining Subject Area Elements

Access the Subject Area Elements page (Records and Enrollment, Transfer Credit Rules, Transfer Subject Area, Subject Area Elements).

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010143	Fresno City College	
Component Subject Area:	FCC-ENGLISH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1980	Status:	Active
Description:	English Courses		
Subject Area Elements Find View All First 1 of 4 Last			
*Sequence Number:	0001		
*Description:	Reading and Composition		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	1	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☒	Save Excess Units to a Course:	☐

Subject Area Elements page (1 of 2)

Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	003271 ENGLCOMP10
WildCard:	☐	*Offer Number:	1 Reading Comp I
*Subject:	ENGL English	Units:	3.00
Course Number:	10 Reading and Composition	*Default Grade:	By Incoming Course
Incoming Course Information		*Course:	Seq 1: ENGL 10
*Seq#:	2	*Course ID:	003273 ENGLCOMP12
WildCard:	☐	*Offer Number:	1 Reading Comp II
*Subject:	ENGL English	Units:	3.00
Course Number:	11 Freshman Composition	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			

Subject Area Elements page (2 of 2)

Within each transfer component, you define the incoming courses and internal equivalent courses. For each transfer component, you define the term type of the incoming course, the transfer priority in relation to other transfer components within the component subject area, and some general information.

General Fields

Sequence Number	The sequence number is the numeric counter that distinguishes each transfer component of the component subject area from other transfer components. By default, the system populates the first sequence number of the component subject area with <i>0001</i> and increases the number by one as you add transfer components.
Description	This field describes the transfer component of the component subject area. By default, the system displays the description from the Transfer Subject Area page. You can override this default value.
Term Type	Enter the term type for this transfer component of the component subject area. By default, the system displays the term type from the Transfer Subject Area page. Values for this field are delivered with your system as translate values. You can modify these values.
Transfer Course	Select to have the incoming courses on this transfer component of the component subject area transfer to your academic institution, provided that the student's incoming course meets all conditions of the course transfer rule. Clear to have the Transfer Credit process reject the incoming courses that you enter on this row of the component subject area. A course evaluated in this way has a status of <i>rejected</i> on the Transfer Course Details page of the Course Credits component.
Transfer Priority	Enter the transfer priority number for this transfer component. The Transfer Credit process evaluates the courses within the component subject area according to the transfer priority of each transfer component. The transfer component that has the highest priority takes precedence. If an individual's incoming course meets all conditions of the course transfer rule to which this component subject area is assigned, the Transfer Credit process uses the equivalent course as defined on the transfer component that has the highest transfer priority. If the individual's incoming course does not meet the conditions of the course transfer rule to which this component subject area is assigned, the Transfer Credit process evaluates the incoming course against the transfer component with the next highest transfer priority. For example, if you have a rule where a student can receive credit based on the grade or the number of units that the student completes, you set up two separate components using a different transfer priority for each. If a student takes math 101 for two units or gets an A, the internal equivalent is Math 102; and if a student takes math 101 for three units or gets a C, the internal equivalent is Math 99.

Contingent Credit

Select to have the incoming courses transfer to your academic institution as contingent credit, provided that the individual's incoming course meets all conditions of the course transfer rule to which this component subject area is assigned. A course evaluated in this way has a status of *contingent* on the Transfer Course Details page of the Course Credits (TRNS_CRSE) component. You can manually change the status of the incoming course from *contingent* to *accepted* after the individual meets the contingency.

For example, Education 310 at UC Santa Cruz is equivalent to Education 312 at PSUNV, provided that the student also has submitted verification of an internship. Select the Contingent Credit check box for this incoming course. During the Transfer Credit process, the course credit transfers but the incoming course has a status of *contingent* on the Transfer Course Details page.

Internal Equiv Course Value (internal equivalent course value)

Enter a value to indicate how you want the system to determine the number of units the student will receive from the incoming course. Select from the following:

- *Use Catalog Unit:* The system determines the number of units the student will get for the incoming course based on the unit setting for the internal equivalent course in the course catalog.

To determine the units in the course catalog, the system compares the start date of the articulation term to the effective date in the course catalog.

- *Specify Maximum Units:* With two internal equivalents, the system adds the values of the incoming courses to determine the total amount that is available to transfer, up to the maximum specified, and uses the rest for the excess course when the Save Excess Units to a Course check box is selected.

Note. Entering this value precludes the user from having two internal equivalents without selecting the Save Excess Units to a Course check box. To use a many-to-many or one-to-many rule, select *Specify Fixed Units* or *Use Catalog Units*.

- *Specify Fixed Units:* The system uses the number of units that you enter in the Units field, which appears in the Internal Equivalent group box when you select this option.

By default, the system populates the Units field with the course catalog unit value of the internal equivalent when the transfer rule is set up. You can change this value.

Note. If the unit value or effective date in the course catalog changes, the Units field on this page does not change.

Save Excess Units to a Course

Select if you want to save excess units from the incoming course to a specified internal course. For example, if the incoming course was taken for four units, and the internal equivalent course is worth only three units, the extra unit can be credited to a second internal course, most likely an elective course.

Note. Only one excess unit course can be assigned per transfer equivalency rule. Also, you cannot save excess units to a course when there is more than one internal equivalent.

Incoming Course

Use the Incoming Course group box to define the external course information for a specific transfer component. The incoming courses and internal equivalent courses that you define are the transfer components of the component subject area.

Seq# (sequence number)

The system automatically assigns a sequential number to each incoming course to identify unique transfer component records within the data table. These sequence numbers have no programming significance.

W (wildcard)

Select to use the # wildcard character at the end of the *Course Number* field value for the incoming course. If you clear this check box, the system requires you to use a complete course number.

Subject

Enter the subject area of the incoming course. For incoming courses from external organizations, define subject values on the School Subject Maintenance page. For incoming courses from internal academic institutions, subject areas are tied to courses in that academic institution's course catalog.

Course Number

Enter the course number for the incoming course. If you are using an external organization for the catalog organization (as defined on the Transfer Subject Area page), the system prompts you with courses that you associated with the external organization on the School Course Classification page. If you are using an internal academic institution for the catalog organization, the system prompts you with courses defined for that academic institution in the Course Catalog (CRSE_CATALOG) component.

If you selected the W check box, you can substitute the # wildcard character for the last character of the course number so that you can map a series of incoming courses to one internal equivalent course. For example, you can enter 1# to map course numbers 10 through 19 to a specific internal equivalent course, you can enter 10# to map course numbers 100 through 109 to specific internal equivalent course, or you can enter 1## to map all 100 level courses to a specific internal equivalent course. Otherwise, the system prompts you with values from the School Course Classification Table page.

Incoming Course Information Click to access the Incoming Course Information page, where you can enter detail information about this incoming course.

Internal Equivalent

Use the Internal Equivalent group box to define the internal course that is equivalent to the incoming course for this transfer component.

Course ID	Enter the course that is equivalent to the incoming course for this transfer component.
Offer Number	Defaults to the offer number of the course that you entered, as defined in your academic institution's course catalog. You can override this value.
Max Units to Transfer (maximum units to transfer)	This field appears when you enter <i>Specify Maximum Units</i> in the Internal Equiv Course Value field. Enter the maximum number of units that a student can transfer for this incoming course. For example, if the incoming course is a variable unit course that can be taken for one to five units, and you want the system to use the incoming units to populate the internal equivalent units, but you want to accept only up to three units for this course, you could enter 3 in this field. However, if you want the system to use the units of the incoming course, but do not want to impose a maximum, accept the default of 99.
Units	This field appears when you enter <i>Specify Fixed Units</i> in the Internal Equiv Course Value field. Enter the number of units that you want the internal equivalent to be worth, regardless of the number of units the incoming course is worth. For example, if you enter 3 in this field, a student can take the course for one unit, two units, or seven units, but still receives three units for the internal equivalent. Defaults to the value are defined in the course catalog. You can change this value. This value does not change when you change the units in the course catalog.

Default Grade

Enter a value in this field to indicate how you want the Transfer Credit process to determine the grades for internal equivalent courses.

The *By Grade Order* value is available only for many-to-one and many-to-many equivalency rules. When you enter this value, the Grade Order field becomes available. The value that you enter in this field determines which incoming grade the Transfer Credit process uses. For example, if the rule is that two incoming courses—ENG101 with a grade of A and ENG102 with a grade of B—can be transferred as the internal equivalent ENGL1301, and you enter a grade order of *2nd Highest*, the Transfer Credit process transfers the B grade to the internal equivalent course.

Note. The Transfer Credit process copies the grade from the incoming course to the equivalent course if the grade is a valid value for the grading scheme and the grading basis of the student's academic program.

Enter the value of *Incoming Course* in the Default Grade field if you want the Transfer Credit process to copy the grade from the incoming course to the internal equivalent course. When you enter this value, the Course field becomes available. For many-to-one and many-to-many equivalency rules, enter a value in the Course field to indicate which course you want the transfer credit process to use. In a many-to-many rule, each internal equivalent can use a different incoming course to determine the grade.

Note. The Transfer Credit process copies the grade from the incoming course to the equivalent course if the grade is a valid value for the grading scheme and the grading basis of the student's academic program.

Enter the value of *By Transfer Equivalency Setup* in the Default Grade field if you want the Transfer Credit process to use the transfer grade value defined on the Academic Program Table (ACADEMIC_PROG_TBL) component for the academic program specified on the transfer credit model.

Excess Credit Group Box

This group box appears when you select the Save Excess Units to a Course check box.

Course ID

Enter an excess credit course for this transfer equivalency rule. If a student earns more units for an incoming course than the internal equivalency rule allows, the system awards the student units in the course that you enter here. The course should be an elective course for which repeat checking is not activated.

Note. Each time that a student is awarded excess units in a course, the articulation of units appears as a separate instance of the class. Therefore, you should select the Repeat for Credit check box on the Catalog Data page in the course catalog for the course that you enter. Also, you should set the Units Allowed for the course to 999 and the Total Completions Allowed to 99 on the Catalog Data page.

Offer Nbr (offer number)	By default, the system displays the offering number of the course that you entered according to the definition of that course in your academic institution's course catalog. You can override this value.
Max Units to Transfer (maximum units to transfer)	Enter the maximum number of excess units that you want to award students. If you do not want to set a maximum, accept the default value of 99.
Requirement Designation	Enter a requirement designation if you want to define the type of transfer credit being received. This value appears by default from the course catalog.

See Also

- [Chapter 6, "Setting Up the Course Catalog," Defining Course Catalog Data, page 90](#)
- [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations, page 39](#)

Reviewing and Adjusting Incoming Course Information

Access the Incoming Course Information page (click the Incoming Course Information link on the Subject Area Elements page).

Incoming Course Information

School Subject:	MATH	Mathematics
School Course Nbr:	15	Trigonometry
Course Level:	Regular	
External Units:	3.00	
Begin / End Date:	01/01/1900	12/31/9999
Min / Max Units:	1.00	99.00 *Maximum Age: 99
Min / Max Grade Pts per Unit:	1.000	4.500

Incoming Course Information page

Begin / End Date	By default, the system populates the begin and end date of the incoming course with 01/01/1900 and 12/31/9999. You can override these default values. These dates inform the Transfer Credit process when this incoming course is valid for the course transfer equivalency rule to which you attach this component subject area.

Min / Max Units (minimum and maximum units)

The system displays the default minimum and maximum units for incoming courses within this component subject area. You can override these default values.

For example, you might want to specify the same incoming course twice but differentiate each specification by how many units are earned. In this case, specify the same incoming course multiple times but with different minimum and maximum unit ranges.

Min/Max Grade Pts Per Unit (minimum and maximum grade points per unit)

The system displays the default minimum and maximum grade points per unit for incoming courses within this component subject area. You can override these default values.

Maximum Age

This field defines the maximum age in years of the incoming course. This prevents an individual from transferring credit for this course to your academic institution when the individual took the course more years ago than the number that you specify here. By default, the system sets the maximum age of an incoming course to 99 years, but you can override this default value. For instance, you might want restrict individuals from receiving transfer credit for a course when an individual has taken the course more than 4 years previous to the date your institution processes that individual's transfer credit.

Defining Course Transfer Rules

Access the Course Transfer Rules page (Records and Enrollment, Transfer Credit Rules, Course Transfer Rules, Course Transfer Rules).

Course Transfer Rules

Find | View All First 1 of 1 Last

Academic Institution: PSUNV PeopleSoft University

Source ID: 000010147

Equivalency Rule: SMCC

***Effective Date:** 01/01/1990 ***Status:** Active

***Description:** Santa Monica College - LAU/FAU

Transfer Subject Area		
+ -	SMCC-ARTS	Art Courses
+ -	SMCC-ENGLISH	English Courses
+ -	SMCC-HISTORY	History Courses
+ -	SMCC-LANGUAGES	Foreign Languages
+ -	SMCC-MATH	Math Courses

Course Transfer Rules page

For each transfer equivalency rule, attach component subject areas that you have defined for the source in the Transfer Subject Area (TRNSFR_SUBJ_AREA) component. You can define multiple course transfer equivalency rules for a single source. For example, you might define multiple rules to account for academic program and academic plan differences in equivalency rules. The effective date functionality enables you to add and delete component subject areas that are no longer valid for the equivalency rule.

When adding a new transfer equivalency rule, you must also specify the credit source type of either *external organization* or internal academic *institution*. The credit source type instructs the system from which table you will select your source ID. By selecting *external organization*, the system prompts you with the source IDs of external organizations in your system. By selecting *institution*, the system prompts you with source IDs of academic institutions in your system.

Transfer Subject Area	Enter the component subject areas to tie to the course transfer equivalency rule. Each component subject area defines the incoming courses, their internal equivalent courses, and detail about how the Transfer Credit process must function. The Transfer Credit process uses the transfer component data for component subject areas to determine an individual's transfer credit.

Reviewing Examples of Course Equivalencies

This section provides examples of the following course equivalencies:

- Many-to-one.
- Many-to-many.
- Course rejection.
- Multiple equivalencies for the same course.
- Excess credit.

These examples demonstrate some of the ways that you can set up the Subject Area Elements page for course equivalencies.

Example of a Many-to-One Course Equivalency

This example shows a many-to-one course equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1982	Status:	Active
Description:	Math Courses		
Subject Area Elements Find View All First 11 of 11 Last			
*Sequence Number:	0011		
*Description:	Math 16 and 20		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	1	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☐	Save Excess Units to a Course:	☐
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	001004 MATH 107
Wildcard:	☐	*Offer Number:	1 Precalculus
*Subject:	MATH Math	Units:	2.00
Course Number:	16 Pre-Calculus	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			
*Seq#:	2		
Wildcard:	☐		
*Subject:	MATH Math		
Course Number:	20 Calculus 1		
Incoming Course Information			

Example of many-to-one course equivalency

When the Transfer Credit process applies this rule, it uses the transfer grade value defined on the Academic Program Table component for the academic program specified on the transfer credit model.

Example of a Many-to-Many Course Equivalency

This example shows a many-to-many course equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1982	Status:	Active
Description:	Math Courses		
Subject Area Elements Find View All First 11 of 11 Last			
*Sequence Number:	0011		
*Description:	Math Courses		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	1	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☐	Save Excess Units to a Course:	☐
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	001003 MATH 10
Wildcard:	☐	*Offer Number:	1 Remedial Algebra
*Subject:	MATH Math	Units:	3.00
Course Number:	14 Intermediate Algebra	*Default Grade:	By Incoming Course
Incoming Course Information		*Course:	Seq 1: MATH 14
*Seq#:	2	*Course ID:	001001 MATH 101
Wildcard:	☐	*Offer Number:	1 College Algebra
*Subject:	MATH Math	Units:	3.00
Course Number:	15 Algebra & Trigonometry	*Default Grade:	By Incoming Course
Incoming Course Information		*Course:	Seq 2: MATH 15

Example of many-to-many course equivalency

When the Transfer Credit process applies this rule, it uses the transfer grade for MATH 14 for one course and the transfer grade for MATH 15 for the other course.

Example of a Course Rejection Equivalency

To reject a course, clear the Transfer Course check box. The Internal Equivalent group box fields become unavailable. This example shows a course rejection equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1982	Status:	Active
Description:	Math Courses		
Subject Area Elements Find View All First 13 of 13 Last			
*Sequence Number:	0013		
*Description:	Math 8 - Reject		
*Term Type:	Quarter		
Transfer Course:	☐		
*Transfer Priority:	1	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☐	Save Excess Units to a Course:	☐
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	
Wildcard:	☐	*Offer Number:	
*Subject:	MATH Math	Units:	0.00
Course Number:	08 Preparatory Math	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			

Example of a course rejection equivalency

Example of Multiple Equivalencies for the Same Course

The following examples show multiple equivalencies for the same course.

For Santa Monica City College, the student's transfer course articulates to different math courses at PSUNV, depending on the number of units that a student takes for Math 20. In this example, there are two component rules—one for Math 20 taken between one and two units and another for Math 20 taken between three and four units.

This is an example of the one to two unit equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1982	Status:	Active
Description:	Math Courses		
Subject Area Elements Find View All First 12 of 12 Last			
*Sequence Number:	0012		
*Description:	Math 20 - 1 to 2 units		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	1	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☐	Save Excess Units to a Course:	☐
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	001004 MATH 107
Wildcard:	☐	*Offer Number:	1 Precalculus
*Subject:	MATH Math	Units:	2.00
Course Number:	20 Calculus 1	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			

Example of multiple equivalencies for the same course (1 of 4)

The incoming course maps to *Pre-calculus*.

This example shows the Incoming Course Information page for the one-to-two unit equivalency:

Incoming Course Information			
School Subject:	MATH	Math	
School Course Nbr:	20	Calculus 1	
Course Level:	Regular		
External Units:	3.00		
Begin / End Date:	01/01/1900	12/31/9999	
Min / Max Units:	1.00	2.00	*Maximum Age: 99
Min / Max Grade Pts per Unit:	1.000	4.500	

Example of multiple equivalencies for the same course (2 of 4)

The minimum and maximum units are 1.00 and 2.00, respectively.

This example shows the three-to-four unit equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1982	Status:	Active
Description:	Math Courses		
Subject Area Elements Find View All First 13 of 13 Last			
*Sequence Number:	0013		
*Description:	Math 20 - 3 to 4 units		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	2	*Internal Equiv Course Value:	Specify Fixed Units
Contingent Credit:	☐	Save Excess Units to a Course:	☐
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	001005 MATH 111
Wildcard:	☐	*Offer Number:	1 Calculus I
*Subject:	MATH Math	Units:	3.00
Course Number:	20 Calculus 1	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			

Example of multiple equivalencies for the same course (3 of 4)

The incoming course maps to a *Calculus 1* instead of *Pre-calculus*.

This example shows the Incoming Course Information page for the three-to-four unit equivalency:

Incoming Course Information			
School Subject:	MATH	Math	
School Course Nbr:	20	Calculus 1	
Course Level:	Regular		
External Units:	3.00		
Begin / End Date:	01/01/1900	12/31/9999	
Min / Max Units:	3.00	4.00	*Maximum Age: 99
Min / Max Grade Pts per Unit:	1.000	4.500	

Example of multiple equivalencies for the same course (4 of 4)

The minimum and maximum units are 3.00 and 4.00, respectively.

Example of an Excess Credit Course Equivalency

Excess credit occurs when the external course is worth more units than the internal equivalent course. Identify an existing course or create a new course to manage excess credit. This example shows an excess credit course equivalency:

Transfer Subject Area		Subject Area Elements	
Academic Institution:	PSUNV	PeopleSoft University	
Source ID:	000010147	Santa Monica City College	
Component Subject Area:	SMCC-MATH	Review History	
Effective Date: 01/01/1982		Status: Active	
Description: Math Courses			
Subject Area Elements		Find View All First 1 of 1 Last	
*Sequence Number:	0011		
*Description:	Math 16		
*Term Type:	Quarter		
Transfer Course:	☒		
*Transfer Priority:	1		
Contingent Credit:	☐		
*Internal Equiv Course Value:		Specify Fixed Units	
Save Excess Units to a Course:		☒	
Incoming Course		Internal Equivalent	
*Seq#:	1	*Course ID:	001004 MATH 107
Wildcard:	☐	*Offer Number:	1 Precalculus
*Subject:	MATH Math	Units:	2.00
Course Number:	16 Pre-Calculus	*Default Grade:	By Transfer Equivalency Setup
Incoming Course Information			
		Excess Credit	
		*Course ID:	666674 MATH 1X
		*Offer Number:	1 Math Excess
		Max Units to Transfer:	99.00
		Requirement Designation:	

Example of an excess credit course equivalency

Converting Existing Transfer Components into Component Subject Areas

If you are upgrading your Student Records system and you have existing transfer component data in your application tables, run the delivered upgrade script, UPG_SR. This upgrade script moves your existing transfer component data from the former application-data table structure into the current application-data table structure. It assigns all transfer components within an existing course transfer equivalency rule to a single component subject area that is named after the original rule in which the transfer component resides. After you run the upgrade script, use the Transfer Subject Area component to access each of the component subject areas that the upgrade script creates, just as you would any other component subject area that you manually define. The data for all component subject areas, regardless of how they were created, are stored in the same table (EXT_TRNSFR_SUBJECT).

Next, you must go to the Course Transfer Rules page and create your course transfer equivalency rules, attaching the component subject area to rules, as appropriate. The system writes course transfer equivalency rule data to the EXT_TRNSFR_RULE_SUBJ table. You can continue course transfer credit processing using predefined rules, as usual.

Copying Transfer Components Between Component Subject Areas

This section discusses how to copy transfer components between component subject areas.

Page Used to Copy Transfer Components Between Component Subject Areas

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Subject Area Copy Function	RUNCNTL_TRNSFR_CPY	Records and Enrollment, Transfer Credit Rules, Copy Subject Areas, Subject Area Copy Function	As necessary and as time permits, copy transfer components from larger, more general component subject areas into new, smaller component subject areas.

Copying Transfer Components Between Component Subject Areas

Access the Subject Area Copy Function page (Records and Enrollment, Transfer Credit Rules, Copy Subject Areas, Subject Area Copy Function).

Subject Area Copy Function

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run Refresh

Subject Area Information Find | View All First 1 of 1 Last

From Seq #: 1 **Description:** Long Beach City College + -
***Academic Institution:** PSUNV PeopleSoft University
***Source ID:** 000010146 Long Beach City College - LAU
***Component Subject Area:** LBCC Long Beach City College 1
***Effective Date:** 01/01/1970
Incoming Subject: BIOL
☐ Break by Incoming Subject
***From Component Seq#:** 0001 ***To Component Seq#:** 9999

TO Subject Area Info

***To Component Subject Area:** BIOL **Descr:** BIOL
***Effective Date To:** 31

Deselect All Filter Fetch Data

Find | View All First 1 of 2 Last

Sequence# / Description	Incoming Course	Equivalent Course												
☒ 0001 Long Beach City College 1	<table border="1"> <thead> <tr> <th>Subject</th> <th>Course Nbr</th> </tr> </thead> <tbody> <tr> <td>BIOL</td> <td>11</td> </tr> <tr> <td>Biology</td> <td>Biology I</td> </tr> </tbody> </table>	Subject	Course Nbr	BIOL	11	Biology	Biology I	<table border="1"> <thead> <tr> <th>Course ID</th> <th>Offer Nbr</th> </tr> </thead> <tbody> <tr> <td>003700</td> <td>1</td> </tr> <tr> <td>General Biology I</td> <td>BIOLOGY 100</td> </tr> </tbody> </table>	Course ID	Offer Nbr	003700	1	General Biology I	BIOLOGY 100
Subject	Course Nbr													
BIOL	11													
Biology	Biology I													
Course ID	Offer Nbr													
003700	1													
General Biology I	BIOLOGY 100													

Subject Area Copy Function page

The copying functionality is intended primarily for academic institutions that receive a large number of transfer credit courses from a single source. On this page, you select the component subject area from which you want to retrieve transfer components, define the basics of the new component subject area to create, then retrieve the transfer components from the existing component subject area based on your parameters. Sort through the list of results to select the transfer components to include in the new transfer subject area, then run the Transfer Rule Subject Area Copy COBOL/SQL process (SRPCCARX) to create the new, smaller component subject area and to copy the selected components into it. After you run the process, you can edit the newly created component subject area in the Transfer Subject Area component. Attach this new component subject area to course transfer equivalency rules in the Course Transfer Rules (TRNSFR_RULE) component and resume course transfer credit processing as usual.

Important! If you are copying a large component subject area, you should either use the Incoming Subject field or the Break by Incoming Subject check box to separate the large component subject area into smaller ones based on incoming subject. Alternatively, use the From Component Seq# and To Component Seq# fields to copy blocks of 500 transfer components at a time into smaller component subject areas based on transfer component sequence numbers. You are not required to copy transfer components by subject area—it is just a logical breaking point for large component subject areas.

Refresh	Click to refresh the page.
From Seq # (from sequence number)	The sequence number is the numeric counter that distinguishes each row of the process request apart from other rows. By default, the system sets the first sequence number to 1 and increases the number by one as you add rows.
Description	Enter a description for this row of the process request.
Academic Institution	Enter the academic institution to which the component subject area to copy belongs.
Source ID	Enter the identification code of the source to which the component subject area to copy belongs.
Component Subject Area	Enter the component subject area to copy. The system displays values based on the academic institution and source that you specified for this process request.
Effective Date	Enter the effective date of the specified component subject area. The effective date indicates the row to copy within the specified component subject area.
Incoming Subject	Enter an incoming subject to filter by subject through all transfer components of the specified transfer component subject area. When you click the Fetch button, the system retrieves only the transfer components with this incoming subject and automatically selects to copy them into the new, smaller component subject area during processing. This field prompts against the external subject table for the specified external organization. If you use this field, the Break by Incoming Subject check box becomes unavailable for entry. Note that you can assign the To Component Subject Area field and its related Description field the same name as the incoming subject because component subject areas are keyed by source ID. Alternatively, you can assign these fields unique values.
Break by Incoming Subject	Select to break by incoming subject all the transfer components of the specified component subject area. If you select this check box, the Incoming Subject field, To Component Subject Area field, and its related Description field become unavailable for entry. When you click the Fetch button, the system retrieves all transfer components, separates them by incoming subject into unique rows on the run control page, assigns each row a sequence number, and automatically selects to copy all transfer components into new, smaller component subject areas during processing. For example, LBCC has eight different incoming subjects in their component subject area, so the system creates eight rows for eight new component subject areas. In addition, the system automatically populates the Incoming Subject field, the To Incoming Subject Area field, and its related Description field for each row. The Incoming Subject field remains unavailable for edit, but you can edit the other two fields.

From Component Seq# (from component sequence number)	Indicate the first transfer component to retrieve from the specified component subject area. By default, the system sets the value of this field to 0001. You can override this default value.
To Component Seq# (to component sequence number)	Indicate the last transfer component to retrieve from the specified component subject area. When you click the Fetch button to retrieve transfer components, the system displays all transfer components within the specified range. By default, the system sets the value of this field to 9999. You can override this default value.
To Component Subject Area	Enter the identification code of the new component subject area to create based on the preexisting component subject area that you specified.
Description	Enter a description of the new component subject area.
Effective Date To	Enter the effective date of the new component subject area to create based on the preexisting component subject area that you specified to copy.
Fetch	Click to retrieve the transfer components from the preexisting component subject area that you specified to copy.
Sequence # (sequence number)	The system displays the sequence number of the transfer component from the preexisting component subject area that you specified to copy.
Description	The system displays the description of the transfer component from the preexisting component subject area that you specified to copy.
Incoming Course	The system displays the subject, course number, and description for the incoming course of the transfer component.
Equivalent Course	The system displays the course ID, offering number, and description for the internal equivalent course of the transfer component.
Select All or Deselect All	Click to select or clear all of the transfer components in the list at the bottom of the page. This functionality is useful when you are splitting a component subject area with a large amount of transfer components. For example, you have a math component subject area with 300 transfer components and you want to group 250 within a new, higher math component subject area and the remaining 50 within a new, lower math component subject area. To create the higher math component subject area, retrieve all of the transfer components from the math component subject area, click the Select All button, and then clear the check boxes for the 50 excluded components. When you create the lower math component subject area, select all of the 50 included transfer components.
Filter	Click to filter the list of transfer components that appear at the bottom of this page. The system displays only the transfer components that you have checked. The checked transfer components are the only ones that the Subject Area Copy Function process uses when creating the new component subject area.

Unfilter

The system displays this button whenever you have filtered the list of transfer components that appear at the bottom of the page. Click this button to reset the list back to its original number of transfer components.

Defining Course Equivalencies for Academic Programs and Plans

This section provides an overview of course equivalencies for academic programs and plans and discusses how to:

- Set up basic academic program and plan data.
- Set equivalency rules.

Understanding Course Equivalencies for Academic Programs and Plans

To set up course equivalencies for academic programs and plans, use the Program/Source Equivalency (EXT_EQUIV) component.

After you set up your course transfer equivalency rules, you must use the Program/Source Equivalency component to select the academic programs and plans within your academic institution to which you want to assign these rules.

If you have multiple equivalency rules for a given external organization or internal academic institution, you can attach these rules to various academic program and academic plan combinations. For instance, if you create two course transfer equivalency rules for an external organization, then you can link one rule to the Liberal Arts program and the other rule to the Liberal Arts program and English plan. The English equivalency rule includes English course-specific equivalencies that are different from the liberal arts equivalencies.

Note. The Basic page enables you to attach course transfer equivalency rules to a specific academic program or academic plan. The system requires that you attach the rule to an academic program, but attaching the rule to an academic plan is optional.

Example of How the System Uses Effective Dating

The Transfer Credit Setup tables use effective dating to determine the correct row of data to use when determining the correct rule to be used at articulation.

You are articulating a student in Term 0370 - Fall 1999. The begin date for Fall 1999 is September 1, 1999. The system determines the correct row of data to use using this procedure:

1. The system accesses the Program/Source Equivalency page and finds the row that is less than or equal to September 1, 1999.

The date of this row is January 1, 1900.

2. The system accesses the Course Transfer Rules and finds the row that is less than or equal to January 1, 1900.

The date for this row is January 1, 1990.

3. The system locates the rules for the row that is less than or equal to January 1, 1900, and uses that rule.

Pages Used to Define Course Equivalencies for Academic Programs and Plans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Program/Source Equivalency - Basic	EXT_TRNSFR	Records and Enrollment, Transfer Credit Rules, Program/Source Equivalency, Basic	Set up basic parameters, such as grading basis and transfer grade, for processing transfer credit within a specified academic program or plan.
Rules Specification	EXT_TRNSFR_EQUIV	Records and Enrollment, Transfer Credit Rules, Program/Source Equivalency, Rules Specification	Set the course equivalency rules for academic programs or academic plans. The system uses these rules to evaluate transfer credit from the specified institution. On this page, like the external course catalog, you have the flexibility to point to any organization's ID to use as the source ID for course equivalency rules.

Setting Up Basic Academic Program/Plan Data

Access the Program/Source Equivalency - Basic page (Records and Enrollment, Transfer Credit Rules, Program/Source Equivalency, Basic).

Basic		Rules Specification	
Institution:	PSUNV	PeopleSoft University	
Academic Program:	LAU	Liberal Arts Undergraduate	Santa Monica City College
Academic Plan:			
Source ID:	000010147	Santa Monica City College	
Find View All First ◀ 1 of 1 ▶ Last			
*Effective Date:	02/01/1990	*Status:	Active
*Description:	SMCC - LAU		
*Grading Scheme:	UGD	Undergraduate Grading Scheme	
*Grading Basis:	GRD	Graded	
*Transfer Grade:	T	Transfer	
Transfer HS Courses:	☐		

Program/Source Equivalency - Basic page

When accessing this page in Add mode, enter the credit source type from which you will select your source ID. By entering *external organization*, the system prompts you with the source IDs of external organizations in your system. You define external organizations on the Organization Table page. By entering *institution*, the system prompts you with source IDs of academic institutions in your system. You define institutions on the Academic Institution Table page.

Effective Date

In addition to the common definition of this element, the system uses the effective date in conjunction with the articulation term on the Transfer Course Detail page to determine the validity of equivalency rules.

Grading Scheme

By default, the system displays the grading scheme of the specified academic program. Define grading schemes for academic programs on the Academic Program page in the Academic Program Table component. Define grading schemes for academic careers on the Academic Career Table page. You can override this default value now, and you can override this value later for individual transfer courses that you process. This grading scheme defines all of the valid grading bases from which you can select a default transfer grade for this academic program/plan and source combination.

Grading Basis

By default, the system displays the grading basis default for transfer credit according to the specified academic program. Define grading-basis defaults for transfer-credit values on the Academic Program page in the Academic Program Table component for academic programs. Define grading-basis defaults for transfer-credit values on the Academic Career Table page for academic careers. You can override this default value now, and you can override this value later for individual transfer courses that you process. This grading basis defines all of the valid grades from which you can select a default transfer grade for this academic program, academic plan, and source combination.

Transfer Grade

By default, the system displays the default transfer grade of the specified academic program. Define default transfer grades for academic programs on the Academic Program page in the Academic Program Table component. Define default transfer grades for academic careers on the Academic Career Table page. You can override this default value now, and you can override this value later for individual transfer courses that you process. This transfer grade defines the grade that an individual receives for courses that articulate into the specified academic program or academic plan.

Transfer HS Courses (transfer high school courses)

To include any course taken during high school in an individual's transfer credit for this academic program, academic plan, and source combination, select this check box. Clear this check box to exclude courses taken during high school.

Setting Equivalency Rules

Access the Rules Specification page (Records and Enrollment, Transfer Credit Rules, Program/Source Equivalency, Rules Specification).

Basic		Rules Specification
Academic Institution:	PSUNV	PeopleSoft University
Academic Program:	LAU	Liberal Arts Undergraduate
Academic Plan:		
Source ID:	000010147	Santa Monica City College
Find View All First 1 of 1 Last		
Effective Date:	02/01/1990	
Rule Source Type	Rule Source ID	Course Equivalency Rule
*Default:	Ext Org 000010147 Santa Monica City College	SMCC Santa Monica College - LAU/FAU
Override:		
Agreement:		

Rules Specification page

You must specify the credit source type from which you will select your source ID. If you enter *external organization*, the system prompts you with the source IDs of external organizations in your system. If you enter *institution*, the system prompts you with source IDs of academic institutions that you defined in your system.

All of the following group boxes have Agreement, Override, and Default fields. Each identically named field functions as a row of data to define a course equivalency rule. Each of these fields is documented once, following the group box definitions. As the Transfer Credit process evaluates courses, it uses the rules in this order: agreement, override, default.

Rule Source Type

Use the fields in this group box to select the table from which you will select each of your course equivalency rules for this academic program/plan and source combination. Select from the following choices.

External Org (external organization)

The system prompts you with the external organization source IDs in your system. Because external organizations and internal academic institutions can share the same course catalog, you might want to point to a different source ID for the course catalog.

Institution

The system prompts you with institution source IDs in your system.

Rule Source ID

Use the fields in this group box to select the source ID for the course transfer equivalency rule for this academic program/plan and source combination. You can point to any sources rules.

Course Equivalency Rule

Use the fields in this group box to select the specific course transfer equivalency rules for this academic program, academic plan, and source combination.

Common Course Equivalency Rule Fields

Agreement

The Transfer Credit process uses the course equivalency rule that you specify on this row first. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you did not specify a rule for this row, or if the transfer course does not meet the criteria of the rule, the process then evaluates the course equivalency rule that you specify on the Override row.

Override

The Transfer Credit process uses the course equivalency rule that you specify on this row next. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you did not specify a rule for this row, or if the transfer course does not meet the criteria of the rule, the process then evaluates the course equivalency rule that you specify on the Default row.

Default

The Transfer Credit process uses the course equivalency rule that you specify on this row last. If the transfer course meets the criteria of the rule specified on this row, the process applies the rule to the transfer course and evaluates the course no further. If you did not specify a rule for this row, or if the transfer course does not meet the criteria of the rule, the process will not articulate the course. In this case, the transfer course appears on the Transfer Course Details page with a status of *no rule*.

Note. If you have only one rule for this source, you must enter it in Course Equivalency Rule field in the Default row. The Default row is the only row on the page that requires a course equivalency rule.

Creating Test Transfer Equivalency Rules

To set up test transfer equivalency rules, use the Test Transfer Rules component (TEST_RULES).

This section discusses how to define test transfer equivalency rules.

Page Used to Create Test Transfer Equivalency Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Credit Rule/Component	TEST_CREDIT_COMP	Records and Enrollment, Transfer Credit Rules, Test Transfer Rules, Test Credit Rule/Component	Define sets of test transfer equivalency rules.

Defining Test Transfer Equivalency Rules

Access the Test Credit Rule/Component page (Records and Enrollment, Transfer Credit Rules, Test Transfer Rules, Test Credit Rule/Component).

Test Credit Rule/Component			
Institution:	PSUNV PeopleSoft University		
Test Equivalency Rule:	SATI		
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active
*Description:	SAT Test Rules - LAU		
Find View All First 1 of 5 Last			
*Test ID:	SAT I	Scholastic Assessment Test I	
Test Component:	MATH	Math	
*Equiv Component:	0001		
*Description:	Math	Priority:	1
Min / Max Score:	200.00	800.00	Min Percentile:
Begin / End Date:	01/01/1900	12/31/9999	Maximum Age:
			99
Find View All First 1 of 5 Last			
*Course ID:	001310	Complex Variables for Apps	
*Course Offering Nbr:	1	MATH	125
Units Taken:	3.00		

Test Credit Rule/Component page

Setting up test transfer equivalency rules is similar to setting up course credit transfer equivalency rules. For each test equivalency rule that you define, describe the rule, select the test and test component for the rule, and specify course equivalencies for the test component.

Test ID Enter the identification number of the test for which you are defining this test equivalency rule.

Test Component Enter the component of the test for which you are defining this test equivalency rule.

Equiv. Component (equivalent component) The equivalency component number is the numeric counter that distinguishes each row of the test equivalency rule apart from other rows. By default, the system enters the first equivalency component of the test equivalency rule as 0001 and increases the number by one as you add rows.

Description (lower) This field describes the row of the equivalency test rule. By default, the system displays the description of the test component according to the description on the Test Component Table page. You can override this default value.

Transfer Priority	Enter the transfer priority number for this row of the test equivalency rule. The Transfer Credit process evaluates the rows within the test equivalency rule according to the transfer priority of each row. The test component within the row that has the highest value takes priority. If an individual's transfer test meets all conditions of the test equivalency rule, then the Transfer Credit process uses the equivalent course as defined on the row with the highest transfer priority. However, if the individual's transfer test does not meet the conditions of the test equivalency rule, then the Transfer Credit process evaluates the row with the next highest transfer priority.
Min/Max Score (minimum and maximum score)	Enter the minimum and maximum score of applicable transfer tests for this row of the test equivalency rule, or enter the minimum percentile.
Minimum Percentile	Enter the minimum percentile of the applicable transfer tests for this row of the test equivalency rule, or enter the minimum and maximum score.
Begin/End Date	By default, the system sets the begin and end date of the transfer test to 01/01/1900 and 12/31/9999. You can override these default values. These dates inform the Transfer Credit process when the applicable transfer test must be taken for this row of the test equivalency rule.
Maximum Age	This field defines, in years, the maximum age of the transfer tests for this row of the test equivalency rule. This prevents an individual from transferring test credit into your academic institution if the individual took the test more years ago than the number of years that you specify here. By default, the system sets the maximum age of a transfer test to 99, but you can override this default value. For instance, you might want restrict an individual from receiving transfer credit for a test if the individual took the test more than 4 years prior to the date that your institution processes the individual's transfer credit.
Course ID	Enter the course to which the given test component is equivalent. The system prompts you with courses from your academic institution's course catalog. You can add rows to create a one-to-many test equivalency rule. You are prompted from your course catalog. The system automatically populates the Course Offering Number and Units Taken fields with values from the course catalog definition. You can enter a different offering number and enter different units.
Course Offering Number	By default, the system displays the course offering number of the specified course according to the value in your academic institution's course catalog. You can override this default value.
Units Taken	By default, the system displays the units taken value of the specified course according to the value in your academic institution's course catalog. You can override this default value.

See Also

[Chapter 6, "Setting Up the Course Catalog," page 87](#)

Defining Test Equivalencies for Academic Programs and Plans

To set up test equivalencies for programs and plans, use the Program/Test Equivalency (TEST_EQUIV) component.

This section discusses how to set test equivalencies for academic programs and plans.

Page Used to Define Test Equivalencies for Academic Programs and Plans

Page Name	Definition Name	Navigation	Usage
Test Credit Equivalency	TEST_CREDIT_EQUIV	Records and Enrollment, Transfer Credit Rules, Program/Test Equivalency, Test Credit Equivalency	Set the test transfer equivalency rules that the Transfer Credit process uses to evaluate transfer test credit for specific academic programs and academic plans.

Setting Test Equivalencies for Academic Programs and Plans

Access the Test Credit Equivalency page (Records and Enrollment, Transfer Credit Rules, Program/Test Equivalency, Test Credit Equivalency).

Test Credit Equivalency

Institution:

PSUNV

PeopleSoft University

Academic Program:

LAU

Liberal Arts Undergraduate

Academic Plan:

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

SAT Test Results - LAU

*Grading Scheme:

UGD

Undergraduate Grading Scheme

*Grading Basis:

GRD

Graded

*Transfer Grade:

T

Transfer

Test Equivalency Rules

*Default:

SATI

SAT Test Rules - LAU

Override:

Test Credit Equivalency page

General Fields

Grading Scheme

By default, the system displays the grading scheme of the specified academic program. Define grading schemes for academic programs on the Academic Program page in the Academic Program Table component. Define grading schemes for academic careers on the Academic Career Table page. You can override this default value now, and you can override this value later for individual transfer tests that you process. This grading scheme defines all of the valid grading bases from which you can select a default transfer grade for this academic program or academic plan.

Grading Basis

By default, the system displays the grading basis default for transfer credit according to the specified academic program. Define grading-basis default for transfer-credit values for academic programs on the Academic Program page in the Academic Program Table component. Define grading-basis default for transfer-credit values for academic careers on the Academic Career Table page. You can override this default value now, and you can later override this value for individual transfer tests that you process. This grading basis defines all of the valid grades from which you can select a default transfer grade for this academic program or academic plan.

Transfer Grade

By default, the system displays the default transfer grade of the specified academic program. Define default transfer grades for academic programs on the Academic Program page in the Academic Program Table component. Define default transfer grades for academic careers on the Academic Career Table page. You can override this default value now, and you can override this value later for individual transfer tests that you process. This transfer grade defines the grade an individual receives for tests that articulate into the specified academic program or academic plan.

Test Equivalency Rule

Use the fields in this group box to select the specific test transfer equivalency rules for this academic program or academic plan. As the Transfer Credit process evaluates test credit, it applies the rules in this order: Override, Default.

Default

The Transfer Credit process uses the test equivalency rule that you specify on this row last. If the transfer test meets the criteria of the rule specified on this row, the process applies the rule to the transfer test and evaluates the test no further. If you did not specify a rule for this row, or if the transfer test does not meet the criteria of the rule, the process does not articulate the test. In this case, the transfer test appears on the on the Test Credit Details page with a status of *no rule*.

Note. If you have only one rule for this academic program or academic plan, you must enter it in the Default field. The Default field is the only required field on the page.

Override

The Transfer Credit process uses the test equivalency rule that you specify on this row first. If the transfer test meets the criteria of the rule specified on this row, the process applies the rule to the transfer test and evaluates the test no further. If you did not specify a rule for this row, or if the transfer test does not meet the criteria of the rule, the process then evaluates the test equivalency rule that you specify on the Default row.

For example, you might have a general test equivalency rule for the Undergraduate Liberal Arts program but have a different rule for the English plan within this academic program. You would create two test transfer equivalency rules, enter the Liberal Arts program equivalency rule in the Default field, and then enter the English plan equivalency rule in the Override field.

Chapter 10

Setting Up Attendance Tracking

This chapter lists prerequisites and discusses how to set up attendance tracking data.

See Also

[Chapter 40, "Tracking Attendance," page 973](#)

Prerequisites

Before you can generate class attendance rosters or record student attendance, you must:

1. Define attendance type translate values in PeopleSoft Application Designer.
2. Set a default attendance type for each academic institution in your system.
3. Define courses in the course catalog.
4. Define all possible instruction modes, attendance types, and attendance type data for each course component in the course catalog.
5. (Optional) Set the attendance tracking generation flag for each class in the schedule of classes.

Setting Up Attendance Tracking Data

This section discusses how to:

- Define attendance type translate values.
- Select a default class meeting attendance type.
- Define attendance tracking options for course components.
- Indicate attendance roster generation for a class.

Pages Used to Set Up Attendance Tracking

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Institution Table 3	INSTITUTION_TABLE3	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 3	Specify a default class meeting attendance type for each institution.
Course Catalog - Components	CRSE_CATALOG_CMPNT	Curriculum Management, Course Catalog, Course Catalog, Components	Set catalog-level defaults for both batch attendance roster generation and instruction mode.
Schedule of Classes - Basic Data	CLASS_ENTRY	- Curriculum Management, Schedule of Classes, Schedule New Class, Basic Data - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Basic Data	Modify the Generate Class Mtg Attendance (generate class meeting attendance) check box and instruction mode values that appear by default from the Course Catalog - Components page.

Defining Attendance Type Translate Values

PeopleSoft Application Designer delivers the following attendance type translate values: Conference, Instructor Consultation, Field Trip, Class Meeting, and Study Group. Use PeopleSoft Application Designer to modify or add to these values. The field name is CLASS_ATTEND_TYP. However, be careful to not delete a value that is in use.

Selecting a Default Class Meeting Attendance Type

Use the Academic Institution Table 3 page to specify a default class meeting attendance type for each institution. In background processing mode, the system generates only one roster per class (even if you specified multiple attendance types on the Components page), so the value that you specify applies to all classes. The system uses the default attendance type value that you specify to determine the correct attendance type row and related attendance type detail for each class. Each class should have at least one row on the Course Catalog - Components page, with the same attendance type as the default attendance type.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Setting Additional Institution Defaults and Options

Defining Attendance Tracking Options for Course Components

Use the Course Catalog - Components page to set catalog-level defaults for both batch attendance roster generation and instruction mode and to define all possible attendance types and attendance type detail data.

See Also

[Chapter 6, "Setting Up the Course Catalog," Defining Course Components, page 108](#)

Indicating Attendance Roster Generation for a Class

Use the Schedule of Classes - Basic Data page to modify the Generate Class Mtg Attendance (generate class meeting attendance) check box and instruction mode values that are supplied by default from the Course Catalog - Components page. You can set this option at the catalog level and the schedule of classes level. This check box enables you to select the exact course components and classes for which your institution generates attendance rosters.

See Also

[Chapter 24, "Managing the Schedule of Classes," Defining Basic Data for Class Sections, page 545](#)

Chapter 11

Preparing to Track Student Data

Using Student Records, you can set up, track, and view non-course related student data.

This chapter lists common elements and discusses how to:

- Set up academic standing.
- Set up honors and awards.
- Set up special grade point averages.
- Review committees and committee members.
- Set up milestones.
- Set up extracurricular activities.
- Manage student groups.
- Set up student attributes.

Common Elements Used in This Chapter

Transcript Level

Select the transcript level on which you want the given data to print. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Degr Prog* (degree progress), *Not Print*, *Official*, *Stdnt Life* (student life), and *Unofficial*.

See Also

[Chapter 14, "Setting Up Transcripts," Understanding Transcript Levels, page 311](#)

Setting Up Academic Standing

To set up academic standing, use the Academic Standing Table component (ACAD_STDNG_TBL) and the Academic Standing Rule component (ACAD_STDNG_RULE).

With academic standing action codes and rules, you can create sets of guidelines for every academic career within your institution. You can then use these codes and rules to assign academic standing to students, either by running the Acad Standing/Honors Awards process (SRPCEASD) through the Academic Standing/Honors and Awards page to evaluate students' academic standing, or by entering academic standing codes directly onto a student's term history record through the Academic Standing page.

This section discusses how to:

- Define academic standing action codes.
- Create academic standing rules.
- Link academic standing, honors, and award rules to academic programs.

See Also

Chapter 41, "Tracking Student Data," page 997

Pages Used to Set Up Academic Standing

Page Name	Definition Name	Navigation	Usage
Academic Standing Table	ACAD_STDNG_TBL	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Academic Standing Table, Academic Standing Table	Define academic standing action codes for every academic career within your institution.
Academic Standing Rule	ACAD_STDNG_RULE	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Academic Standing Rule, Academic Standing Rule	Create academic standing rules. Academic standing rules are keyed by academic career, so define a broad description for an academic standing rule (such as <i>Undergraduate Rules</i> or <i>Graduate Rules</i>). Within each rule, you create detail lines that correspond with academic standing action codes that you define.
Standing/Honors	ACAD_PROG_STDG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors	Link academic standing rules to academic programs.

Defining Academic Standing Action Codes

Access the Academic Standing Table page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Academic Standing Table, Academic Standing Table).

Academic Standing Table

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

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

***Academic Standing Action:** DIS1 

***Description:** Dismissal 1 **Short Description:** Dismissal

***Academic Standing Status:** Dismissed 

***Formal Description:** Dismissed

***Internal Description:** Dismissed

***Transcript Level:** Official 

Academic Standing Table page

Creating academic standing action codes is a precursor to defining academic standing rules. Therefore, to define academic standing action codes, you must think about how they can be used in the rule sets for the academic standing process.

For example, suppose that students at your institution receive two warnings before being placed on probation and the warnings are of different degrees. That is, if students receive a second warning it is more severe. In this case you would define two different academic standing action codes for warnings because you want to distinguish them. Later, you define rule details for these codes, and for all other academic standing action codes defined on this page.

Note. If you want to inactivate an academic standing action code that is attached to an academic standing rule, delete the code where it is attached to the rule on the Academic Standing Rule page and enter a status of *Inactive* on the Academic Standing Table page.

Academic Standing Action	Enter an academic standing action code.
Academic Standing Status	Select an academic standing status. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are <i>Dismissed</i>, <i>Good Standing</i>, <i>Probation</i>, and <i>Subject to Dismissal</i>. You can have many academic standing action codes that contain the same academic standing status. For example, <i>DIS1</i>, <i>DIS2</i>, and <i>DIS3</i> can all contain a status of <i>Dismissed</i>.
Formal Description	Enter a formal description. If you choose to have the academic standing action appear on a student's transcript, the system displays the formal description.
Internal Description	Enter a description to be used for internal purposes only.

Transcript Level

Select the transcript level on which you want the academic standing to print. Values for this field are delivered with your system as translate values. These translate values can be modified. The delivered values are *Deg Prog* (degree progress), *Not Print*, *Official*, *Stdnt Life* (student life), and *Unofficial*.

See Also

[Chapter 14, "Setting Up Transcripts," Understanding Transcript Levels, page 311](#)

Creating Academic Standing Rules

Access the Academic Standing Rule page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Academic Standing Rule, Academic Standing Rule).

Academic Standing Rule

Academic Career: UGRD Undergraduate
 PeopleSoft University

*Academic Standing Rule	*Effective Term	Term	Description	Short Description		
UGRD	0290	1997 Fall	Academic rules for undergrads	AS-Ugrd	+	-

Find | View All
1 of 1

Academic Standing Rule: UGRD
Effective Term: 0290 1997 Fall

GPA and Units Detail
Find | View All
First
1 of 8
Last

Seq. No: 10
***Academic Standing Action:** DIS1 Dismissal 1

Cumulative GPA:	LT	2.000	And/Or:	And
Current Term GPA:	LT	2.000	And/Or:	
Cumulative Units Passed:				
Current Units Passed:				
Cumulative Units Attempted:				
Current Units Attempted:				
Academic Year GPA:				

☐ Exclude No GPA Attempted Units

Academic Standing Rule page (1 of 2)

Academic Standing Detail

Find | View All First 1 of 8 Last

Seq. No: 10

Academic Standing Action: DIS1 Dismissal 1

☐ Any Academic Standing Set ☐ No Academic Standing Set

Prior Term Academic Standing:

PRB1

Probation 1

Academic Standing Rule page (2 of 2)

- Academic Standing Rule

Enter an alphanumeric code that identifies this academic standing rule code.
- Effective Term

Select the effective term of the rule. When the system uses the rules that you define here in the Academic Standing process, it verifies that the rule is effective within the term for which the process is running.
- Seq No (sequence number)

Enter the sequence number order in which the system evaluates the rule. Sequence your rules from the most severe academic standing action to the least severe. After a student's academic standing matches one academic standing rule, the Academic Standing process applies the academic standing action code to the student's record and moves on to the next student.
- Academic Standing Action

Enter the academic standing action code that you want the system to post to students' records if the rule is satisfied. The system populates the Academic Standing page with the appropriate code once you run the academic standing process.

Cumulative GPA, Current Term GPA, Cumulative Units Passed, Current Units Passed, Cumulative Units Attempted, Current Units Attempted, and Academic Year GPA

These criteria form your rules. For each criterion that you choose to use in this rule, select a qualifier: *Greater Than*, *Greater Than or Equal To*, *Less Than*, or *Less Than or Equal To*. Do not modify these values. Then, enter the numeric value for each criterion. In the preceding example, the cumulative grade point average must be less than 2.000 *and* the current grade point average must be less than 2.000.

Use the last prompt box to add the connector for the rule: *And*, *Or*, and blank for none.

You can skip any criteria and only enter information in the criteria pertinent for your rule. See the examples to understand the sequencing of rules.

Note. For the Academic Year GPA field, the system looks at the term for which academic standing is being processed, determines the academic year in which the term falls based on the value in the Term/Session Table component, determines the student's statistics from all terms in that academic year, calculates the student's grade point average, then compares the student's grade point average against the value that you enter on this page.

Exclude No GPA Attempted Units

Select this check box in order to exclude from reporting all classes that were attempted, but are not included in the student's GPA (for example, Pass/No Pass courses, W grades, and so on). The grade's corresponding Include in GPA check box on the Grading Scheme Table page must be cleared (not selected) in order for the system to exclude it from processing. Clear this check box in order to include in your report all attempted coursework, regardless of the assigned grade.

Any Academic Standing Set

Select if it does not matter what academic standing action codes students can have on their records prior to this rule evaluation. The other fields on the page become unavailable for input.

No Academic Standing Set

Select if the student's record should possess no academic standing action code.

Prior Term Academic Standing

Select any academic standing code that the student must possess in a prior term to satisfy the rule. For example, in the preceding page shot, the student must possess the *PRB1* (probation 1) code in addition to meeting the grade point average requirements.

Note. By selecting the No Academic Standing Set check box and selecting prior academic standing values, the academic standing rule reads as an OR statement. For this rule to apply, the student's record must either possess the academic standing values for the prior term that you select, possess no academic standing action code, or have no prior term for comparison.

Example of an Academic Standing Rule

Suppose that you defined seven different academic standing action codes for undergraduates. Because you want to use all of these codes in the Academic Standing process, you have eight rule detail lines in your academic standing rule, each line numbered from sequence number 10 (being the most severe academic standing action code) to sequence number 90 (being the least severe academic standing action code).

The following examples demonstrate some ways to set up academic standing rules.

The Sequencing of Rule Details

The Academic Standing Rule page looks like the following for the *Dismissal 2* action:

Academic Standing Rule

Academic Career: UGRD Undergraduate PeopleSoft University

*Academic Standing Rule	*Effective Term	Term	Description	Short Description		
UGRD	0290	1997 Fall	Academic rules for undergrads	AS-Ugrd	+	-

Find | View All 1 of 1

Academic Standing Rule: UGRD **Effective Term:** 0290 1997 Fall

GPA and Units Detail Find | View All First 2 of 8 Last

Seq. No: 20 ***Academic Standing Action:** DIS2 Dismissal 2

Cumulative GPA: LT 2.000 **And/Or:** And

Current Term GPA: LT 2.000 **And/Or:** And

Cumulative Units Passed:

Current Units Passed:

Cumulative Units Attempted: GE 20.000 **And/Or:**

Current Units Attempted:

Academic Year GPA: ☐ Exclude No GPA Attempted Units

Academic Standing Detail Find | View All First 2 of 8 Last

Seq. No: 20 **Academic Standing Action:** DIS2 Dismissal 2

☐ Any Academic Standing Set ☐ No Academic Standing Set

Prior Term Academic Standing:

PRB1 Probation 1 PRB2 Probation 2

PRB3 Probation 3

Example of academic standing rules (1 of 4)

On this page:

- The system evaluates this rule second because the sequence number is 20, and one other rule detail line with a lower sequence number exists.
- The cumulative grade point average and current grade point average requirements are higher than that of the sequence number 10 rule, but can be the same or less than that of subsequent rules.

You can have the same grade point average requirement, for instance, for probation and dismissal. Differentiate these actions by the prior academic standing codes students must possess.

- Students must possess one of the academic standing action codes listed in the Prior Term Academic Standing Value field in addition to satisfying the grade point average rules, to satisfy the *Dismissal 2* rule detail.

The Academic Standing Rule page looks like the following for the *Probation 2* academic standing action code:

Academic Standing Rule				
Academic Career: UGRD Undergraduate		PeopleSoft University		
*Academic Standing Rule	*Effective Term	Term	Description	Short Description
UGRD	0290	1997 Fall	Academic rules for undergrads	AS-Ugrd
Find View All 1 of 1				
Academic Standing Rule: UGRD		Effective Term: 0290 1997 Fall		
GPA and Units Detail				
Find View All First 4 of 8 Last				
Seq. No: 40	*Academic Standing Action: PRB2		Probation 2	
Cumulative GPA:				
Current Term GPA:	LT	2.000	And/Or:	
Cumulative Units Passed:				
Current Units Passed:				
Cumulative Units Attempted:				
Current Units Attempted:				
Academic Year GPA:			☐ Exclude No GPA Attempted Units	
Academic Standing Detail				
Find View All First 4 of 8 Last				
Seq. No: 40	Academic Standing Action: PRB2		Probation 2	
☐ Any Academic Standing Set		☐ No Academic Standing Set		
Prior Term Academic Standing:				
WRN1	Warning - may be placed on PRB		WRN2	Warning-may be placed on prbn

Example of academic standing rules (2 of 4)

On this page:

- The rule detail line will be evaluated fourth by the system because the sequence number is 40, and three other detail lines with lower sequence numbers precede it.
- The system will post the *Probation 2* academic standing action code on student records when they possess a current term grade point average less than 2.000 in conjunction with one of the academic standing action codes selected.
- Students must possess one of the academic standing action codes listed in the Prior Term Academic Standing Value field in addition to satisfying the grade point average rules, to satisfy the *Probation 2* rule detail.

Least Severe Rule Detail

In your rules, the least severe rule detail line is one for *Warning-may be placed on prbn* (warning-may be placed on probation).

The Academic Standing Rule page looks like the following for this rule:

Academic Standing Rule

Academic Career: UGRD Undergraduate PeopleSoft University

*Academic Standing Rule	*Effective Term	Term	Description	Short Description
UGRD	0290	1997 Fall	Academic rules for undergrads	AS-Ugrd

Find | View All 1 of 1

Academic Standing Rule: UGRD Effective Term: 0290 1997 Fall

GPA and Units Detail

Find | View All First 7 of 8 Last

Seq. No: 70 *Academic Standing Action: WRN2 Warning-may be placed on prbn

Cumulative GPA: LT 2.000 And/Or: And

Current Term GPA: GE 2.000 And/Or:

Cumulative Units Passed:

Current Units Passed:

Cumulative Units Attempted:

Current Units Attempted:

Academic Year GPA: ☐ Exclude No GPA Attempted Units

Academic Standing Detail

Find | View All First 7 of 8 Last

Seq. No: 70 Academic Standing Action: WRN2 Warning-may be placed on prbn

☐ Any Academic Standing Set ☐ No Academic Standing Set

Prior Term Academic Standing: WRN1 Warning - may be placed on PRB

Example of academic standing rules (3 of 4)

On this page:

- The rule detail line will be evaluated last by the system because the sequence number is 80, and seven other detail lines with lower sequence numbers precede it.
- Students must possess a cumulative grade point average and a current term grade point average that is greater than or equal to 2.000.

In addition, the student must possess one of the following academic-standing action codes stipulated on the Academic Standing Rule page.

- Students must possess at least one of the academic standing action codes on their record, in addition to the rules set on the Academic Standing Rule page to satisfy the *Warning-may be placed on prbn* rule detail.

Good Standing Rule Detail

In your rules, the last rule detail line is one for *Good Standing*.

The Academic Standing Rule page looks like the following for this rule:

Academic Standing Rule

Academic Career: UGRD Undergraduate PeopleSoft University

*Academic Standing Rule	*Effective Term	Term	Description	Short Description
UGRD	0290	1997 Fall	Academic rules for undergrads	AS-Ugrd

Find | View All 1 of 1

Academic Standing Rule: UGRD **Effective Term:** 0290 1997 Fall

GPA and Units Detail

Find | View All First 9 of 9 Last

Seq. No: 90 ***Academic Standing Action:** GOOD Good Standing

Cumulative GPA: GE 2.000 **And/Or:** And
Current Term GPA: GE 2.000 **And/Or:** Or
Cumulative Units Passed:
Current Units Passed:
Cumulative Units Attempted:
Current Units Attempted:
Academic Year GPA: ☐ Exclude No GPA Attempted Units

Academic Standing Detail

Find | View All First 9 of 9 Last

Seq. No: 90 **Academic Standing Action:** GOOD Good Standing

☒ Any Academic Standing Set ☐ No Academic Standing Set

Example of academic standing rules (4 of 4)

On this page:

- This detail line will be evaluated last because the sequence number is 90, and all other rule detail lines precede it possessing lower sequence numbers.
- Students must possess a cumulative grade point average and a current-term grade point average that is greater than or equal to 2.000.

In addition, the student may possess any academic standing action codes stipulated on the Academic Standing Rule page.

Linking Academic Standing, Honors, and Awards Rules to Academic Programs

Access the Standing/Honors page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors).

Academic Program

Standing/Honors

Taxonomy/Campus

Repeat/Incomplete

Enrollment

Academic Institution:

PSUNV

PeopleSoft University

Academic Program:

LAU

Liberal Arts Undergraduate

Find

View All

First

1 of 1

Last

Effective Date:

01/01/1900

Status:

Active

Academic Standing

Academic Standing Rule:

UGRD

Academic rules for undergrads

☐ Calculate in Batch Only

☒ Associate with Academic Prog

☐ Obey Fully Graded Date

Exclude Term Category 1:

Exclude Term Category 2:

Exclude Term Category 3:

Honors/Awards

Honor Award Rule:

UGRD

Undergraduate Honors

☐ Calculate in Batch Only

☐ Associate with Academic Prog

☐ Obey Fully Graded Date

Exclude Term Category 1:

M

Exclude Term Category 2:

Exclude Term Category 3:

Honor and Award Date Flag:

System Date

Standing/Honors page

Academic Standing

Academic Standing Rule Select the academic standing rule for this academic program.

Calculate in Batch Only

Select to calculate academic standing through a background process using the Academic Standing/Honors Awards page. If you select this check box, the system does not calculate academic standing dynamically, such as when you post grades.

Clear to have the system call the academic standing process when posting or changing a grade on the Quick Enrollment or Enrollment Request pages, and when posting a grade on the Grade Roster page. The academic standing process inserts an updated academic standing row, viewable on the Academic Standing page of the Term History component, except when a student's class is graded with a grade that count towards GPA and then later changed to a non-GPA grade. In such a scenario, you must manually update the student's academic standing on the Academic Standing page.

Obey Fully Graded Date

Select to calculate academic standing only when grades are posted on or later than the fully graded date. The system does not calculate academic standing if this check box is selected and grades are posted before the student's fully graded date. You define the default fully graded date on the Academic Term Calendar 3 page in the Academic Calendar component and an individual student's fully graded date on Term Control Dates page in the Term Activation component.

Associate with Academic Prog (associate with academic program)

Select to associate the academic standing rule only with students in this academic program. This is especially useful for students who might be in multiple academic programs; you might want to apply different academic standing rules with different academic programs. If you do not select this check box, the system associates the academic standing rule with the student's academic career.

Exclude Term Category 1, Exclude Term Category 2, and Exclude Term Category 3

Select the terms in which the system does not calculate academic standing. Values for this field are delivered with your system as translate values. You can modify these values.

Honors/Awards**Honor Award Rule**

Select the honor award rule for this academic program.

Calculate in Batch Only

Select to calculate the honors and awards in batch through the Academic Standing/Honors Awards page. If you select this check box, the system does not calculate honors and awards dynamically, such as when you post grades.

Obey Fully Graded Date

Select to calculate honors and awards only when grades are posted on or later than the fully graded date. The system does not calculate honors and awards if the Obey Fully Graded Date check box is selected and grades are posted before the student's fully graded date. You define the default fully graded date on the Academic Term Calendar 3 page in the Academic Calendar component and an individual student's fully graded date on Term Control Dates page in the Term Activation component.

Associate with Academic Prog (associate with academic program)	Select to associate the honor/award rule only with students in this academic program. This is especially useful for students who might be in multiple academic programs; you might want to apply different honor/award rules with different academic programs. If you do not select this check box, the system associates the honor/award rule with the student's academic career.
Exclude Term Category 1, Exclude Term Category 2, and Exclude Term Category 3	Select the terms in which the system does not calculate honors/awards. Values for this field are delivered with your system as translate values. You can modify these values.
Honor and Award Date Flag	Select the date type that the system posts to students' records for their honors and awards. Values for this field are delivered with your system as translate values. You can modify these values with some programming effort. Values are <i>System Date</i> and <i>Fully Graded Date</i> .

Setting Up Honors and Awards

To set up honors and awards, use the Honors/Awards Table component (SA_HONORS_AWARDS) and the Honors/Awards Rule component (HONOR_AWRD_RULE).

Honors and awards include internal and external awards that you want to record for students. With honor and award codes and rules, you can create sets of guidelines for every academic career within your institution. You can then use these codes and rules to assign honors and awards to students, either by running the Acad Standing/Honors Awards process (SRPCEASD) through the Academic Standing/Honors and Awards page to evaluate students' honors and awards, or by entering honor/award codes directly onto a student's record through the Honors and Awards page.

This section discusses how to:

- Define honor/award codes.
- Create honor and award rules.
- Link honor and award rules to academic programs.

See Also

[Chapter 41, "Tracking Student Data," Tracking Honors and Awards, page 1001](#)

Pages Used to Set Up Honors and Awards

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Honors/Awards Table	SA_HON_AWRD_TABLE	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Honors/Awards Table, Honors/Awards Table	Define honor and award codes for internal and external awards.
Honors and Awards Rule	HONOR_AWRD_RULE	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Honors/Awards Rule, Honors and Awards Rule	Create honor and award rules.
Standing/Honors	ACAD_PROG_STDG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors	Select honor and award rules and parameters for this academic program.

Defining Honor/Award Codes

Access the Honors/Awards Table page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Honors/Awards Table, Honors/Awards Table).

Internal/External	Indicate whether the honor or award relates to an external organization or your internal institution.
Grantor	Enter the grantor of the honor or award.
Transcript Level	Select the transcript level on which you want the honor or award to print. Values for this field are delivered with your system as translate values. These translate values can be modified. The delivered values are <i>Degr Prog</i> (degree progress), <i>Not Print</i> , <i>Official</i> , <i>Stdnt Life</i> (student life), and <i>Unofficial</i> .

Creating Honor Award Rules

Access the Honors and Awards Rule page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Honors/Awards Rule, Honors and Awards Rule).

Honors and Awards Rule

Academic Career: UGRD Undergraduate PeopleSoft University

*Honor Award Rule	*Effective	Term	Description	Short Desc		
UGRD	0290	1997 Fall	Undergraduate Honors	Ugrd Honor	+	-

Find | View All First 1 of 1 Last

Honor Award Rule: UGRD **Effective Term:** 0290 1997 Fall

GPA and Units Detail

Find | View All First 2 of 5 Last

*Honor/Award Group:	01	*Seq. No:	20		
*Honor/Award:	DEANLS	Dean's List			
Cumulative GPA:	GE		3.500	And/Or:	And
Current Term GPA:					
Cumulative Units Passed:					
Current Units Passed:					
Cumulative Units Attempted:					
Current Units Attempted:	GE		12.000		
Academic Year GPA:					

Find | View All First 2 of 5 Last

Honor/Award Group:	01	Seq. No:	20		
Honor/Award:	DEANLS	Dean's List			
Any Academic Standing Set	☒	No Academic Standing Set ☐			
Current Term Academic Standing:					

Honors and Awards Rule page

Define rules for every honor and award code that you want to use in the Honors/Awards process. Honor and award rules are keyed by academic career; therefore, create a broad description for your honor and award rules (such as *Undergraduate Rules* or *Graduate Rules*). To define honor and award rules, name the rule, define parameters for the rule, and select the academic standing codes that a student must currently possess in order for the rule detail line to be satisfied. Every rule detail line can have current academic-standing code requirements. For instance, you can require that in addition to other criteria you defined, the student possesses the academic standing code of *GOOD* to meet the requirements for the *Highest Freshman GPA Award*.

Honor Award Rule

Enter an alphanumeric code that identifies this honor and award rule code.

Effective Term

Select the effective term for the rule. When the system uses the rules in the Honor/Award process, it verifies that the rule is effective within the term for which the process is run.

Honor/Award Group	The default honor and award group number is 01. Group awards together that are mutually exclusive, because the system processes honors and awards by group, and within a group by sequence number. For example, the President's Award and the Dean's List honors are mutually exclusive. If students are granted one award they are not granted the other. By grouping the awards together, you prevent the system from granting a student both awards.
Seq No (sequence number)	Enter the sequence in which the system evaluates the rule. Sequence your rules from the most restrictive to the least restrictive. In our example, the President's Award has a sequence number of 10 and the Dean's List honor has a sequence number of 20. The President's Award is more restrictive than the Dean's List honor, so it is sequenced first. The Dean's List honor is slightly less selective, so it is sequenced second.
Honor/Award	Select the honor and award code that the system posts to students' records if they satisfy the rule. Define honor and award codes on the Honors/Awards Table page. The system populates the student Honors and Awards page with the appropriate code when you run the Honors/Awards process.
Cumulative GPA, Current Term GPA, Cumulative Units Passed, Current Units Passed, Cumulative Units Attempted, Current Units Attempted, and Academic Year GPA	These criteria form your rules. For each criterion that you choose to use in this rule, select a qualifier: <i>Greater Than</i>, <i>Greater Than or Equal To</i>, <i>Less Than</i>, or <i>Less Than or Equal To</i>. Do not modify these values. Then, enter the numeric value for each criterion. In the preceding example, the cumulative grade point average must be greater than or equal to 3.750 <i>and</i> the current grade point average must be greater than or equal to 3.750. Use the last prompt box to add the connector for the rule: <i>And</i>, <i>Or</i>, and blank for none. You can skip any criteria and only enter information in the criteria pertinent for your rule. Note. For the Academic Year GPA field, the system looks at the term for which academic standing is being processed, determines which academic year the term falls in based on the value in the Term/Session Table component, determines the student's statistics from all terms in that academic year, calculates the student's grade point average, then compares the student's grade point average against the value that you enter on the page.
Any Academic Standing Set	Select if the student would be eligible for this honor or award no matter what his or her academic standing.
No Academic Standing Set	Select if the student would be eligible for this honor or award only if he or she was not assigned an academic standing code.
Current Academic Standing Values	Select the academic standing values a student must possess to satisfy this rule. Define academic standing values on the Academic Standing Table page. In the preceding example, the student must possess the academic standing code of GOOD to satisfy the rule. Define academic standing values on the Academic Standing Table page.

Linking Honor Award Rules to Academic Programs

Access the Standing/Honors page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors).

See Also

[Chapter 11, "Preparing to Track Student Data," Linking Academic Standing, Honors, and Awards Rules to Academic Programs, page 270](#)

Setting Up Special Grade Point Averages

To set up special grade point averages, use the Student Special GPA component (SPECIAL_GPA_TYPE).

Every institution has its own unique way of calculating grade point averages. Special grade point averages are averages that you define for your institution that differ from the cumulative grade point average. You can enter special grade point averages for a student's academic program, academic plan, or academic subplan. You can then use these special grade point averages to meet your institution's analysis and reporting needs.

This section lists the page used to set up special grade point averages.

See Also

[Chapter 41, "Tracking Student Data," Tracking Special Grade Point Averages, page 1003](#)

Page Used to Set Up Special Grade Point Averages

Page Name	Definition Name	Navigation	Usage
Student Special GPA	SPCGPA_TYPE_TBL	Set Up SACR, Product Related, Student Records, Grading, Student Special GPA, Student Special GPA	Define the types of grade point averages (GPAs) that your institution tracks by entering an effective date, status, and description for each GPA type.

Reviewing Committees and Committee Members

Use committees to indicate advisory roles. Committees can be faculty standing committees, dissertation committees, thesis committees, and so on. Because committees are discussed in more detail in the *PeopleSoft Campus Community 9.0 PeopleBook*, we only review them briefly here.

To use committees and committee members:

1. Define committee types and the roles of committee members on the Committee Table page.
2. Assign specific committees to the committee types that you defined on the Committee Table page.
3. Assign committee members to specific committees on the Committee Members page.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Committee Data"

Setting Up Milestones

To set up milestones, use the Milestone Table component (MILESTONE_TBL) and Milestone Template component (MILESTONE_TMPL).

Milestones are non-course related but vital requirements that a student must complete toward degree progress to graduate. You might be able to relate milestones most easily to graduate student progress, but your institution might also use milestones for undergraduates as well. After you define milestones, you can assign milestones and advisors to a student, as well as record the student's completions of milestones and attempts to fulfill them, by using the Student Milestones component.

This section discusses how to:

- Define milestone codes.
- Create milestone templates.

See Also

Chapter 41, "Tracking Student Data," Tracking Milestones, page 1005

Pages Used to Set Up Milestones

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Milestone Table	MILESTONE_TBL	Set Up SACR, Product Related, Student Records, Enrollment, Milestone Table, Milestone Table	Define milestone codes and their grading bases, and define the levels of the milestone.
Milestone Templates	MILESTONE_TMPL	Set Up SACR, Product Related, Student Records, Enrollment, Milestone Templates, Milestone Templates	Create milestone templates to reduce data entry later on.

Defining Milestone Codes

Access the Milestone Table page (Set Up SACR, Product Related, Student Records, Enrollment, Milestone Table, Milestone Table).

Milestone Table

Milestone: **QUALEXAM** PeopleSoft University

Find 1 of 1

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

*Description: Qualifying Exam

*Formal Description: Qualifying Exam

Grading Scheme: GRA Graduate School Grading Scheme

Grading Basis: SUS Satisfactory/Unsatisfactory

Attempts Allowed: 3

*Transcript Level: Print on Official

*Print Milestone Detail: Always Print

Enter Milestone Levels Here Customize | Find | First 1 of 1 Last

*Milestone Level	*Description	*Formal Description
EXAM 1 - GEN	General Knowledge Examination	General Knowledge Examination

Milestone Table page

Note. To inactivate a milestone code, remove that code from every milestone template in addition to entering a status of Inactive on this page.

Grading Scheme

Select a grading scheme for the milestone. When you enter the milestone on a student's record, you can override the grading scheme.

Grading Basis

Select a grading basis for the milestone. Link grading bases to grading schemes on the Grading Scheme Table page. You can override this value on individual student records.

Attempts Allowed

Enter the number of attempts students can make at completing the milestone. This field is a default data entry and tracking aid. You can override the attempts allowed on individual student records.

Print Milestone Detail

Select a print milestone detail to indicate if the milestone detail information will appear on the transcript. Milestone detail information includes the details on the Student Milestones page.

Milestone Level

Enter an alphanumeric code that identifies this milestone level code. You use milestone levels for detailing the progress of a milestone and for informational purposes. For example, you might define a milestone of *Written Comprehensive Exams* for doctoral students and have four levels within that milestone to designate the four sets of comprehensives required.

(NZL) Defining Milestones for Unit Standards

When you define a milestone for New Zealand institutions, the Milestone Type field and NQF Detail link are available. Enter milestone type *U*, and use the NQF Detail page to link NQF codes to the milestone.

See [Chapter 18, "\(NZL\) Setting Up Government Reporting," Linking NQF Codes to Milestones, page 463.](#)

See Also

[Chapter 14, "Setting Up Transcripts," page 311](#)

Creating Milestone Templates

Access the Milestone Templates page (Set Up SACR, Product Related, Student Records, Enrollment, Milestone Templates, Milestone Templates).

Milestone Templates

Academic Institution: PeopleSoft University
 Academic Career: Graduate

Academic Program:
Academic Plan:

Find | View All 1 of 1

*Effective Date: 01/01/1900

*Status: Active

*Description: Graduate

Find | View All 1 of 2

Milestone Nbr: 10

*Milestone: QUALEXAM

*Description: Qualifying Exam

*Formal Description: Qualifying Exam

Grading Scheme: GRA Graduate School Grading Scheme

Grading Basis: SUS Satisfactory/Unsatisfactory

*Transcript Level: Print on Official

*Print Milestone Detail: Always Print

Attempts Allowed: 3

Milestone Templates page

If you link a milestone template to only an academic institution and academic career, it can be used as a template for any academic program or plan. If you want a milestone template to be restricted to a specific academic program or plan, enter the program and plan in the search dialog box. When you link milestones to academic programs you are making a template, not a permanent link. This information appears in the Student Milestones component when you copy the template to the student's record.

Milestone Nbr (milestone number)	Enter a milestone number to define the sequence of multiple milestones within a template. The sequence number is for your information only. In our example, sequence numbers for each milestone increase by ten. You can sequence these however you want.
Milestone	Select a milestone code.
Grading Scheme	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.
Grading Basis	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.
Print Milestone Detail	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.
Attempts Allowed	The system populates this value from the value entered on the Milestone Table page, based on the milestone code. You can override this value.

Setting Up Extracurricular Activities

To set up extracurricular activities, use the Extracurricular Activity Table component (EXTRA_ACTIVITY_TBL).

You can track both internal and external extracurricular activities for individuals.

This section discusses how to set up extracurricular activity codes for this purpose. You will later use the Extracurricular Activity page to link these codes to students.

Page Used to Set Up Extracurricular Activities

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Table, Extracurricular Activity Table	Set up extracurricular activity codes, and define the primacy of the extracurricular activities for your setID.

Setting up Extracurricular Activity Codes

Access the Extracurricular Activity Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Table, Extracurricular Activity Table).

Extracurricular Activity Table

SetID:PSUNV

Extracurricular Activity:B01

Description

Find | View All | First 1 of 1 Last

*Effective Date:01/01/1900

*Status:Active

*Description:Student Body President

Short Description:Student Bo

*Activity Type:Student Government

Activity Offering

☐ Internal and External

☒ Internal

☐ External

Extra Activity Primacy:

Extracurricular Activity Table page

Activity Type

Select the type of activity that you are entering. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Athletics*, *Club*, *Employment*, *Music*, *Other*, *Publications*, *Student Government*, *Theater*, and *Volunteer*.

Internal and External

Select this option to indicate that this extracurricular activity exists at your institution as well as at external institutions.

Internal

Select this option to indicate that this extracurricular activity exists at your institution only.

External

Select this option to indicate that this extracurricular activity exists at external institutions only.

Extra Activity Primacy

Enter the primacy number for this extracurricular activity. When you run the Consolidate Academic Statistics process it searches students' extracurricular activity records for only the *athlete* extracurricular activity. The *athlete* extracurricular activity is delivered with your system. It should not be modified in any way because it has code attached to it. If the Consolidate Academic Statistics process finds multiple *athlete* records for a student, it writes the one with the lowest primacy number to the student's consolidated statistics record.

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See Also

[Chapter 46, "Consolidating and Reporting Academic Statistics," page 1157](#)

Managing Student Groups

Student groups enable you to set up groups (such as *Athlete* or *Freshman*) and assign these groups to individuals. Then you can perform actions (such as run reports and processes) on a group, which affects all of the individuals in the group.

This section lists the page used to manage student groups. You will later use the Student Groups page to assign student groups to students.

Page Used to Manage Student Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Groups	STDNT_GROUPS	Student Recruiting, Maintain Prospects, Academic Information, Student Groups, Student Groups	Set up student groups (such as <i>Athletes</i> and <i>Resident Assistants</i>) by entering the effective date, status, and description of each student group.

Setting Up Student Attributes

To set up student attributes, use the Student Attribute Table component (STDNT_ATTR_TBL).

This section provides an overview of student attributes and discusses how to:

- Define student attribute codes.
- Define student attribute values.

See Also

[Chapter 41, "Tracking Student Data," Tracking Student Attributes, page 1013](#)

Understanding Student Attributes

Although student groups enable you track attributes such as participation in clubs, sports, and student government, you might need an additional, more flexible structure that lets you track the attributes of your students based on their career and program. To meet this need, use the Student Attributes feature.

The Student Attributes feature enables you to assign all sorts of attributes to a student within an academic career or program and group together the students with similar student attributes. You can then track and report on the student attribute data. For instance, you can track students that begin their education at the same time as a single cohort by creating a student attribute for undergraduate incoming freshmen and attaching the attribute to the records of these students. You can then use the data for federal reporting and also for institutional research purposes to gain information about the type of students that you have in a particular cohort, such as a student's typical course load or how long it takes a student to complete his or her program and graduate.

You can create multiple attributes and multiple attribute values within a single attribute. Then when you assign these attributes to students, you can attach to their records multiple attributes and multiple values within each student attribute. With this flexibility, your students can belong to as many cohorts as necessary to meet your tracking and reporting needs. You can assign these attributes to students at any time, even during the recruiting and admissions processes because the attributes roll from PeopleSoft Recruiting and Admissions to Student Records as part of the student's academic career and academic program.

Use the Student Attribute Table component to define different student attributes and student attribute values. You can create broad student attributes for entire academic careers, then attach single student attribute values to each of those careers. For example, you can create a student attribute for undergraduate students called *Student Cohort*. You can then create different values for *Student Cohort* on the Student Attribute Value Table page (such as *Fall 2005 Entry Class*, *Fall 2006 Entry Class*, and *Fall 2007 Entry Class*). In addition, you can create smaller student attributes for individual academic programs. You can also define student attribute values for plans and subplans and group them under a specific academic program.

After you define all your student attributes and student attribute values, use the Student Attributes page to attach these attributes and attribute values to individual students and build reports on the data so you can track statistics such as how many students in a particular cohort graduated in three years, four years, and five years, and how heavy their course load was. The system also reports a primary student attribute as part of the Consolidate Academic Statistics process.

Pages Used to Set Up Student Attributes

Page Name	Definition Name	Navigation	Usage
Student Attributes Table	STDNT_ATTR_TBL	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Student Attribute Table, Student Attributes Table	Define the various student attributes your institution uses for tracking and reporting on different cohorts.
Student Attribute Value Table	STDNT_ATTR_VAL_TBL	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Student Attribute Table, Student Attribute Value Table	Define the values associated with a particular student attribute.

Defining Student Attribute Codes

Access the Student Attributes Table page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Student Attribute Table, Student Attributes Table).

- Academic Career

(Optional) Select the academic career to which the student attribute is linked.
- Academic Program

(Optional) Select the academic program to which the student attribute is linked.

Defining Student Attribute Values

Access the Student Attribute Value Table page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Student Attribute Table, Student Attribute Value Table).

Student Attributes Table

Student Attribute Value Table

Find | View All

First 1 of 1 Last

Academic Institution:

PSUNV

PeopleSoft University

+ -

Student Attribute:

CHRT

Student Cohort

Effective Date:

01/01/1900

Find | View All

First 1-3 of 3 Last

*Student Attribute Value	*Description	Short Description	Primacy	+ -
FALL1998	Fall 1998 Entry Class	Fall 1998		+ -
FALL1999	Fall 1999 Entry Class	Fall 1999		+ -
FALL2000	Fall 2000 Entry Class	Fall 2000		+ -

Student Attribute Value Table page

- Student Attribute Value

Enter an alphanumeric code that identifies this student attribute value.
- Primacy

Enter the primacy number for the student attribute. The system uses the number to determine the primary student attribute value it uses when you extract data to report on cohorts. This primacy value has no relation to Financial Aid primacy. The lowest number takes precedence.

Note. Always assign the lowest primacy number to the student attribute value that you want to use for federal reporting of this student attribute.

Chapter 12

Setting Up Grading

This chapter provides an overview of grade preparation and discusses how to set up your system for grading.

See Also

[Chapter 43, "Grading Students," page 1043](#)

PeopleSoft Gradebook 9.0 PeopleBook, "Using the Self-Service Gradebook"

Understanding Grade Preparation

Student Records provides a variety of grade-related features. From institution and career-based rules to repeat schemes, grade rosters, grade change audits, and midterm deficiency analysis, you can use the different grade-related components to set up and manage grading processes.

Grade bases comprise individual grades, and grade schemes comprise grade bases. Typically, grade schemes are unique for each career in your institution. Grade schemes are not manually assigned to individual classes. Instead, the system dynamically matches grade schemes that are assigned to one career with classes of the same career.

Before you can grade students, you must define all possible grading schemes for all careers. You can have different grading schemes for different careers. Within each grading scheme, you define all valid grade bases, grades, and grade-related detail.

In addition, the system enables you to convert grades from one grading scheme to another. We call this grade-basis mapping feature our *intelligent grade basis exception table*. For example, when an undergraduate student enrolls in a graduate course (and the graduate course is associated with a graduate grading scheme), you might not want to grade the student according to the graduate grade scheme. Rather, you set up exception rules so that the system reroutes the student's grade scheme to the appropriate undergraduate grade scheme. On the Grading Basis Exception Rule page, you define all possible exception scenarios that the system must handle. For example, you can set up a rule that requires the system to convert a graduate grading scheme into an undergraduate grading scheme. This way, you ensure that grade schemes are appropriate for the student, based on the student's career (rather than the career of the class). Setting up exception rules is optional.

Finally, when all of your grade data is set up and instructors are ready to enter grades, you must generate the grade rosters. You can generate rosters on an individual class basis or in batch. Generating the rosters is a required, final step in making the rosters available for grade entry.

Setting Up Your System for Grading

To set up your system for grading, use the Grading Scheme Table component (GRADE_SCHEME) and the Grading Basis Exception Rule component (GRD_BASE_EXCEPTION).

This section provides an overview of grading setup and discusses how to:

- Define grading schemes.
- Define grading basis exception rules.
- Run the Grade Basis Exception report.
- Create grade rosters for a single class.
- Create grade rosters for multiple classes.

Understanding Grading Setup

Complete these steps to set up grading:

1. Define grade basis values:
 - a. Select PeopleTools, Utilities, Translate Values to add or change translate values.
 - b. Search on the GRADING_BASIS field name, which takes you to the table where you define grade basis values.
2. Define grading schemes on the Grading Scheme Table page.
3. (Optional) Define grade basis exceptions on the Grading Basis Exception Rule page.
4. (Optional) Run the Grade Basis Exception Report to review active grade basis exception mapping rules and their details.
5. Generate grade rosters on either the Grade Roster Type page or the Create Grade Rosters page.

Pages Used to Set Up Your System for Grading

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Grading Scheme Table	GRADING_SCHEME_TBL	Set Up SACR, Foundation Tables, Academic Structure, Grading Scheme Table, Grading Scheme Table	Define all valid grading schemes. Enter each grading scheme and the associated grades on this page.

Page Name	Definition Name	Navigation	Usage
Grading Basis Exception Rule	GRD_BASE_EXCEPTION	Set Up SACR, Product Related, Student Records, Grading, Grading Basis Exception Rule, Grading Basis Exception Rule	Map typical student-requested grade bases to existing grading basis rules.
Grade Basis Exception	RUNCTL_SRGBEXCPT	Set Up SACR, Product Related, Student Records, Reports, Grade Basis Exception, Grade Basis Exception	Run reports that display active grade basis exception mapping rules and their details.
Grade Roster Type	GRADE_ROSTER_TYPE	Curriculum Management, Grading, Grade Roster, Grade Roster Type	Define grade rosters on a class-by-class basis. To print the grade roster, use the Grade Roster Print page. Prerequisite: If you want to use blind grading for this class, select the Use Blind Grading check box on the Class Associations page or select the Use Blind Grading check box on the Course Catalog Offerings page. Then, the system populates the Use Blind Grading check box each time that you create a class association.
Create Grade Rosters	RUNCTL_GRD_ROSTER	Curriculum Management, Grading, Create Grade Rosters, Create Grade Rosters	Create grade rosters for each term and session by subject area or by academic organization. To print the grade rosters, use the Grade Roster Print page. If you want to use blind grading for this class, select the Use Blind Grading check box on the Class Associations page or select the Use Blind Grading check box on the Course Catalog Offerings page so that the system uses blind grading each time that you schedule the class. The system then populates the Use Blind Grading check box each time that you create a class association.

Page Name	Definition Name	Navigation	Usage
Complete Grade Flag	SSR_GRADE_FLAG_TBL	Set Up SACR, Product Related, Student Records, Grading, Complete Grade Flag, Complete Grade Flag	Define complete grade flag values to be used on the Grading Scheme Table page. In New Zealand, these values are used for reporting purposes.

Defining Grading Schemes

Access the Grading Scheme Table page (Set Up SACR, Foundation Tables, Academic Structure, Grading Scheme Table, Grading Scheme Table).

Grading Scheme Table

[Find](#) | [View All](#) First 1 of 1 Last

SetID: PSUNV **Grading Scheme:** UGD

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

***Description:** Undergraduate Grading Scheme **Short Desc:** Undergrad

Grade Basis

[Find](#) | [View All](#) First 1 of 8 Last

***Grade Basis:** AUD Audit ☐ Include in GPA

Formal Description: Audit

Grade Basis Convert:

Grade Basis Choice Default:

Default AA What If Grade: AU Audit

☐ Grade Required
☐ Elective Grade Basis
☒ Print On Transcript
☒ Print Grade Basis Desc
☒ Audit Grade Basis

Grade Input

[Find](#) | [View All](#) First 1 of 2 Last

***Grade Input:** AU **Convert To Grade:**

***Description:** Audit

***Short Desc:** Audit ☐ Exclude Progress Units

Grade Points: 0.000 ***Grade Category:** NONE

Complete:

☐ In Progress Grade ☐ Include in GPA ☐ Earn Credit ☐ Valid Attempt ☐ Include in Self Service

***Repeat Checking Option:** 4) Count = N Process = N

Drop/Withdraw Penalty Grades

Drop with Penalty: W Withdrew **Withdraw with Penalty:** W Withdrew

Drop with Greater Penalty: W Withdrew **Withdraw with Greater Penalty:** W Withdrew

Grading Scheme Table page

Grading schemes are linked to academic careers and academic programs.

Status	Enter a status for this grading scheme. Enter <i>Active</i> when adding a new grading scheme. Enter <i>Inactive</i> only if your institution no longer uses this grading scheme.
Description	Enter a description for the grading scheme.
Short Desc (short description)	Enter a short description for the grading scheme.
Grade Basis	Enter a grade basis. Grade basis values are entered into your system as translate values, which you can modify.
Formal Description	Enter a formal description of the grading basis.
Grade Basis Convert	Enter a grade basis convert value to use grades that are associated with another grading basis. If you enter a value in this field, the Grade Input group box becomes unavailable because the grade basis references the grade input data of another grade basis.
Grade Basis Choice Default	If you select the Elective Grade Basis check box, you can enter a grade basis choice default to specify the default grade basis for this grading scheme. In addition, you can enter all of the possible grading basis choices in the fields that become available in the bottom third of the page. The system uses the default value during enrollment. If students have the option to select other grade bases, they can do so at enrollment time.
Include in GPA (include in grade point average)	Select to include grades from this grading scheme in grade point average (GPA) calculations.
Grade Required	Select to specify this grade basis as required, for the purposes of the Grade Review - Transcript Release process. When you evaluate students using the Grade Review process, those classes in which the students are enrolled with a <i>required</i> grade basis must have all of their grades; otherwise, a transcript is not generated for the student. Selecting this option can prevent transcripts from printing until all of a student's term grades are posted. See Chapter 45, "Producing Transcripts," Processing Batch Transcripts (Application Engine), page 1122.
Elective Grade Basis	Select to enter the grading bases from which the student may select during enrollment.
Print on Transcript	Select to display, on the transcript, classes that are graded with this grade basis. If you do not select this option, all class data for courses that have grades that are from this grade basis do <i>not</i> appear on the transcript.
Print Grade Basis Desc (print grade basis description)	Select to have the formal description of the grade basis appear on the transcript.

Audit Grade Basis	Select to indicate that the grading scheme is audit-only. If you select this check box, the following check boxes in the Grade Input group box become unavailable: In Progress Grade, Include in GPA, and Earn Credit.
Grade Input	If you enter a grade basis and clear the Elective Grade Basis check box, or if you do not enter a value in the Grade Basis Convert field, the Grade Input field becomes available. Enter all of the valid grade values for the grading scheme in the Grade Input field. Add rows as necessary.
Convert To Grade	When you post grades, the system converts the originally entered grade to the convert to grade if a value exists in the Convert to Grade field. This field is optional. The convert to grade must be within the grading scheme that you are currently defining.
Description	Enter a description for the grade input.
Short Desc (short description)	Enter a short description for the grade input.
Exclude Progress Units	Select to have the system exclude this grade from progress units. For example, you would select this check box for a <i>W</i> or withdrawal grade.
Grade Points	Enter the grade points for the grade input. The system uses these grade points, in conjunction with the units attempted for the class, when it calculates GPA.
Complete	This field is user-defined. Define complete values on the Complete Grade Flag page. In New Zealand, this field is used for reporting purposes.
Grade Category	Use this field to give a grade additional identity. You can assign a grade category to a particular grade or a group of grades, and then use these assignments for advanced advising analysis purposes, such as prerequisite checking or academic advising limits. By default, the system populates the Grade Category field with <i>None</i>. A typical example of a grade category is <i>Pass</i> or <i>Transfer Pass</i>. You can use academic advising to limit the number of classes with grade categories of <i>Transfer Pass</i> that count toward degree requirements. Select from a list of grade categories that are defined by your institution. Grade categories are defined on the Grade Category Table page. See <i>PeopleSoft Academic Advisement 9.0 PeopleBook</i>, "Setting Up Optional Advisement Data," Setting Up Grade Category Values.
In Progress Grade	Select to indicate that this is an in-progress type of grade. A typical example of an in-progress grade would be an incomplete grade.
Include in GPA (include in grade point average)	Select to include the grade that you specify in GPA calculations. An example of when you would <i>not</i> select this check box is for a <i>Pass</i> grade.
Earn Credit	Select to specify that the grade can be counted toward course and academic advising credit.

Valid Attempt

Select to mark each grade value as representing a valid course attempt. PeopleSoft Academic Advisement uses this setting to distinguish between grades for valid course attempts (A, B, C, D, F, and so forth) and grades for invalid course attempts (AU, W, and so forth).

If you select this check box, Academic Advisement can distinguish between valid and invalid course attempts when the values in the Units Attempted, Earned Credit, and GPA fields are the same.

Include in Self Service

Select to enable the grade input value to be assigned and edited on the Faculty Center Grade roster. If you clear this check box, instructors cannot assign or edit this grade on the self-service grade roster. A typical example is to clear the check box for a W, an administrative withdrawal grade.

Repeat Checking Option

Select an option to indicate whether a class with this grade should be counted as a repeat candidate and whether the class should be processed by the Repeat Checking process. Values are:

- 1) *Count = Y Process = Y*: If you select this option, any class with this grade is counted in the pool of repeat attempts and is selected and processed when the Repeat Checking process is run.
- 2) *Count = Y Process = N*: If you select this option, any class with this grade is counted in the pool of repeat attempts, but is not selected and processed when the Repeat Checking process is run.
- 3) *Count = N Process = Y*: If you select this option, any class with this grade is not counted in the pool of repeat attempts, but is selected and processed when the Repeat Checking process is run.
- 4) *Count = N Process = N*: If you select this option, any class with this grade is not counted in the pool of repeat attempts, nor is it selected and processed when the Repeat Checking process is run.

This table shows an example:

<i>Course</i>	<i>Grade</i>	<i>Units Attempted</i>	<i>Earned Credit</i>	<i>GPA</i>	<i>Valid Attempt</i>
English 101	W (user defined)	3.00	0.00	0.00	No
English 101	F	3.00	0.00	0.00	Yes

Note. The PeopleSoft Academic Advisement application considers class attempts that have no grade as valid attempts.

Drop/Withdraw Penalty Grades

When processing drops during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you do not define penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define on the Session Calendar1 page (for withdraw grades) and the Session Calendar 2 page (for drop grades). We strongly suggest that you define penalty grades at the grade basis level to ensure that students receive penalty grades specific to their intended grade basis for the class, and not the penalty grade that is assigned to all students in the session, regardless of whether the penalty grade is from the student's original grade basis.

For example, when you drop a student from a class for which the `stdnt_enrl.grading_basis_enrl = AUD` during Drop With Greater Penalty and a drop with greater penalty grade exists in the `GRADE_TBL` for AUD, the system assigns the drop with greater penalty grade to the student. If no drop with greater penalty grade exists at the grade table level for an AUD grade basis, the system instead uses the grading basis and grade from the `ACAD_CALSES_TBL`, as defined on the Session Calendar2 page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Traditional Academic Calendars," Setting Up Session Cancellation and Withdrawal Dates.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates.

Drop with Penalty

Enter the penalty grade that students who are enrolled with this grade basis receive for a class if they drop the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline. The grade for the class appears on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Drop with Greater Penalty

Enter the grade that students who are enrolled with this grade basis receive for a class if they drop the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Withdraw with Penalty

Enter the grade that students who are enrolled with this grade basis receive for a class if they withdraw after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. The grade for the class appears on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Withdraw with Greater Penalty

Enter the grade that students who are enrolled with this grade basis receive for a class if they withdraw after the withdraw-with-penalty deadline but on or before the withdraw-with-greater penalty deadline. The grade for the class appears on students' transcripts and affect their GPA accordingly. Grade values are defined on the Grading Scheme Table page.

Grade Scheme Example: Using an Elective Grading Basis

Select the Elective Grade Basis check box for grade bases that permit students to choose different modes of grading for a class. Before you select this check box, define all of your grading basis choices.

Grading Scheme Table

Find | View All

First 1 of 1 Last

SetID: PSUNV

Grading Scheme: UGD

'Effective Date: 01/01/1900

'Status: Active

'Description: Undergraduate Grading Scheme

Short Desc: Undergrad

Grade Basis

Find | View All

First 4 of 8 Last

'Grade Basis: OPT Student Option

Formal Description: Student Option

Grade Basis Convert:

Grade Basis Choice Default: GRD Graded

Default AA What If Grade:

☐ Include in GPA
☒ Grade Required
☒ Elective Grade Basis
☐ Print On Transcript
☐ Print Grade Basis Desc
☐ Audit Grade Basis

Grading Basis Choice

Find

First 1-3 of 3 Last

'Grading Basis Choice: AUD Audit

'Grading Basis Choice: GRD Graded

'Grading Basis Choice: PNP Pass/Not Pass

Example of elective grade basis, Grading Scheme Table page

On this page, select:

- The Elective Grade Basis check box.

The system displays the Grading Basis Choice scroll area.

- All valid possible grading basis choices from which a student can choose for a class that is offered with this grade basis of *OPT*.

Grade Scheme Example: Converting Grade Basis

Enter a grade basis in the Grade Basis Convert field for *Satisfactory/Unsatisfactory(SUS)* grades to convert to your new and preferred grade basis of *Pass/Not Pass(PNP)*.

Grading Scheme Table

Find | View All First 1 of 1 Last

SetID: PSUNV Grading Scheme: UGD

Effective Date: 01/01/1900 Status: Active

Description: Undergraduate Grading Scheme Short Desc: Undergrad

Grade Basis Find | View All First 6 of 8 Last

Grade Basis:	SUS	Satisfactory/Unsatisfactory	☐ Include in GPA
Formal Description:	Satisfactory/Unsatisfactory		☒ Grade Required
Grade Basis Convert:	PNP	Pass/Not Pass	☐ Elective Grade Basis
Grade Basis Choice Default:			☐ Print On Transcript
Default AA What If Grade:	S	Satisfactory	☐ Print Grade Basis Desc
			☐ Audit Grade Basis

Example of converting grade bases, Grading Scheme Table page

On this page, select the grade basis value in the Grade Basis Convert field. All courses that have a grade basis of *SUS* convert to a grade basis of *PNP*.

Grade Scheme Example: Setting Up a Requirement That References a Grade Category

At PSUNV, the maximum number of pass grades that can apply towards a Bachelor's degree is 24 units. From these 24 units, no more than six units can be from another institution. To establish this academic advising limit on pass grades, create two grade categories on the Grade Category Table page: *PASS* for Internal Pass and *TXFR* for Transfer Pass. Then, on the Grading Scheme Table page, assign to the grade *P* the grade category of *PASS* and assign to the grade *T* the grade category of *TXFR*.

In PeopleSoft Academic Advisement, create an academic requirement that is a global limit. Its first requirement line points to a derived list of all courses on a student's transcript with a grade that has a grade category of *PASS* and a derived list of all courses on a student's transcript with a grade category of *TXFR*. The requirement line limit allows a maximum of 24 units and maximum of 999 courses (the system enforces the lower of these). Create a second requirement line (in the same academic requirement) that is also a global limit. It points to a derived list of all courses on a student's transcript with a grade that has a grade category of *TXFR*. The requirement line limit allows a maximum of six units. Attach this academic requirement to a requirement group at the career level, with a low reporting sequence number, so that the degree audit system evaluates it first during an advising evaluation. Any courses over the limit of allowed credits are excluded from the evaluation and are not counted towards the remaining career, program, plan, or subplan degree requirements.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements," Setting Up Requirement Line Item Detail

Defining Grading Basis Exception Rules

Access the Grading Basis Exception Rule page (Set Up SACR, Product Related, Student Records, Grading, Grading Basis Exception Rule, Grading Basis Exception Rule).

Grading Basis Exception Rule

Find | View All First 1 of 1 Last

Academic Institution: PSUNV PeopleSoft University

Grading Basis Mapping Rule: UGRAD

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

***Description:** Undergraduate Mappings

***Short Description:** Undergradu

Grading Basis Mapping

Find First 1-5 of 5 Last

*Grading Basis for Requested Class	Grading Basis Mapped for Student
☐ CNC Crd/No Crd	☐ Grading Basis is Invalid
☐ GRD Graded	☐ Grading Basis is Invalid
☐ PNP P/NP	☐ Grading Basis is Invalid
☐ SUS Sat/Unsat	☐ Grading Basis is Invalid
☐ TRN Transfer	☒ Grading Basis is Invalid

Grading Basis Exception Rule page

If grade bases are variable at your institution, you should define grade basis mapping rules. When students in one academic program or career enroll in classes in another program or career (that have a different grade basis), the system uses your grade basis mapping rules to convert grade basis values to those that are appropriate for the students' careers and programs.

Grading basis rules designate any and all schemes for grading, including the grade points for each grade.

You link grading basis exception rules to career pointer exception rules. Career pointer exceptions are linked to academic programs.

Grading basis exception rules are keyed by academic institution.

Effective Date

Enter an effective date for this mapping rule.

Status

Enter a status for this mapping rule. Enter *Active* when adding a new mapping rule. Enter *Inactive* only if your institution no longer uses the mapping rule.

Note. If you inactivate the grading basis mapping rule, you must also remove it from the Career Pointer Exception page.

Description

Enter a description for the mapping rule.

Short Description

Enter a short description for the mapping rule.

Grading Basis for Requested Class	The grading basis from which you are mapping. Grading basis values are defined on the Grading Scheme Table page. Warning! If a student attempts to enroll in a mapped cross-career course and the student selects a grade basis that you did not specify in the Grading Basis for Requested Class field as eligible for remapping, then the system considers their request invalid and denies the enrollment request.
Grading Basis is Invalid	Select to invalidate the grading basis. In the preceding example, the <i>Transfer</i> grading basis is invalid. Students cannot select the <i>Transfer</i> grading basis for classes with this mapping rule.
Grading Basis Mapped for Student	The grading basis to which you are mapping. In our example, when an undergraduate student enrolls in a graduate class with a grading basis of <i>Satisfactory/Unsatisfactory</i>, the system converts their grade basis to <i>Pass/No Pass</i>. Grading basis values are defined on the Grading Scheme Table page. Note. When a student enrolls, the mapped values appear prior to posting the enrollment, regardless of whether the student is using PeopleSoft Enrollment Request, Enrollment, Quick Enroll, or Student Self Service Enrollment.

Grade Basis Mapping Example

To understand how the enrollment engine determines the grade basis for a particular enrollment, look at how the system determines whether a student can enroll in a class that is not in the student's career. For example, Michael Holt, an undergraduate, wants to enroll in Marketing 500 in the Graduate Business career.

<i>Michael's Career and Program</i>	<i>Requested Class</i>	<i>Course's Career</i>	<i>Grading Basis of Course</i>	<i>Expected Grading Basis</i>
Undergraduate/liberal arts undergraduate (LAU) program	Marketing 500	Graduate Business	Satisfactory/Unsatisfactory (SUS)	Pass/No Pass (PNP)

When Michael tries to enroll in Marketing 500, the system first looks at the Career Pointer Exception Rule field on the Academic Program page for Michael's academic program (LAU).

Academic Program		Standing/Honors	Taxonomy/Campus	Repeat/Incomplete	Enrollment
Academic Institution:	PSUNV PeopleSoft University				
Academic Program:	LAU				
Find View All First 1 of 1 Last					
*Effective Date:	01/01/1900	*Status:	Active		
*Description:	Liberal Arts Undergraduate				
*Short Description:	Lib Arts	First Term Valid:	0000	Begin Term	
*Academic Career:	UGRD	Undergraduate			
Grading Scheme:	UGD	Undergraduate Grading Scheme			
GB Default for Transfer Credit:	GRD	Graded			
Default Grade- Transfer Credit:	T	Transfer			
*Academic Group:	LBART	College of Liberal Arts			
*Academic Level Rule:	UGRD	Undergraduate			
*Academic Calendar:	USEM	Undergraduate Semester Cal			
Dual Academic Program:					
Default Academic Plan:	UNDECL-UG	Undeclared Undergraduate			
Default Campus:	WALCR	Walnut Creek Campus			
*Transcript Level:	Official				
Career Pointer Exception Rule:	LIBARTS	Liberal Arts Exceptions			
☒ Only if Outside Career					

Viewing career pointer exception rules on the Academic Program page (ACADEMIC_PROG_TBL)

If the field is cleared, grading basis mapping does not occur. Instead, the system looks at the Academic Career Pointers page to determine whether the student is eligible to enroll in the class. If enrollment is allowed, the system pulls from the course grading scheme as determined by the academic career that is noted on the Course Catalog - Offerings page. However, in our example, *LIBARTS* is selected in the Career Pointer Exception Rule field. Therefore, the system uses the LIBARTS exception rule on the Career Pointer Exception Rule page.

Career Pointer Exception Rule

Academic Institution: PSUNV PeopleSoft University

Career Pointer Exception Rule: LIBARTS

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

***Description:** Liberal Arts Exceptions

***Short Description:** Lib Arts

Course Requested				
*Academic Group	Subject Area	Catalog Nbr	*Allow Enrollment	Grading Basis Mapping Rule
LBART	MATH	300	Yes	UGRAD
LBART	MATH	400	Permission	UGRAD

Viewing grading basis mapping rules on the Career Pointer Exception Rule page (CAR_PTR_EXCEPTIONS)

The system searches the Course Requested group box for rows that match the class in which the student is enrolling. In our example, Michael Holt is trying to enroll in Marketing 500. The system looks at the Academic Group, Subject Area, and Catalog Nbr (catalog number) fields. The catalog number of the requested course must be equal to or greater than the catalog number on this page. Because Marketing 500 is in the *MGMT* academic group and the *Marketing* subject area, and it is greater than or equal to 500, the system allows Michael to enroll in the class with permission. The system then maps the grading basis to the student's career or program using the value in the Grading Basis Mapping Rule field (*UGRAD*). Grading basis mapping rules are defined on the Grading Basis Exception Rule page.

Grading Basis Exception Rule

Academic Institution: PSUNV PeopleSoft University

Grading Basis Mapping Rule: UGRAD

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

***Description:** Undergraduate Mappings

***Short Description:** Undergradu

*Grading Basis for Requested Class		Grading Basis Mapped for Student	
☐ CNC	Crd/No Crd	☐ Grading Basis is Invalid	PNP P/NP
☐ GRD	Graded	☐ Grading Basis is Invalid	GRD Graded
☐ PNP	P/NP	☐ Grading Basis is Invalid	PNP P/NP
☐ SUS	Sat/Unsat	☐ Grading Basis is Invalid	PNP P/NP
☐ TRN	Transfer	☒ Grading Basis is Invalid	

Viewing grading basis mapping rules on the Grading Basis Exception Rule page (GRD_BASE_EXCEPTION)

The system uses the values on this page to determine how to map each grading basis. Because the grading basis for the requested class is *SUS* (satisfied/unsatisfied), the system maps to *PNP* (pass/no pass). Therefore, Michael's grading basis appears as *PNP* on enrollment pages.

The system maps the grading basis when you exit the Class Input field.

Special Note About the Elective Grading Basis

When a student attempts to enroll in a class outside of the student's career and the class is offered with a grade basis for which the Elective Grade Basis check box is selected, the system presents the student with the student's grading basis choice and a corresponding *grade basis convert to* value. Each of the pre-mapped choices is set up in the Grade Scheme table under the career of the class and under the elective grade basis. Because students in this cross-career enrollment situation can be exposed to grade bases that are outside of their career, it is essential that you set up remapping rules that accommodate each of the possible grade bases from which a student may choose. Insert rows to accommodate all possibilities in the grading basis for the Requested Class field on the Grading Basis Exception Rules page. You do *not* need to insert rows for grade bases that are invalid, but you can do so. In these situations, select the Grading Basis is Invalid check box. For elective grading bases, you *must* add a row for the elective basis (for example, if *OPT*, then convert to *OPT*), for individual grade bases that make up the elective (*OPT*) grading basis (for example, if *SUS*, then convert to *PNP*), and so on.

Running the Grade Basis Exception Report

Access the Grade Basis Exception page (Set Up SACR, Product Related, Student Records, Reports, Grade Basis Exception, Grade Basis Exception).

Grade Basis Exception

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PSUNV

PeopleSoft University

*As Of Date:

02/02/2002

Grade Basis Exception page

- Academic Institution

The academic institution for which you are reporting. The system populates this field. You can change the value.
- As Of Date

Enter an as of date to report on all grade basis exception rules that are active as of this date. Normally, you enter a date that is the start of the term or term enrollment period.

Creating Grade Rosters for a Single Class

Access the Grade Roster Type page (Curriculum Management, Grading, Grade Roster, Grade Roster Type).

Grade Roster Type		Grade Roster	
Course ID:	001276	Foundations of Higher Math	Offer Nbr: 1
Catalog:	MATH	100	Class Section: 1
☐ Use Blind Grading		Class Nbr: 1192	Regular Academic Session
PeopleSoft University			
2006 Fall			

	*Grade Roster Type	*Description	Approval Status	Final Roster Grading Status	Override	Partial Post	Create	Post	+	-
1	Mid-Term Grade	Mid-Term Grade	Not Reviewed		☐		Create		+	-
2	Final Grade	Final Grade	Not Reviewed	Grade Input Allowed	☒	☐	Create	Post	+	-

Grade Roster Type page

Grade Roster Type

Enter the type of grade roster that you want to generate. Grade roster type values are delivered with your system as translate values. While you should not change the *Final Grade* value, you can add as many nonfinal grade values as you want.

Description

The system provides the grade roster type description, taking it from the translate table. You can change this value.

Approval Status

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require substantial programming. Values for approval status are *Not Reviewed*, *Ready for Review*, and *Approved*.

The system does not permit you to post grade rosters that have an approval status of *Not Reviewed* or *Ready for Review* unless you select the Partial Post check box.

Note. You can save the data and make changes to the grades. After you approve and post, however, you must make any grade revisions on a student-by-student basis using one of the enrollment pages.

Final Roster Grading Status

The system populates the Final Roster Grading Status field based on the approval status for the class.

Override

Select this check box and click the Create button to delete the previous grade roster and generate a new one for the class. If you do not select this check box and just click the Create button, the system appends any new students to the existing grade roster.

Partial Post	Select to manually enter and post grades for a class section, save it, and return later to finish entering and posting grades. Note. Although you cannot approve the entire grade roster until you enter all grades, if you select the Partial Post check box, the system posts all grades that you entered to those students' records.
Posting Date	The system displays the posting date when the grade roster post process finishes.
Create	Click to create the grade roster. Go to the Grade Roster page to enter grades.
Post	Click to post the final grades to the grade roster after you enter them. The system changes the status on the Grade Roster 1 page to <i>Posted</i> . The system does not permit you to post grade rosters that have an approval status of <i>Not Reviewed</i> or <i>Ready for Review</i> unless you select the Partial Post check box.

Creating Grade Rosters for Multiple Classes

Access the Create Grade Rosters page (Curriculum Management, Grading, Create Grade Rosters).

Create Grade Rosters

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution: PSUNV PeopleSoft University

*Term: 0620 2009 Spring

Session	Class End Date From	Class End Date To	Academic Organization	*Grade Roster	*Override Existing Grade Roster	*Total
Twelve Wk	02/06/2009	03/20/2009	LIBARTS	Final Grade	No	1

Create Grade Rosters

Academic Institution	Enter the academic institution for the grade roster process. This value controls the type of data that is available in the remaining fields.
Term	Enter the term for the grade roster. Term values are defined on the Term Table page.
Session	Enter the session for the grade roster. The session value is optional. Use it to limit your roster production to a single session within the specified term. Session values are defined on the Session Table page.

Class End Date From and Class End Date To	Select the class end date from and to dates. The system selects rosters to create for classes with an end date that is greater than or equal to the value in the Class End Date From field and less than or equal to the value in the Class End Date To field. Both fields are optional and one may be entered without the other.
Academic Organization and Subject Area	Enter the academic organization or subject area for which to produce the rosters. You can enter the academic organization or subject area, but not both. If you enter an academic organization, the Subject Area field is unavailable for entry. Conversely, if you enter a subject area, the Academic Organization field is unavailable for entry. Academic organization values are defined on the Academic Organization Table page. Subject area values are defined on the Academic Subject Table page.
Grade Roster	Enter the type of grade roster that you want to generate. Grade roster values are delivered with your system as translate values. While you should not change the <i>Final Grade</i> value, you can add as many nonfinal grade values as you want.
Override Existing Grade Roster	Available values are: <i>Yes</i>: Enter to delete and override any preexisting grade rosters when you run the Create Grade Roster process, regardless of whether you selected the Override Grade Roster check box on the Grade Roster Type page. <i>No</i>: Enter to retain all prior grade rosters when you run the Create Grade Roster process, regardless of whether you selected the Override Grade Roster check box on the Grade Roster Type page. The system produces rosters only for those classes for which rosters have not yet been generated and appends any currently enrolled students who are not on the original roster.
Total	If you selected a grade roster type of <i>MidTerm</i> , this field becomes available. The system enables you to create as many rosters as you need for each class, as long as it is not a <i>Final Grade</i> roster type. Enter the total number of non-final grade rosters that are needed for each class in the Total field.

Run the PSJob SRPCGPR. Results of the Create Grade Rosters process appear on the Grade Roster page.

Chapter 13

Setting Up Degrees and Honors

This chapter discusses how to set up degrees and honors.

See Also

[Chapter 44, "Graduating Students," page 1071](#)

Setting Up Degrees and Degree Honors

To set up degrees and degree honors, use the Degree Table component (SA_DEGREE_TABLE) and the Degree Honors Table component (DEGREE_HONORS_TBL).

The process of graduating students requires you to set up degrees and degree honors, to update student program records, and, if necessary, to report and audit degree changes. This section discusses the first of these requirements in detail. You should also familiarize yourself with the PeopleSoft Academic Advisement application, an important and automated precursor to approving students for graduation.

This section discusses how to:

- Define degrees.
- Attach degrees to academic plans.
- Define degree honors.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Producing Academic Advisement Transcript Reports"

Pages Used to Set Up Degrees and Honors

Page Name	Definition Name	Navigation	Usage
Degree Table	SA_DEGREE_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Degree Table, Degree Table	Define both internal and external degrees for PeopleSoft Recruiting and Admissions and Student Records.

Page Name	Definition Name	Navigation	Usage
Academic Plan Table	ACADEMIC_PLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Academic Plan Table	Define a degree for each academic plan.
Degree Honors Table	DEGREE_HONORS_TBL	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Degree Honors Table, Degree Honors Table	Define degree honors for your institution. Example degree honors might be <i>with Distinction</i>, <i>Highest Honors in</i>, and <i>Summa Cum Laude</i>. Student Records shares this page with Recruiting and Admissions because admissions staff may need to track external degree honors of applicants.

Defining Degrees

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

Degree Table

Degree:BA

Find | View AllFirst1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:

Bachelor of Arts

Short Description:

B.A.

Formal Description:

Bachelor of Arts

☒ Internal Degree

Years Of Education:

Education Level:

Previous Degree Type:

NZVCC Qualificatn Degree Code:

*Prospectus Code:

Qualification Award Category:

20

Bachelors

☒ Report to MoE - SDR

Degree Table page

Status	Select a status for this degree. Select <i>Active</i> when the degree is valid for your institution. You can keep all degrees in the database for historical purposes by setting any degrees that you no longer award to <i>Inactive</i> .
Description,Short Description,andFormal Description	Enter descriptions of the degree. Later, you can identify which description appears on the transcript.
Internal Degree	Select to indicate that the degree is internal to your institution and that it does not represent a degree from another organization.
Years of Education	No programming is tied to this field; use it for informational purposes only.
Educational Level	No programming is tied to this field; use it for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these values.

(NZL) NZVCC Qualification Degree Code (New Zealand Vice Chancellors Committee qualification degree code)

Enter the NZVCC qualification code for this degree. The system uses this value when generating the Graduate Destinations Survey report.

This field is available only when you select the NSI and SDR Personal Data, SDR Degree check box on the SA Features page on the Installation table.

(NZL) Prospectus Code

Enter the Ministry of Education (MoE) identifier. The system uses this value when generating the Qualification Completion file.

This field is available only when you select the NSI and SDR Personal Data, SDR Degree check box on the SA Features page on the Installation table.

(NZL) Qualification Award Category

(Optional) No programming is tied to this field; use it for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these values.

This field is available only when you select the NSI and SDR Personal Data, SDR Degree check box on the SA Features page on the Installation table.

(NZL) Report to MoE - SDR (report to Ministry of Education - Single Data Return)

Select to include students awarded this degree in the Qualification Completions file.

This field is available only when you select the NSI and SDR Personal Data, SDR Degree check box on the SA Features page on the Installation table.

See Also

[Chapter 53, "\(NZL\) Generating Government Reports," Processing SDR Extracts, page 1387](#)

Attaching Degrees to Academic Plans

Access the Academic Plan Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Academic Plan Table).

A student who is active in a program with more than one plan can potentially receive more than one degree when you set the student's degree checkout status to *Approved* and click the Update Degrees button on the Student Degrees page. Conversely, if a student has multiple plans under one program, and each of those plans is associated with the *same* degree, then the student receives only one degree when you set the degree checkout status to *Approved* and click the Update Degrees button on the Student Degrees page.

This is important to consider when you are setting up degrees for plans that are linked to the same program and in which students may have two or more of such plans under a single program at a given time. This is also important to consider when setting up double majors. For example, if you have a particular double major combination, for which you want only one degree, you may want to create two separate plans to represent each major but tie the double major degree to only one of the plans. Or you may want to create one plan that represents the double major. For students who attempt a degree with only one of these two majors, you would assign a different plan to them, with a slightly different degree. For example, instead of a bachelor of science degree in architecture and engineering, you might also create a degree that is a bachelor of arts in architecture, a degree that is a bachelor of science in architecture, and yet another degree that is a bachelor of science in engineering. Of course, you must also consider the effect that plan assignment has on your academic advisement setup and the way that you define plan- or program-based requirements.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Plans

Defining Degree Honors

Access the Degree Honors Table page (Set Up SACR, Product Related, Student Records, Student Standing and Awards, Degree Honors Table, Degree Honors Table).

Note. The Degree Honors Table page differs from the Honors/Awards Table page in that it relates to only internal degrees, plans, and subplans.

Honor Type	The type of honor and where it appears on the transcript. For example, an honors type of <i>Degree Plan Suffix</i> indicates that the honor appears on the transcript <i>after</i> the degree plan. Honor type choices are <i>Degree Prefix</i> , <i>Degree Suffix</i> , <i>Degree Honors</i> , <i>Degree Plan Prefix</i> , <i>Degree Plan Suffix</i> , <i>Degree Sub-Plan Prefix</i> , and <i>Degree Sub-Plan Suffix</i> . Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Status	Select a status for the degree honor. Select <i>Active</i> when adding a new degree honor. Select <i>Inactive</i> only if your institution will no longer use this degree honor.
Formal Description	You can set up your transcript type so that the formal description prints on the diploma and transcript.
Print on Diploma	No programming is tied to this field; use for informational purposes only.
Print on Transcript	Select this check box to display the formal description of the degree honor on the transcript.

Chapter 14

Setting Up Transcripts

The PeopleSoft Transcript feature enables you to define multiple types of transcripts, at varying levels of security, formality, appearance and function. This chapter provides an overview of transcript levels and discusses how to:

- Define transcript type security.
- Create transcript notes.
- Create transcript text.
- Review transcript print areas.
- Define transcript types.
- Set up electronic transcript processing.

See Also

Chapter 45, "Producing Transcripts," page 1111

Understanding Transcript Levels

On various pages throughout your Student Administration system, you are prompted to select the transcript level for which you want to print information. The transcript level you select determines the type of transcript on which the information appears. Transcript levels are hierarchically based on the two-digit numeric code in the value column of the translate table for the field TRANSCRIPT_LEVEL. The following table lists the transcript levels and their values in the translate table, and describes each one.

Note. Information in the table about the Advising Report applies only if you set up for COBOL based transcripts, using the Transcript Type component (TSCRPT_TYPE).

<i>Transcript Level</i>	<i>Value</i>	<i>Description</i>
Not Print	00	Do not print the information on any transcript.

<i>Transcript Level</i>	<i>Value</i>	<i>Description</i>
Official	20	Print the information on the official transcript, the unofficial transcript, and the student life transcript. Includes all information that is flagged throughout the system as Official, Unofficial, Student Life, and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check box.
Unofficial	40	Print the information on the unofficial transcript and the student life transcript. Includes all information that is flagged throughout the system as Unofficial, Student Life, and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check box.
Stdnt Life (student life)	60	Print the information on the student life transcript. Includes all information that is flagged throughout the system as Student Life and Degree Progress. Can include an Advising Report if you select the Advising Report or Special Advising Report check box.
Degr Prog (degree progress)	80	Print the information on the degree progress transcript, which can include academic advisement information in addition to a transcript. Does not include a transcript. Includes an Advising Report only if you select the Advising Report or Special Advising Report check box. The advising report is ordered and evaluated for each student by career.

When you generate transcripts, the system includes the applicable information for all transcripts types with a value on the translate table greater than or equal to the transcript level you select. For example, if you select Official, the system includes the applicable information on all transcript types. However, if you select Stdnt Life, the system only includes the applicable information on student life transcripts and degree progress transcripts.

Transcript level values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Defining Transcript Type Security

You can assign different levels of transcript type security to each user in your organization. Transcript type security authorizes users who have access to the transcript request pages to create transcript requests only for those transcript types for which they have security.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Student Records," Setting Security for Transcript Types

Creating Transcript Notes

To set up transcript notes, use the Transcript Notes Table component (TSCRPT_NOTES_TBL).

Use the Transcript Notes Table page to define transcript notes that can appear alongside a particular student enrollment record. Transcript notes only print on a student's transcript when you both attach the predefined note to an individual student's enrollment record and process a transcript type for which the Print Transcript Note check box is selected. Typically, transcript notes are generic enough that they can be reused for multiple students' enrollment records. You can attach notes to a student's enrollment record using either the Transcript Note link on the Enrollment Request page or the Transcript Note fields on the Student Enrollment 3 page.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Understanding Class Enrollment Processing, page 747](#)

Page Used to Create Transcript Notes

Page Name	Definition Name	Navigation	Usage
Transcript Notes Table	TSCRPT_NOTES_TBL	Set Up SACR, Product Related, Student Records, Transcript, Transcript Notes Table, Transcript Notes Table	Define transcript notes.

Defining Transcript Notes

Access the Transcript Notes Table page (Set Up SACR, Product Related, Student Records, Transcript, Transcript Notes Table, Transcript Notes Table).

Transcript Notes Table

Find | View All

First1 of 1Last

SetID:PSUNV

Note ID:IREM

*Effective Date:01/01/1900

*Status:Active

*Description:Incomplete Removed

Short Description:Inc Remove

Transcript Note Sequence Nbr	Transcript Note
1	Grade of "" removed from students' record.

Transcript Notes Table page

- Effective Date

Enter an effective date for this transcript note. The effective date defines when the status you select is valid.
- Status

Select a status for this transcript note. Select *Active* when adding a new transcript note. The *Inactive* option should only be used if your institution will no longer use this transcript note.
- Description

The description is used for system related display purposes only. The description does not appear in the transcript.
- Short Description

The short description is used for system-related display purposes only. The short description does not appear in the transcript.
- Transcript Note Sequence Nbr (transcript note sequence number)

The transcript note sequence number enables you to create multiple note lines under one note ID. When you select a transcript note to appear on a transcript, all notes under the note ID appear.
- Transcript Note

Enter the transcript note in the free-form text field. This text appears on the student's transcript when you both attach the note to a student's enrollment record and process a transcript type for which the Print Transcript Note check box is selected.

Creating Transcript Text

Use the Transcript Text page to define transcript text for a specific student. Unlike transcript notes, which are predefined and attached to students on the enrollment request pages, transcript text is created for a specific student and is not necessarily associated with a specific enrollment record. After you create transcript text for a student, it always appears on transcripts with the transcript type you specify, or on a transcript that is at or above the transcript level you specify. No options at the transcript type setup level enable you to inactivate or hide transcript text. You can limit when and how the transcript text appears by using the filtering options on the Transcript Text page to specify valid transcript types, levels, and relative positions for the transcript text.

Page Used to Create Transcript Text

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transcript Text	TRANSCRIPT_TEXT	Records and Enrollment, Transcripts, Transcript Text, Transcript Text	Define transcript text for a specific student.

Defining Transcript Text

Access the Transcript Text page (Records and Enrollment, Transcripts, Transcript Text, Transcript Text).

Transcript Text

Kimberly Adams AA0001

Find | View All First 1 of 1 Last

Academic Career: UGRD Undergraduate

Find | View All First 1 of 1 Last

*Print Loc Seq: 1 *Relative Position: After *Print Location: Transfer Credit - Cou + -

*Institution: PSUNV PeopleSoft University

Model Nbr: 1

Find | View All First 1 of 1 Last

*Text Seq Nbr: 1 Transcript Level: Unofficial Transcript Type: ADVIP + -

Flexible Transcript Type: TEST1

Transcript Text: Excess credits from SMCC consolidated into one course, General Education Excess.

Transcript Text page

Print Loc Seq (print location sequence)

Enter the print location sequence to identify the order in which notes appear within a print location. The default is 1, and each additional row increases by one.

Relative Position

Select the relative position of the note within the chosen print location. You are prompted from the translate table. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Values include:

After: Select this value if you want the transcript text to appear immediately after the specified print location sequence. In the previous example, the text "Excess credits from SMCC consolidated into one course, General Education Excess" would appear immediately after the Transfer Credit - Courses section on the transcript type of *ALLOF*.

Before: Select this value if you want the transcript text to appear immediately before the specified print location sequence.

Print Location

Enter the print location of the text. Print location values are delivered with your system and you can view them on the Print Area Table page.

Modifying these values requires programming effort. The system uses this value in conjunction with the relative position value to determine where to print the transcript text. If the Transcript Type or Transcript Level that you specify is associated with a transcript type that has the Print Location set to *Do Not Display*, then the transcript text does not appear on the transcript.

The transcript type setup is the overriding rule. Print Location values are: *Academic Program, Academic Standing, Cumulative Stats, Degrees - External, Degrees - Local, Enrollment, Milestones, Student Personal Data, Term Honors, Term Statistics, Transcript Print Date, Transcript Recipient, Transcript Request Reason, Transcript Requester, Transfer Credit - Courses, Transfer Credit - Others, Transfer Credit - Tests, and Withdrawal Info.*

Note. Transcript text associated with a print location of *Academic Program* appears on the transcript only if the associated transcript type is configured such that the academic program prints in the Transcript Header. To review a particular transcript type's setup data, access the Transcript Type - Program page.

Note. Transcript text associated with a print location of *Institution Data* appears differently on transcripts printed through Crystal than it does on transcripts you view online. Transcripts printed through Crystal always display institution data in a reserved area in the header of the transcript (upper left corner). This reserved area has a limited number of lines of text. For this reason, we have inactivated the *Institution Data* value. Any transcript text created with a print location of *Institution Data* prior to PeopleSoft Student Administration 8 remains in the database, and print as always. However, no new entries with a print location of *Institution Data* can be made. To review the setup data for a particular transcript type, access the Transcript Type - General page.

Note. Transcript text associated with a print location of *Student Personal Data* does not appear as expected for transcript types for which student personal data is set to print in the page header. This is because the page header has a limited number of text lines available for printing. Therefore, transcript text associated with student personal data and a transcript type with student personal data printing in the page header, will instead print the transcript text in the first lines of text in the body of the transcript. To review the setup data for a particular transcript type, access the Transcript Type - General page.

Note. Transcript text for all types of *Transfer Credit* must be associated with a transfer model. Because the model can be applied to multiple articulation terms, the effect on printing associated with transcript text is significant. Therefore, transcript text associated with a transfer credit model can be printed successfully only when the transfer credit is configured to print in the transcript header or transcript trailer. Transfer credit that is configured to print in the enrollment detail or enrollment trailer does not display any associated transcript text. To review the setup data for a particular transcript type, access the Transcript Type - Transfer/Test/Other Credits page.

Institution	Enter the institution for which you want to create the transcript text. The institution value determines which transcript types are available in the Transcript Type field.
Model Nbr (model number)	Based on the print location you select, the system prompts you for additional information. For instance, if you select a print location of <i>Transfer Credit - Courses</i> , the Model Number field appears. If you select a print location of <i>Milestones</i> , the Milestone Number field appears, and so on.
Text Seq Nbr (text sequence number)	The system populates the text sequence number to 1 by default. You can insert text rows and increase the text sequence number. The sequence number determines the order of printing on the student's transcript before or after a print location.
Transcript Level	Select either a transcript level or a transcript type, but not both. Select a transcript level to determine the types of transcripts on which the system will include this transcript text. Depending on the transcript level you select, the system prints the transcript text on transcript types set to the same level, and all other greater numbered transcript types on the translate table. For example, if you select <i>Official</i> for your transcript level (which has a level value of 20 in the translate table), the system prints the transcript text on all transcript types that have transcript levels of 20 to 80. However, if you select <i>Stdnt Life</i> for your transcript level (which has a level value of 60 in the translate table), the system prints the transcript text only on those transcript types where the transcript level is set to <i>Stdnt Life</i> or <i>Degr Prog</i> (degree progress), levels 60 - 80. The only exception to this rule is <i>Not Print</i>. If you select <i>Not Print</i>, the transcript text never prints.
Transcript Type	Select a transcript level or a transcript type. Enter a transcript type if you want the text to appear only on the type you specify.
Flexible Transcript Type	Select a flexible transcript type, which are dynamically created transcripts.
Transcript Text	Enter your free-form text in the Transcript Text field. This text appears on the student's transcript.

Note. If you use the Historical Course Enrollment page for conversion purposes, and want to display term statistics for those enrollments, use transcript text for those statistics. Otherwise, display summary statistics that you converted using the transfer credit process.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Preparing for Data Conversion," Converting Student Records Data.

Reviewing Transcript Print Areas

To set up transcript print areas, use the Transcript Print Area Table component (TSCRPT_PRT_AREA).

Transcript print areas are associated with codes that define areas of the transcript on which various types of transcript data appear. Print area values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Page Used to Review Transcript Print Areas

Page Name	Definition Name	Navigation	Usage
Transcript Print Area Table	PRINT_AREA_TABLE	Set Up SACR, Product Related, Student Records, Transcript, Transcript Print Area Table, Transcript Print Area Table	Review delivered transcript print areas.

Reviewing the Transcript Print Area Table

Access the Transcript Print Area Table page (Set Up SACR, Product Related, Student Records, Transcript, Transcript Print Area Table, Transcript Print Area Table).

Transcript Print Area Table						
*Print Area Code	Sort Print Area	Secondary Print Area	*Description	Short Desc		
ED	5	3	Enrollment Detail	Enrol Dtl	+	-
EH	5	1	Enrollment Header	Enrol Hdr	+	-
ET	5	5	Enrollment Trailer	Enrol Trl	+	-
ND	ND		Do Not Display	No Display	+	-
PH	1		Page Header	Page Hdr	+	-
TH	3		Transcript Header	Tscrpt Hdr	+	-
TT	9		Transcript Trailer	Tscrpt Trl	+	-

Transcript Print Area Table page

Print Area Code	An acronym that defines the transcript print area.
Sort Print Area, Secondary Print Area	The values in these fields determine how the system sorts the print areas on the transcript.
Description	Text used on the Transcript Type component to determine print detail.
Short Desc (short description)	Value used internally by system processes. Not visible on any pages.

Note. The values on the Transcript Print Area Table page are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Defining Transcript Types

To set up transcript types, use the Define Transcript Type component (SSR_TSCRPT_TYPE).

This component enables you to define various types of transcripts for your institution, each type with its own unique purpose, design, and formality level.

Note. The pages of the Transcript Type component (TSCRPT_TYPE) still exist in the system: TSCRPT_TYPE, TSCRPT_CARS, TSCRPT_TYPE_GEN, TSCRPT_TYPE_LOCDGR, TSCRPT_TYPE_ENRL, TSCRPT_TYPE_TRNSFR, and TSCRPT_TYPE_SORT.

Use this component to set up for COBOL based transcripts.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Producing Academic Advisement Transcript Reports"

Prerequisites

Before you can create transcript types, you must create academic careers. In addition, if you want to create an academic advisement report that references a special requirement usage (one other than standard), you must create requirement usage values.

Pages Used to Define Transcript Types

Page Name	Definition Name	Navigation	Usage
Define Transcript Type - Basic Data	SSR_TSCRPT_TYPE	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Basic Data	Define transcript types, associate service indicators, specify transcript levels, define self-service availability. Typical transcript types include official, unofficial, graduate, undergraduate, NCAA, and continuing education.
Define Transcript Type - Careers	SSR_TSCRPT_CARS	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Careers	For transcript types with a Detail Organization value of <i>by Career</i> , define all possible careers that this transcript type can report. When you run the transcript request process for this transcript type, the system generates transcripts. Transcripts are processed for each career specified, that matches a career of the student.
Define Transcript Type - General	SSR_TSTYPE_GEN	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, General	Define the print areas and details about appearance for types of information such as institution, student, print date, and reason.
Define Transcript Type - Degrees/Program	SSR_TSTYPE_LOCDGR	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Degrees/Program	Define the print areas and details about appearance for academic program related elements.
Define Transcript Type - Enrollment/Statistics	SSR_TSTYPE_ENRL	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Enrollment/Statistics	Define the print areas and details about appearance for enrollment information.
Define Transcript Type - Transfer/Test/Other Credits	SSR_TSTYPE_TRNSFR	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Transfer/Test/Other Credits	Define the print areas and details about appearance for transfer, test, and other credits.

Page Name	Definition Name	Navigation	Usage
Define Transcript Type - Test Scores	SSR_TSTYPE_TEST	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Test Scores	Define the print areas and details about appearance for test scores.
Define Transcript Type - Special GPA	SSR_TSTYPE_SGPA	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Special GPA	Define the print areas and details about appearance of Special GPAs.
Define Transcript Type - View Sort	SSR_TSTYPE_SORT	Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, View Sort	Display the sorting order for how the transcript type information appears.

Defining Transcript Type Basic Data

Access the Define Transcript Type - Basic Data page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Basic Data).

Define Transcript Type - Basic Data page

Enter an Academic Institution and an alphanumeric Transcript Type code (one to five characters in length).

You should not define a Transcript Type of *ALL* because this value is used on the Transcript Type Security page to grant users access to all transcript types.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Student Records," Setting Security for Transcript Types.

Effective Date Enter the effective date that determines when this transcript type is available on the batch and online transcript request pages.

Description Enter a description. This information does not appear on the transcript. It is for related display purposes.

Formal Description Enter a formal description. This information appears at the beginning of the transcript.

Transcript Level

Enter the transcript level that you want to associate with this transcript type. Transcript level is hierarchical and based on the two-position numeric code in the value column of the translate table. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires substantial programming effort.

See [Chapter 14, "Setting Up Transcripts," Understanding Transcript Levels, page 311.](#)

Detail Organization

Select how the system sorts information on the transcript. Values are:

by Career: Select this value to sort information by the student's academic career, and then by term. For instance, if the student has an undergraduate and graduate record, the system first displays all of the academic career information that matches one academic career, and then all of the academic career information that matches the other career. Within each academic career grouping, information is ordered by term. The system determines the order in which academic career records appear on the transcript by referencing the sequence number of each academic career on the Careers page. Those academic careers with the lowest sequence numbers print first, and so on. The system only seeks and evaluates the academic careers on the Careers page that match the student. Be sure to enter all possible academic careers that you want to capture and report with this transcript type.

Chrono: Select this value to sort information chronologically. For example, all academic careers in which the student has been active (that are also listed on the Careers page) print in chronological order, by term.

Note. If you set up for COBOL based transcripts, using the Transcript Type component (TSCRPT_TYPE), the *Chrono* setting is *not* intended for use with the advising check boxes. Advising reports *always* print by academic career.

Term Activated Careers Only

Select this check box to exclude career data from printing on the transcript for which a student has no academic history, such as those careers added to students for prospect records.

The following warning applies if you set up for COBOL based transcripts, using the Transcript Type component (TSCRPT_TYPE):

Warning! If your institution produces Academic Advisement reports for students who are not term-activated (for example, for prospective transfer students), this check box should be cleared for the transcript types associated with these report types.

Allow XML Output File

Use this check box to create your own XML file for testing.

If you select the Allow XML Output File check box, the Output XML File and Output File Path fields appear on the Process Transcripts page when you select a value of *Generate and Print Transcript*, *Print Transcript*, or *Request, Generate and Print* in the Process Action field on that page.

Report Definition ID and Template ID	Select the template to be used with this transcript type. First, select the Report Definition ID then one of the Template IDs associated with that Report Definition. If these fields are left blank, the default template from the Report Definition of SSR_TSRPT will be used. The transcript type defined report definition and template can be overridden on the Process Transcripts component. If not overridden, the process will use the report definition and template ID as defined on the transcript type.
FERPA Information	The message that you define in this field prints in the header of the transcript when the FERPA check box is selected for a student on the FERPA page (Campus Community, Personal Information (Student), Biographical (Student), Student FERPA, FERPA). If the field is left blank, nothing prints on the transcript for FERPA.
Check Service Indicators	Select this check box to have the transcript process identify indicators (holds or positive services) that you specify in the Service Impacts fields.
Service Impacts	Select the service impacts that the system evaluates in the transcript process. If the system finds on a student's record a service indicator with any one of the up to three service impacts you list, the system does not generate a transcript for the student. Instead, the system generates an error message in the transcript output. Service impact values are defined on the Service Impact Table page.
Allow Student Self-Service	If you select this check box and the transcript level is <i>Official</i>, the system generates a request for this transcript type on the Request Official Transcript self-service page. Select this check box for only one transcript type per institution. If you select this check box and the transcript level is <i>Unofficial</i>, the system displays this transcript type on the Unofficial Transcript self-service page. You can select this check box for multiple transcript types. If you select this check box and the transcript level is <i>Degree Progress</i>, the system displays this transcript type on the View Degree Progress Report self-service page, and the Evaluate Transfer Credit - Process a Degree Progress Report page. You can select this check box for multiple transcript types.
Allow Advisor Self-Service	If you select this check box and the transcript level is <i>Unofficial</i>, the system displays this transcript type on the View Advisee Information self-service page (unofficial transcript). You can select this check box for multiple transcript types. If you select this check box and the transcript level is <i>Degree Progress</i>, the system displays this transcript type on the View Advisee Information self-service page (degree progress report). You can select this check box for multiple transcript types. This check box does not have any use with a transcript level of <i>Not Print</i> and <i>Stdnt Life</i> (student life).
Information for Students	This free-form text appears to students for the respective transcript type on the View Degree Progress Report self-service page.

Linking Academic Careers to Transcript Types

Access the Define Transcript Type - Careers page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Careers).

Basic Data			Careers	General	Degrees/Program	Enrollment/Statistics	Transfer/Test/Other Credits
Find View All First 1 of 1 Last							
Academic Institution:	PSUNV	PeopleSoft University					
Transcript Type:	ALLOF	Official Transcripts - All					
Effective Date:	07/19/1997						
Career			Find View All First 1-2 of 7 Last				
*Seq Nbr:	1						
*Academic Career:	Continuing Education						
Formal Description:	Official Transcripts						
*Seq Nbr:	2						
*Academic Career:	Graduate Business						
Formal Description:	Official Transcripts						

Define Transcript Type - Careers page

Note. If the Detail Organization field on the Basic Data page is set to *Chrono*, no fields appear on the Careers page. All student information, regardless of career, prints chronologically by term.

Seq Nbr (sequence number)

The system populates this field for the first row with a value of 1 and increments each additional row by one. Sequence number indicates a unique row of information and the order in which academic career information appears on the transcript. For example, if a student is active in two academic careers (Undergraduate and Graduate), the transcript type setup such as that shown in the exhibit would produce a transcript where the student's Undergraduate (Seq Nbr 1) transcript or degree audit appears first, then a section break, then the student's Graduate (Seq Nbr 2) transcript or degree audit appears. The order in which a student becomes active in a career has no effect on transcript print order. Career print order is always specified by the transcript type sequence.

Academic Career

Enter all possible careers that this transcript type can report. Use multiple rows as necessary. When you run the transcript request process for this transcript type, the system generates individual enrollment detail or degree audits for each career in which the evaluated student is active. For example, if you have ten careers specified for a single transcript type, and you run the transcript type for a student who has one career that matches one of the careers specified, and another career which does not match, only enrollment detail associated with the matching career appears. The other non-matching career's enrollment detail or degree audit information does not appear. Academic career values are set up as translate values and are defined on the Academic Career Table page.

Formal Description

The system populates the formal description by default. You can change this value. This description appears on the transcript.

If you set up for COBOL based transcripts, using the Transcript Type component (TSCRPT_TYPE): Advising reports are processed for each career in which the student has a current program action of *activate*, *data change*, *plan change*, *program change*, or *readmit*. A transcript type can have multiple academic careers linked to it.

Designating Student and Institutional Information

Access the Define Transcript Type - General page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, General).

General		Degrees/Program	Enrollment/Statistics	Transfer/Test/Other Credits	Test Scores	Special GPA
Find View All First 1 of 2 Last						
Academic Institution:	PSUNV PeopleSoft University					
Transcript Type:	ALLOF Official Transcripts - All					
Effective Date:	07/19/1997					
Institution Data						
'Print Area:	Page Header		☐ Print Institution Address			
Print Seq:	10		☒ Print Institution ID			
		Institution ID: 123456				
Student Personal Data						
Name Usage	NAME USG 5 Oth, Ftr, Deg, Pri, Mdn, Mtr					
'Print Area:	Page Header		Print Seq:		30	
		☐ Print Student SSN		☐ Print Student Sex		
		☐ Print Student Birthday		☐ Print Campus ID		
		☒ Print Student Address				
		Address Usage		SLCT ORD 1 Home, Mailing, Permanent, Work		
		☐ Print Student Phone				
Print Date						
'Print Area:	Page Header		Print Seq:		20	
Requester						
'Print Area:	Do Not Display					
Reason						
'Print Area:	Do Not Display					
Recipient						
'Print Area:	Do Not Display					
Basis of Admission						
'Print Area:	Do Not Display					

Define Transcript Type - General page

Note. Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort.

Institution Data Print Area Select the print area in order to indicate where the system displays academic institution data. Values are *Do Not Display*, *Transcript Header*, and *Page Header*.

Institution Data Print Seq (institution data print sequence) The system populates the print sequence by default. The print sequence determines the order in which institution data information appears within the print area. You can change the value. In the example, both student and institution data prints in the page header area. However, the institution data prints first and the student data second because of the print sequence numbers.

Print Institution Address	Displays the institution address in the area specified.
Print Institution ID	Displays the institution ID in the area specified.
Student Personal Data Name Usage	Specify the logic that the system uses to select the name printed on the transcript.
Student Personal Data Print Area	Select the print area in order to indicate where the system displays student personal data. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> .
Student Personal Data Print Seq (student personal data print sequence)	The print sequence determines the order in which student personal data appears within the print area. The system populates the print sequence by default. You can change the value.
Print Student SSN (print student social security number)	Displays the student's social security number in the area specified.
Print Student Birthday	Displays the student's date of birth in the area specified.
Print Student Address	Displays the student's address that corresponds with the setting in the Home Address Type field on the Names/Addresses Page.
Address Usage	Specify the logic that the system uses to select the address printed on the transcript.
Print Student Sex	Displays the student's gender in the area specified.
Print Campus ID	Displays the student's campus ID in the area specified.
Print Date Print Area	The date on which the transcript is generated (and not necessarily printed). Select the print area in order to indicate where the system displays print date information. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> .
Print Date Print Seq (print date print sequence)	The print sequence determines the order in which print date information appears within the print area. The system populates the print sequence by default. You can change the value.
Requester Print Area	The last name, first name of the user who created the transcript request. Select the print area to indicate where the system displays requester information. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> .
Requester Print Seq (requester print sequence)	The print sequence determines the order in which requester information appears within the print area. The system populates the print sequence by default. You can change the value.

Reason Print Area	The reason for the transcript request as specified in the Request Reason field on the Request Header page. Select the print area to indicate where the system displays request reason information. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> .
Reason Print Seq (reason print sequence)	The print sequence determines the order in which request reason information appears within the print area. The system populates the print sequence by default. You can change the value.
Recipient Print Area	Recipient is the name of the institution, department, or individual that receives the transcript. You must enter send to information during the transcript request process in order to specify this. Select the print area to indicate where the system displays recipient name information. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> .
Recipient Print Seq (recipient print sequence)	The print sequence determines the order in which recipient information appears within the print area. The system populates the print sequence by default. You can change the value.
Basis of Admission Print Area	Select the print area to indicate where the system displays basis of admission information. Values are <i>Do Not Display</i> , <i>Transcript Header</i> , and <i>Page Header</i> . If you select <i>Transcript Header</i> or <i>Page Header</i> , the system displays basis of admission information for students who have the Include in Transcript check box selected on the Basis of Admission page.
Basis of Admission Print Seq (basis of admission print sequence)	The print sequence determines the order in which basis of admission information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Degree and Program Data

Access the Define Transcript Type - Degrees/Program page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Degrees/Program).

Basic Data	Careers	General	Degrees/Program	Enrollment/Statistics	Transfer/Test/Other Credits
Find View All First 1 of 1 Last					
Academic Institution: PSUNV PeopleSoft University					
Transcript Type: ALLOF Official Transcripts - All					
Effective Date: 07/19/1997					
Academic Program					
*Print Area:		Transcript Header	☒ Print Plans with Program ☐ Print Subplans		
Print Seq:		90			
What to Print		Program Status to Include			
☐ Active Program for Term ☐ All Plan Changes ☒ Changes in Program Status		☒ Active ☐ Discontnd ☐ Admitted ☐ Waitlisted ☒ Completed ☐ Suspended ☐ Applicant ☐ Prematric ☒ LOA ☐ Dismissed ☐ Cancelled ☐ Deceased			
Local Degrees					
*Print Area:		Enrollment Header	☒ Print Degree GPA ☒ Print Degree Rank ☒ Print Degree Honors ☒ Print Degree Plan GPA ☒ Print Degree Plan Rank ☒ Print Degree Sub-Plan		
Print Seq:		10			
Other Institutions Attended					
*Print Area:		Transcript Header	Print Seq:		30

Define Transcript Type - Degrees/Program page (1 of 2)

External Degrees	
*Print Area:	Transcript Header
☒ Print Honors	
Print Seq:	70
Milestones	
*Print Area:	Transcript Trailer
☐ Sort Milestones by Program	
Print Seq:	10
Scholarships and Grants	
*Print Area:	Do Not Display

Define Transcript Type - Degrees/Program page (2 of 2)

Academic Program Print Area

Select the print area to indicate where the system displays academic program information. Values are *Enrollment Header*, *Enrollment Trailer*, *Transcript Header*, and *Do Not Display*. Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort. Depending on which print area you select, the system selects an option in the What to Print group box.

Academic Program Print Seq	The print sequence determines the order in which academic program information appears within the print area. The system populates the print sequence by default. You can change the value.
Print Plans with Program	Select this check box to display all the academic plans associated with each of the student's reported programs.
Print Subplans	Select this check box to display all the subplans associated with each of the student's reported programs.
What to Print	The system selects a What to Print option and a Program Status to Include check box based on your choice of academic program print area. You cannot override these defaults. If you select <i>Enrollment Header</i>, the system selects the Active Program for Term option and the value of <i>Active</i> for the Program Status to Include field. If you select <i>Enrollment Trailer</i>, the system selects the Changes in Program Status option and the appropriate academic program status values become available for selection in the Program Status to Include group box. Select the appropriate academic program status values. If you select <i>Transcript Header</i>, the What to Print group box becomes available for entry, and you can select which information to print. In addition, the Program Status to Include group box becomes available for entry. Select the appropriate academic program status values.
Program Status to Include	Select the appropriate check boxes to indicate the program statuses that the system includes. Values are <i>Active</i> , <i>Discontnd</i> (discontinued), <i>Admitted</i> , <i>Waitlisted</i> , <i>Completed</i> , <i>Suspended</i> , <i>Applicant</i> , <i>Prematric</i> , <i>LOA</i> (leave of absence), <i>Dismissed</i> , <i>Cancelled</i> , and <i>Deceased</i> .
Local Degree Print Area	Local degrees are degrees that a student obtains at your institution. Select the print area to indicate where the system displays local degree information. Values are <i>Enrollment Header</i>, <i>Enrollment Trailer</i>, <i>Transcript Header</i>, <i>Transcript Trailer</i>, and <i>Do Not Display</i>. Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort. Note. If you configure Local Degrees to print on the transcript, the system displays all degrees for the student across all of the student's careers, regardless of whether or not the degrees were earned in association with the specific career for which the transcript is reporting.
Local Degree Print Seq	The print sequence determines the order in which local degree information appears within the print area. The system populates the print sequence by default. You can change the value.

Other Institution Attended Print Area	The system extracts information for other institutions attended from the student's education component. Select the print area to indicate where the system displays other institutions attended. Values are <i>Transcript Header</i> , <i>Transcript Trailer</i> and <i>Do Not Display</i> . Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort.
Other Institution Attended Print Seq	The print sequence determines the order in which other institution attended information appears within the print area. The system populates the print sequence by default. You can change the value.
External Degree Print Area	The system extracts external degree information from the student's education component. Select the print area to indicate where the system displays external degree information. Values are <i>Transcript Header</i> , <i>Transcript Trailer</i> , and <i>Do Not Display</i> . Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort.
External Degree Print Seq	The print sequence determines the order in which external degree information appears within the print area. The system populates the print sequence by default. You can change the value.
Print Honors	Select this check box to display honors that the student received from other institutions.
Milestones Print Area	Select the print area in order to indicate where the system displays milestone information. Values are <i>Do Not Display</i> and <i>Transcript Trailer</i> . Print area values are delivered with your system on the print area Table page. Any modification to these values requires programming effort.
Milestones Print Seq	The print sequence determines the order in which milestone information appears within the print area. The system populates the print sequence by default. You can change the value. <u>See Chapter 11, "Preparing to Track Student Data," Setting Up Milestones, page 278.</u>
Print Honors	Select this check box to display any student honors on the transcript.
Sort Milestones by Program	Select this check box to sort and display milestones by academic program on the transcript.
Scholarships and Grants Print Area	Select the print area to indicate where the system displays scholarship and grant information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Values are <i>Transcript Header</i> , <i>Transcript Trailer</i> , and <i>Do Not Display</i> . The system extracts other institution-attended information from the student's admissions record.

Scholarships and Grants Print Seq

The print sequence determines the order in which scholarships and grants information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Enrollment and Statistics Data

Access the Transcript Type - Enrollment/Statistics page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Enrollment/Statistics).

Basic Data	Careers	General	Degrees/Program	Enrollment/Statistics	Transfer/Test/Other Credits
Find View All First 1 of 1 Last					
Academic Institution: PSUNV PeopleSoft University Transcript Type: ALLOF Official Transcripts - All Effective Date: 07/19/1997					
Enrollment					
*Print Area: Enrollment Detail Print Seq: 30 Term Title to Use: Short Desc Course List Sort Order: Session / Subj Session Title to Use: Short Desc ☐ Include Historical Enrollment			☐ Print Course Topic ☐ Print Course Attributes ☐ Print Contact Hours ☐ Print Instructor Name ☐ Print Transcript Notes ☐ Print Class Dates ☒ Print OEE Class Dates ☐ Obey Enrlmnt on Transcript Dt ☐ Obey Fully Graded Date		
Withdrawal Information					
*Print Area: Enrollment Detail Print Seq: 20					
Term Statistics			Cumulative Statistics		
*Print Area: Enrollment Trailer Print Seq: 40 ☐ Print Transfer Credit Stats ☒ Obey Show Stats on Tscript Dt			☒ Print Cums at Change of Pgm ☒ Print Cums at End of Tscript		
Term Honors					
*Print Area: Enrollment Trailer Print Seq: 50					
Academic Standing					
*Print Area: Enrollment Trailer Print Seq: 60					

Define Transcript Type - Enrollment/Statistics page

Enrollment Print Area

Select the print area in order to indicate where the system displays enrollment information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires substantial programming effort. Values are *Enrollment Detail* and *Do Not Display*.

Enrollment Print Seq (enrollment print sequence)	The print sequence determines the sequence in which enrollment information appears within the print area. The system populates the print sequence by default. You can change this value.
Term Title to Use	Select the type of term title that you want to appear on the transcript. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values requires a substantial programming effort. Values are <i>Long Description</i> and <i>Short Description</i> .
Course List Sort Order	Select the course list sort order in which the system displays courses within a term. You can select to sort by <i>Session Number and Subject Area</i> or <i>Subject Area and Course Catalog Number</i> .
Session Title to Use	If you select a course list sort order of <i>Session Number and Subject Area</i> , the Session Title to Use field becomes available for entry. Select the <i>Long Description</i> or <i>Short Description</i> of the session title that you want to appear on the transcript.
Include Historical Enrollment	Select this check box for the system to display historical enrollment information that was entered into the Historical Course Enrollment page and its corresponding table. This information is separate from the usual student enrollment data. <u>See Chapter 34, "Using Enrollment-Related Processes," Creating Historical Enrollment Records, page 831.</u>

Note. If you select the Include Historical Enrollment check box, be sure that you set the Last Term for Historical Enrollment field to the latest term possible for historical enrollment records on the Academic Career Table page.

Also note that term 0000 does not allow historical enrollment data to print on a transcript. If you want historical enrollment data to print on a student's transcript, you must select a term value other than 0000.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Describing Academic Career Parameters.

Print Course Topic	Displays course topics associated with specific courses.
Print Course Attributes	Displays the course attributes associated with specific courses.
Print Contact Hours	Displays the instructor's contact hours.
Print Instructor Name	Displays the instructor name for each class.
Print Transcript Notes	Displays the transcript notes attached to student enrollment records.
Print Class Dates	Displays the class begin and end dates if set on the term/session table.

Print OEE Class Dates (print open entry/exit class dates)	Displays the student's unique begin date for each Open Entry/Open Exit class taken.
Obey Enrlmmt on Transcript Dt (obey enrollment on transcript date)	Select this check box for the system to display all enrollment information that is <i>fully enrolled</i> as of the transcript create date. The fully enrolled date is defined on the Academic Term Calendar 3 page. The date is set by default to the student's term activation record during term activation. You can manually change the date on a per student basis. The transcript process looks at the date on the student's term activation record. If you do not select this check box, all enrollment information that exists at the time that the transcript is processed appears on the transcript.
Obey Fully Graded Date	If you do not select this check box, partially graded terms and sessions print on the transcript. Select this check box for the system to only display classes with fully graded dates less than or equal to the run date. The fully graded date is defined on the Academic Term Calendar 3 page. The date is set by default to the student's term activation record during term activation. You can manually change the date on a per student basis. The transcript process looks at the date on the student's term activation record.
Withdrawal Information Print Area	Select the print area to indicate where the system displays withdrawal information. Values are <i>Enrollment Detail</i> and <i>Do Not Display</i> .
Withdrawal Information Print Seq (withdrawal information print sequence)	The print sequence determines the order in which withdrawal information appears within the print area. The system populates the print sequence by default. You can change the value. In the example, the enrollment information appears before the withdrawal information because both types of information have a print area of enrollment detail, and the print sequence for withdrawal information is greater than the print sequence enrollment information.
Term Statistics Print Area	Select the print area to indicate where the system displays term statistics information. Values are <i>Enrollment Header</i> , <i>Enrollment Trailer</i> , and <i>Do Not Display</i> . The system calculates statistics when you run the grade posting process. Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort.
Term Statistics Print Seq (term statistics print sequence)	The print sequence determines the order in which term statistics information appears within the print area. The system populates the print sequence by default. You can change the value. In the example, term statistics, term honors, and academic standing print in the Enrollment Trailer area. Term statistics print first because the print sequence is less than both term honors and academic standing print sequence values.

Print Transfer Credit Stats (print transfer credit statistics)	Select this check box for the system to include transfer credit statistics in the display. When this check box is selected, transfer credit statistics appear separately from enrollment statistics wherever the term and cumulative statistics have been selected to print. In addition, when this check box is selected, the transfer credit is added into the combined statistics for both the term and the cumulative.
Obey Show Stats on Tscript Dt (obey show statistics on transcript date)	Select this check box for the system to display statistics only if the transcript process date is greater than or equal to the show statistics on transcript date value. The show statistics on transcript date value is defined on the Academic Calendar 3 page. The date is set by default to the student's term activation record during term activation. You can manually change the date on a per student basis. The transcript process looks at the date on the student's term activation record. If you do not select this check box, the system displays the statistics as of the last term.
Cumulative Statistics	The Cumulative Statistics group box enables you to determine where the system displays statistics. You can select the Print Cums at Change of Pgm (print cumulatives at change of program) check box. You can also select the Print Cums at End of Tscript (print cumulatives at end of transcript) check box on its own or in combination with the other check box.
Term Honors Print Area	Select the print area in order to indicate where the system displays term honors information. Values are <i>Enrollment Header</i>, <i>Enrollment Trailer</i>, and <i>Do Not Display</i>. Print area values are delivered with your system on the Print Area Table page. Any modification to these values requires programming effort.
Term Honors Print Seq (term honors print sequence)	The print sequence determines the order in which term honors information appears within the print area. The system populates the print sequence by default. You can change the value.
Academic Standing Print Area	Select the print area in order to indicate where the system displays academic standing information. Values are <i>Enrollment Header</i>, <i>Enrollment Trailer</i>, and <i>Do Not Display</i>. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires a substantial programming effort.
Academic Standing Print Seq (academic standing print sequence)	The print sequence determines the order in which academic standing information appears within the print area. The system populates the print sequence by default. You can change the value.

Designating Transfer/Test/Other Data

Access the Define Transcript Type - Transfer/Test/Other Credits page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Transfer/Test/Other Credits).

Basic Data Careers General Degrees/Program Enrollment/Statistics **Transfer/Test/Other Credits**

Find | View All First 1 of 2 Last

Academic Institution: PSUNV PeopleSoft University

Transcript Type: ALLOF Official Transcripts - All

Effective Date: 07/19/1997

Transfer Credits

'Print Area: Enrollment Detail Print Seq: 40

☒ Print Posted Models Only

Inter-Career Transfer: Level of Detail: Summary Detail to Print:

Inter-Institution Transfer: Level of Detail: Summary Detail to Print:

External Organization Transfer

☐ Obey External Org Parms Detail Internal Equivalent Course

Test Credits

'Print Area: Enrollment Detail Print Seq: 50

Level of Detail: Detail Details: Internal Equivalent Course

☒ Print Posted Models Only

Other Credits

'Print Area: Enrollment Detail Print Seq: 60

Level of Detail: Detail Details: Internal Equivalent Course

☒ Print Posted Models Only

Define Transcript Type - Transfer/Test/Other Credits page

Transfer Credits

Print Area

Select the print area to indicate where the system displays Transfer Credit information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires substantial programming effort. Values are *Enrollment Detail*, *Enrollment Trailer*, *Transcript Header*, *Transcript Trailer*, and *Do Not Display*.

Note. If you select a value of *Enrollment Detail* with a Level of Detail field value of *Detail*, then the system populates by default and makes the following fields unavailable for entry: Print Posted Models Only: *Selected*; Inter-Career Transfer (Detail to Print): *Internal Equivalent Course*; Inter-Institution Transfer (Detail to Print): *Internal Equivalent Course*; and External Organization Transfer: *Internal Equivalent Course*.

Print Seq (print sequence)

The print sequence determines the order in which transfer credit information appears within the print area. The system populates the print sequence by default. You can change the value.

Print Posted Models Only	If you select any print area other than <i>Enrollment Detail</i>, the Print Posted Models Only check box is available for entry. Select the Print Posted Models Only check box to display transfer credit from posted models only. If this check box is available and you do not select it, transfer credit from all models (posted, completed, and not posted) appears. Transfer credit print details are organized in three categories: Inter-Career, Inter-Institution, and External Organization transfers.
Inter-Career Transfer	Transfers from academic career to academic career (or academic program to academic program, same academic career) in your institution. The source of data is the student's enrollment record at your institution.
Inter-Institution Transfer	Transfer between an external institution with which your institution shares a database. The source of data is the student's enrollment record at the external institution, but with a shared database you can bypass the data entry of external courses.
Level of Detail	Select the level of detail to print for each type of transfer. Values are: <i>Summary</i>: The system only displays total units transferred. <i>Detail</i>: The system displays the course details, depending upon your selection in the Detail to Print field.
Detail to Print	If you select <i>Detail</i> in the Level of Detail field, the Detail to Print field becomes available for entry. Values are <i>External and Internal</i> , <i>External Courses</i> , and <i>Internal Equivalent Course</i> .
External Organization Transfer	Most transfers fall into this category. Transfers between an external institution and your institution. The source of data is the external organization and is entered as external course work.
Obey External Org Parm (obey external organization parameters)	Select this check box to obey the external organization transfer credit parameters on the Organization Affiliation page. Usually, you select this check box in order for official transcripts to follow the defaults set for printing external transfer information.
Test Credits	
Print Area	Select the print area to indicate where the system displays test credit information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires a substantial programming effort. Values are <i>Enrollment Detail</i> , <i>Transcript Header</i> , <i>Transcript Trailer</i> , and <i>Do Not Display</i> .
Print Seq	The print sequence determines the order in which test credit information appears within the print area. The system populates the print sequence by default. You can change the value.

Level of Detail

Select the level of detail to print for test credit. Values are:

Summary: The system displays only total test credit units.

Detail: The system displays the test credit details, depending upon your selection in the Details field.

Details

If you select *Enrollment Detail* as the print area and a level of detail value of *Detail*, the system populates the Details field with *Internal Equivalent Course*. You cannot alter the details value.

If you select *Transcript Header* or *Transcript Trailer* as the print area, and a level of detail value of *Detail*, you can select which details to print. Values are *Internal Equivalent Course*, *Test and Internal Equivalents*, and *Test Credits*.

Note. If you select a level of detail of *Summary*, regardless of the print area you select, the Details field is unavailable for entry.

Print Posted Models Only

If you select any print area other than enrollment detail, the Print Posted Models Only check box becomes available for entry. Select the Print Posted Models Only check box to display only test credit from posted models. If this check box is available but you do not select it, test credit from all models (posted and not posted) appears.

Other Credits**Print Area**

Select the print area where other credit information will print. Print area values are delivered with your system in the Print Area Table page. Any modification to these values requires programming effort. Values are *Enrollment Detail*, *Transcript Header*, *Transcript Trailer*, and *Do Not Display*.

Print Seq

The system populates the print sequence by default. The print sequence determines the order in which other credit information appears within the print area. You can change the value.

Level of Detail

Select the level of detail to print for other credit. Values are:

Summary: The system only displays the cumulative total of other credit units.

Detail: The system displays the other credit details, depending upon your selection in the Details field.

Details

If you select *Enrollment Detail* as the print area and a level of detail value of *Detail*, the system populates the Details field with *Internal Equivalent Course*. You cannot alter the details value.

If you select *Transcript Header* or *Transcript Trailer* as the print area, and a level of detail value of *Detail*, you can select which details to print. Values are *Internal Equivalent Course*, *Other Credit and Internal Equivalents*, and *Other Credits*.

Note. If you select a level of detail of *Summary*, regardless of the print area you select, the Details field is unavailable for entry.

Print Posted Models Only

If you select any print area value other than *Enrollment Detail*, the Print Posted Models Only check box becomes available. Select the Print Posted Models Only check box for the system to display other credit from posted models only. If this check box is available and you do not select it, other credit from all models (posted and not posted) appears.

Designating Transcript Type Test Scores

Access the Define Transcript Type - Test Scores page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Test Scores).

Test Scores		
*Print Area:	Transcript Header	Print Seq: 100
☐ Latest Test Only		
*Test ID	*Test Component	Data Source
MCAT	Verbal Reasoning	School

Define Transcript Type - Test Scores page

Test Scores Print Area

Select the print area to indicate where the system displays test score information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires substantial programming effort. Values are *Transcript Header*, *Transcript Trailer*, and *Do Not Display*.

Test Scores Print Seq	The print sequence determines the order in which test score information appears within the print area. The system populates the print sequence by default. You can change the value.
Latest Test Only	Select this check box to only include the student's latest test scores on file in the system.
Test ID	Select the identification number of the tests to be displayed.
Test Component	Select the component of the tests to be displayed.
Data Source	Select the data source of the tests to be displayed.

Designating Special GPA Information

Access the Define Transcript Type - Special GPA page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, Special GPA).

The screenshot shows the 'Define Transcript Type - Special GPA' page. The 'Special GPA' tab is active. The page displays the following information:

- Academic Institution:** PSUNV, PeopleSoft University
- Transcript Type:** ALLOF, Official Transcripts - All
- Effective Date:** 07/19/1997
- Special GPA Section:**
 - *Print Area:** Enrollment Header (dropdown)
 - Print Seq:** 20
 - Table:**

Seq Nbr	Description
1	Continuing Education
 - *GPA Type:** (empty field with search icon)
 - Print With:** Term Stats (dropdown)

Define Transcript Type - Special GPA page

Special GPA Print Area	Select the print area to indicate where the system displays GPA information. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values requires substantial programming effort. Values are <i>Transcript Header</i> , <i>Transcript Trailer</i> , and <i>Do Not Display</i> .

Special GPA Print Seq
(special GPA print sequence)

The print sequence determines the order in which GPA information appears within the print area. The system populates the print sequence by default. You can change the value.

GPA Type

Special GPAs are defined by academic career. Select the special GPAs to be displayed.

Print With

This field identifies whether the special GPA represents a GPA for one term or represents a cumulative GPA. This setup determines where the special GPA will print, with term statistics or with the cumulative statistics.

Defining Data Sorting Order

Access the Define Transcript Type - View Sort page (Set Up SACR, Product Related, Student Records, Transcript, Define Transcript Type, View Sort).

[Enrollment/Statistics](#)
[Transfer/Test/Other Credits](#)
[Test Scores](#)
[Special GPA](#)
[View Sort](#)

Academic Institution: PSUNV PeopleSoft University

Transcript Type: ALLOF Official Transcripts - All

Find | View All First 1 of 2 Last

Effective Date: 07/19/1997

Page and Transcript Header Customize | Find First 1-8 of 8 Last

Print Area	Row Type	Sort
Page Header	Institution Data	10
Page Header	Print Date	20
Transcript Header	Admissions	10
Transcript Header	Attendance Dates	20
Transcript Header	External Institutions	30
Transcript Header	External Degrees	70
Transcript Header	Program	90
Transcript Header	Test Scores	100

Enrollment Customize | Find First 1-8 of 8 Last

Print Area	Row Type	Sort
Enrollment Header	Local Degrees	10
Enrollment Header	Special GPA	20
Enrollment Detail	Withdrawal	20
Enrollment Detail	Enrollment	30
Enrollment Detail	Transfer Credits	40
Enrollment Trailer	Term Statistics	40
Enrollment Trailer	Term Honors	50
Enrollment Trailer	Academic Standing	60

Define Transcript Type - View Sort page (1 of 2)

Transcript Trailer		Customize Find 	First	◀	1 of 1	▶	Last
Row Type		Sort					
Milestone		10					

Do Not Display		Customize Find 	First	◀	1-8 of 8	▶	Last
Row Type							
Student Info							
Test Credits							
Other Credits							
Basis of Admission							
Requester							
Reason							
Recipient							
Scholarships and Grants							

Define Transcript Type - View Sort page (2 of 2)

- Page and Transcript Header

View the rows that the system displays on the header portion of the transcript, and the order in which they are set to appear.
- Enrollment

View the rows that the system displays in the enrollment portion of the transcript, and the order in which they are set to appear.
- Transcript Trailer

View the rows that the system displays in the trailer portion of the transcript, and the order in which they are set to appear.
- Do Not Display

View the rows that the system does not display in the transcript.

Setting Up Electronic Transcript Processing

To set up electronic transcript processing, use the TS130/TS131 Setup component (TS130_CONTROL).

This section discusses how to:

- Define TS130 and TS131 controls.
- Define reporting codes and email information.
- Define TS130 contacts.
- Set up data maps for TS130 outbound processing.

See Also

Chapter 45, "Producing Transcripts," Producing Electronic Transcripts, page 1138

Pages Used to Set Up Electronic Transcript Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TS130/TS131 Setup	TS130_CONTROL	Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130/TS131 Setup	Define codes and values that will be reported in the TS130 and TS131 files.
TS130 Setup	TS130_CONTROL2	Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130 Setup	Define reporting code formats and information about the email message the system will generate, such as what goes on the subject line and what the sender email address will be.
TS130 Contacts	TS130_CONTROL_COM	Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130 Contacts	Specify the contact information for your organization that you want included in the outbound file.

Defining TS130 and TS131 Controls

Access the TS130/131 Setup page (Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130/TS131 Setup).

TS130/131 Setup		TS130 Setup	TS130 Contacts
Academic Institution: PSUNV PeopleSoft University			
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active
*Separator:	*		
*End of Line:	~		
*Sub-element Separator:	^		
*Institution Code to Report:	Mutually Defined		
*Sending Institution Code:	123456789012345		
*Sending Status:	Test Data		
☐ Acknowledgement Requested			
*Receive Institution Code (ISA):	FICE Code		
*Send Institution Code (N1):	ATP Code		
*Sending Institution Code (N1):	54231		
*Receive Institution Code (N1):	FICE Code		
☒ Using TS130			

TS130/131 Setup page

Separator	Insert a character that separates values in the output file.
End of Line	Insert a character that ends a line in the output file. This value must be different from the separator value.
Sub-element Separator	Insert a character that the system uses to separate component data structure. This character must be different from the separator and end of line delineators.
Institution Code to Report	Choose the type of code that you report on the ISA segment (Interchange Control Header Data Element Summary) as the Interchange ID Qualifier for the Interchange Sender ID. The values are <i>ACT Code</i> , <i>ATP Code</i> , <i>FICE Code</i> , <i>IPEDS Code</i> , <i>Mutually Defined</i> , <i>Stat Canada College Student</i> , <i>Stat Canada Postsecondary</i> , and <i>Stat Canada Uni Student Inst</i> .
Sending Institution Code	Enter your institution's appropriate code, as determined by the value you select in the Institution Code to Report field.
Sending Status	Select <i>Test Data</i> while the institution is sending test files to trading partners. Select <i>Production Data</i> after testing is complete and TS130 outbound transactions are official.

Acknowledgement Request	Select to request the receiving institution to respond with a TS997 Functional Acknowledgement.
Received Institution Code (ISA)	Choose the type of code that you report on the ISA segment (Interchange Control Header Data Element Summary) as the Interchange ID Qualifier for the Interchange Receiver ID. Values are <i>ACT Code</i> , <i>ATP Code</i> , <i>FICE Code</i> , and <i>IPEDS Code</i> . These values are defined on the Organization Table page for each institution.
Send Institution Code (N1)	Choose the type of code that you report on the N1 segment (Name [Sending/Receiving Institution]) as the identification code qualifier. Values are <i>ACT Code</i> , <i>ATP Code</i> , <i>College Board and ACT</i> , <i>FICE Code</i> , <i>IPEDS Code</i> , <i>Statistics Canada College</i> , and <i>Statistics Canada University</i> .
Sending Institution Code (N1)	Enter the appropriate code for your institution, as determined by the value entered in the Send Institution Code field.
Receive Institution Code (N1)	Select the appropriate code that the institution reports as the recipient in the N1 segment. Values are <i>ACT Code</i> , <i>ATP Code</i> , <i>FICE Code</i> , and <i>IPEDS Code</i> . These values are defined on the Organization Table page for each institution.
Using TS130	Select if you process TS130 outbound transactions for this institution.

Note. If the characters you enter in the Separator, End of Line or Sub-element Separator fields appear within any text that is included in the output file, the receiving institution recognizes the character and inappropriately separates a field or ends a line. Select characters that are *not* found in any fields or text that is part of the output file.

Defining Reporting Codes and Email Information

Access the TS130 Setup page (Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130 Setup).

TS130/131 Setup		TS130 Setup		TS130 Contacts	
Academic Institution: PSUNV PeopleSoft University					
Find View All First 1 of 1 Last					
Effective Date:		01/01/1900		Status: Active	
TS130 Report Setup					
External Institution Code:		FICE Code			
Course/Field of Study Code:		CIP Code			
Lowest Possible GPA:		0			
Highest Possible GPA:		4			
Historic Enrol Grade Qualifier:		517			
Email Address					
TS130 E-Mail Subject:					
TS130 Subject					
Email Address:					
Registrar					
File Name:					
etranscript.txt					
Default Path for Output File:					
\\localhost\temp\					

TS130 Setup page

- External Institution Code** Select the type of code that the institution reports for students' previously attended institutions that are reported for other institutions attended. Values are *ACT Code*, *ATP Code*, *FICE Code*, and *IPEDS Code*. These values are defined on the Organization Table page for each institution.
- Course/Field of Study Code** Select the type of course or field of study code that the institution reports. Values are *CIP Code* and *HEGIS Code*. Course codes are defined on the Offerings page of the Course Catalog component and field of study codes are defined on the Academic Plan Taxonomy page.
- Lowest Possible GPA** Enter the numeric value for the lowest possible GPA at this institution to be reported in the SUM (Academic Summary) segment.
- Highest Possible GPA** Enter the numeric value for the highest possible GPA at this institution to be reported in the SUM (Academic Summary) segment.

Historic Enrol Grade Qualifier	Enter the academic grade qualifier code that you report with historical course enrollments. The codes are based on the American Medical Colleges Admissions Services (AMCAS) grade scale. Please refer to Appendix B of the American National Standards Institute Accredited Standards Committee (ANSI ASC) X12 Version 4.0 Implementation Guide dated April 1998.
TS130 E-Mail Subject	Enter a free form text that the system uses as the subject line in the email that delivers the TS130.
Email Address	Enter free form text that the system uses as the sender of the TS130 email.
File Name	Enter the file name that you want the system to use for each TS130 file when the system creates the file. The system inserts the control number before the file extension to identify unique files.
Default Path for Output File	Enter the default path to which the system writes the TS130 file at the time it is generated.
Note. Users must have write permission for this specified directory to prevent runtime errors. Also, you must enter the final slash in the file path.	

Defining TS130 Contacts

Access the TS130 Contacts page (Set Up SACR, Common Definitions, TS130/TS131 Setup, TS130 Contacts).

TS130/131 Setup **TS130 Setup** **TS130 Contacts**

Academic Institution: PSUNV PeopleSoft University

Find | View All First 1 of 1 Last

Effective Date:	01/01/1900	Status:	Active
Contact Function Code:	Registrar		
Name:	Pat Smith		

Communication Info Find | View All First 1 of 1 Last

Communication Type:	Telephone	
Communication Number:	888-555-1212	

TS130 Contacts page

Contact Function Code	Select the function code, which identifies the major responsibilities of the person or office to which the system directs administrative communications about the TS130.
Name	Enter a free form name for the contact.
Communication Type	Select the type of communication that defines the communication number. You can add up to three communication types.
Communication Number	Enter a free form communication number, such as a telephone number.

Setting Up Data Maps for TS130 Outbound Processing

To report the correct standardized codes in the TS130 output file, users must map their internal values to the correct standard code. For instance, because the Degree table is a user-defined table, users must map an internal value of *BA* to a standard code of 2.4.

The system uses the Conversion Data Profile found within the EDI Manager to define these values. If you are currently using the TS130 Inbound process, you have already mapped several tables and fields. The TS130 Outbound process uses some of the same profiles, but it requires additional ones.

To set up data maps for TS130 Outbound processing, navigate to the EDI_CONV conversion data profile. Go to PeopleTools, EDI Manager, Convert EDI/PeopleSoft Code, Conversion Date Profile. Enter *EDI_CONV* in the EC Convert Profile ID field on the search page.

While mapping your internal values to external codes, you might find that you have a many-to-one mapping situation, where multiple internal values could be used to map to the same external code. In this situation, the process picks up the codes for which you selected the Int Deflt (internal default) check box.

We deliver the following convert type IDs, however, users must define the internal and external values for each type:

Convert Type IDs	Internal Values	Maps To
ACAD_CAR: TS130 Course Level per Career	ACAD_DEGREE.DEGREE AND EXT_DEGREE.DEGREE	DEG01
DEGR_HONOR: TS130 Degree Honors	ACAD_DEGR_HONS.HONORS_CODE	DEG05
FOS_LEVEL: TS130 Field of Study Level	ACAD_PLAN_TBL.ACAD_PLAN_TYPE	FOS01
GRADE_BAS: EDI TS130/TS189 Grade Basis	STDNT_ENRL.GRADING_BASIS_ENRL	CRS05
MILESTONE: TS130 Student Milestone	STDNT_CAR_MLSTN.MILESTONE	ATV02
STDNT_AWRD: EDI TS130 Student Award	HONOR_AWARD_CS.AWARD_CODE	ATV02

Convert Type IDs	Internal Values	Maps To
TERM_CATEG: EDI TS130 Term Category	TERM_TBL.TERM_CATEGORY	SES02

Mapping Transcript Type to TS130 Files

While several segments and elements are required with the TS130 file, users can define the overall content that the system reports in the electronic transcript. Depending on the transcript type associated with the electronic transcript request, you can choose what student information gets reported. If a piece of information is set to print as defined by the transcript type, and there is a corresponding functional segment available on the TS130, then the system reports it on the TS130, disregarding the exact print sequence and print area.

Exceptions to the previous rule include:

- Transcript text is not currently included in the output file.
- For transfer credit (course, test, and other) to be reported, the level of detail must include the internal equivalent.

Chapter 15

Preparing to Consolidate and Report Academic Statistics

Before you can consolidate academic statistics and use them for reporting, you must perform prerequisite setup tasks. After you complete the prerequisites, you can run the Consolidate Academic Statistics process (SRPCCONP) to generate consolidated statistics data on students and, ultimately, create reports that are based on this data. This chapter discusses how to set up the following items for reporting:

- Academic institutions.
- Academic careers and programs.
- Academic level and load rules.
- Student attributes.
- Extracurricular activities
- Veterans' biographic and demographic data.
- National Student Clearinghouse (NSC) branch codes.
- Statistic period types.
- Academic statistics periods.

See Also

Chapter 46, "Consolidating and Reporting Academic Statistics," page 1157

Setting Up Academic Institutions for Reporting

Use the Academic Institution 3 page to set up the default student attribute for cohort that your academic institution uses for cohort reporting. Use this page also to define NSC reporting options, such as the default Federal Interagency Committee on Education (FICE) code for your academic institution, and how the NSC Extract process calculates each student's anticipated graduation date.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Institutions

Setting Up Academic Careers and Academic Programs for Reporting

Complete the following setup tasks for academic careers and programs:

- Define primacy for academic careers on the Academic Career Table 2 page and for programs on the Academic Program page.

Because reporting agencies require that you report a student at a given point in time under one academic career and one academic program, define primacy for all academic careers and programs. When the Consolidate Academic Statistics process (SRPCCONP) encounters a student who is active in multiple academic careers or academic programs for an academic statistics period, the process locates the student's primary academic career and program, based on the student's academic career and program that have the lowest primacy number at the academic institution. The process consolidates all of the student's academic career, program, level, load, and other academic statistic information into one record for reporting. For example, a student might be actively enrolled in a JD program and an MA program. These academic programs might be within different academic careers. At any point in time, the student might be enrolled part-time in the JD program and part-time in the MA program. By defining primacy, the Consolidate Academic Statistics process can calculate a student's level and load under one primary academic career and program, using *all* the level and load elements on a student's record. If the JD program has the lower primacy number at the academic institution, the student is reported full-time under the JD program. The process uses the institutional-level primacy rather than the student-level primacy so that the reports always coincide with your institution's financial aid processing.

- Indicate, on the Academic Career Table 2 page, whether an academic career qualifies as graduate level for tax reporting and NSC reporting.
- Indicate, on the Academic Program page, whether students in an academic program are eligible for financial aid.

The Consolidate Academic Statistics process excludes from its process calculations the academic programs in which students are not eligible for financial aid.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Setting Additional Academic Career Parameters

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Describing Academic Programs

Setting Up Academic Level and Load Rules for Reporting

Use the Level/Load Rules component to define academic level and load rules for *every* academic career. The Consolidate Academic Statistics process (SRPCCONP) uses the defined rules to locate a student's academic level and load.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Level and Load Rules

Setting Up Student Attributes for Reporting

Use the Student Attributes page to assign student attribute and student attribute values to a student, and to indicate the primacy of each one. The Consolidate Academic Statistics process (SRPCCONP) locates a student's primary cohort based on the data on this page. You can then use students' primary cohort data for reporting and analysis.

See Also

Chapter 41, "Tracking Student Data," Tracking Student Attributes, page 1013

Setting Up Extracurricular Activities for Reporting

Use the Extracurricular Activity Table page to define extracurricular activity codes and to define the primacy of the extracurricular activities for your setID. Before you can track extracurricular activities for students, set up these extracurricular activity codes. After you set up the codes, you can use the Extracurricular Activity page in Student Records or PeopleSoft Recruiting and Admissions to track extracurricular activities for individuals.

See Also

Chapter 41, "Tracking Student Data," Tracking Extracurricular Activities, page 1011

Setting Up Biographic and Demographic Data for Veterans Reporting

Use the Bio/Demo Data component to indicate whether your institution is disbursing veteran benefits for a student. You can use this information, in conjunction with the Consolidate Academic Statistics process (SRPCCONP) and the Veterans Report process, to produce a hard-copy report listing all the students who receive veterans benefits at your institution. Then you can send the report to the Veterans Administration as required by the federal government.

On the Bio/Demo Data page, select the VA Benefits check box to indicate that the student receives veterans benefits. Use the Addresses page to indicate where the veterans benefits check is to be sent. The Veterans Administration needs this data to verify that the address they have for the recipient matches the address that your institution has. When you run the Veterans report, the report uses the address that you enter for the veterans address type.

To accurately report a student's academic load to the Veterans Administration, run the Consolidate Academic Statistics process before running the Veterans Report process to produce the report. When you run the Consolidate Academic Statistics process, it locates a student's academic load, based on their primary academic career and program, then stores the student's academic load in the consolidated statistics table. When you run the Veterans Report process, it uses the academic load in the consolidated statistics table for the report.

See Also

[Chapter 46, "Consolidating and Reporting Academic Statistics," page 1157](#)

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding a Person to Your Campus Solutions Database," Adding or Updating Biographical Details Data

Setting Up Branch Codes for NSC Reporting

To set up branch codes, use the NSC Branch Table component (NSLC_BRANCH_TBL).

This section discusses how to define NSC branch codes for NSC reporting.

Page Used to Set Up NSC Branch Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NSC Branch Table (National Student Clearinghouse branch table)	NSLC_BRANCH_TBL	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, NSC Branch Table, NSC Branch Table	Define the branch codes that your academic institution uses when reporting enrollment status to the NSC.

Defining NSC Branch Codes for Reporting

Access the NSC Branch Table page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, NSC Branch Table, NSC Branch Table).

NSC Branch Table

Find | View All
1 of 1

Academic Institution: PSUNV PeopleSoft University

***Branch Code:** 81
 ***Effective Date:** 01/01/1900
 Status: Active

***Description:** PSUNV
 Short Description: PSUNV

Acad Prog		Campus		Career		
MED	Medicine					
				Law		
				Medical		
		WALCR	Walnut Creek Campus	D.V.M.		

NSC Branch Table page

The NSC requires that your institution defines a branch code for each group of students that has its own reporting time line. For example, if you have multiple campuses at your academic institution, and you are reporting each of these campuses separately to the NSC at different times of the year, you might use a different branch code for each campus.

Another example is if your institution has academic programs that are running on different calendars. For instance, your institution has a law program, a medical program, an undergraduate program, and a graduate program. Whereas the undergraduate and graduate programs might run on a semester term type, the law and medical programs might run on quarter term type. In such a case, your institution might use different branch codes for the semester programs and the quarter programs.

Academic Institution Select the academic institution for which you are defining the branch code.

Branch Code Enter the branch code for the academic institution according to the NSC contractual agreement.

Acad Prog (academic program) (Optional) Select the academic program associated with this branch code so that when you run the NSC Extract process, it reports data for only these students.

Campus (Optional) Select the campus associated with this branch code so that when you run the NSC Extract process, it reports data for only these students.

Career (Optional) Select the academic career associated with this branch code so that when you run the NSC Extract process, it reports data for only these students.

Setting Up Statistic Period Types

To set up statistic period types, use the Academic Statistics Type component (ACAD_STAT_TYPE).

This section discusses how to define statistic period types.

Page Used to Set Up Statistic Period Types

Page Name	Definition Name	Navigation	Usage
Academic Statistics Type	ACAD_STAT_TYPE	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Define Statistics Type, Academic Statistics Type	Define statistics period types.

Defining Statistics Period Types

Access the Academic Statistics Type page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Define Statistics Type, Academic Statistics Type).

Academic Statistics Type

Statistics Period Type: IP

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Description: IPEDS

Short Description: IPEDS

☒ Enforce FA Eligibility ☒ IPEDS Report

Include the Following Program Statuses

	Academic Program Status		
1	Active in Program		
2	Completed Program		

Academic Statistics Type page

Statistics period types are descriptors of an academic statistics period, helping to identify the type of reporting requirement that relates to a particular academic statistics period. For example, you might define the statistics period type *IP* for IPEDS reporting, *N* for NSC reporting, and *SR* for the Student Record Census report. You will later attach statistics period types to academic statistics periods on the Academic Statistics Period page.

Enforce FA Eligibility
(enforce financial aid eligibility)

Select to have the Consolidate Academic Statistics process (SRPCCONP) use the value of the Financial Aid Eligible check box on the Academic Program page for this statistics period type.

Clear this check box to have the Consolidate Academic Statistics process disregard the value of the Financial Aid Eligible check box on the Academic Program page for this statistics period type. The Consolidate Academic Statistics process will thus retrieve all students that meet its processing parameters, regardless of the financial aid eligibility of the student's academic program.

For example, you would clear this check box for any statistics period type in which you need to report statistics for all students regardless of their financial aid eligibility, such as with the NSC Extract report or the IPEDS report.

IPEDS Report

Select to identify an academic statistics type as being used for IPEDS reporting purposes. This field is available only when the installation country (INSTALLATION.COUNTRY) = USA.

When attached to an academic statistics period, an IPEDS Report statistics type identifies the statistics period as an IPEDS reporting period, which enables the Consolidate Academic Statistics process (SRPCCONP) to report a student's ethnicity according to the IPEDS reporting requirements.

Academic Program Status

Select the students' academic program status for the Consolidate Academic Statistics process to consider and include in its results. For an academic statistics period to which this statistics period type is attached, the Consolidate Academic Statistics process will include in its results only the students with the academic program statuses specified here. Thus, you can define various statistics period types for different reporting needs. For example, you can define a statistics period type for NSC reporting that includes all of the academic program statuses that your institution is required to report to the NSC.

Include if Term Activated

This check box is available for all Academic Program Status values other than *Active in Program* and *Completed Program* (because the Consolidate Academic Statistics process always selects these values).

When the check box is selected, the process includes students with a non-active status, if they are term activated in the reporting term. For example, you select the Include if Term Activated check box for the program status of *Leave of Absence* for a particular statistics period type. You then run the process for a statistics period, with the updated statistics period type, and a date of 09/15/2007. The reporting term is Fall 2007(8/30/2007 – 12/12/2007). A student has a program status of *Leave of Absence*, with an effective dated row of 07/15/2007 – the student's program is therefore not active at the begin date of the reporting term. However, if the student is term activated for Fall 2007, the Consolidate Academic Statistics process includes this student's record.

Setting Up Academic Statistics Periods

To set up academic statistics periods, use the Academic Statistics Period component (ACAD_STATS_PERIOD).

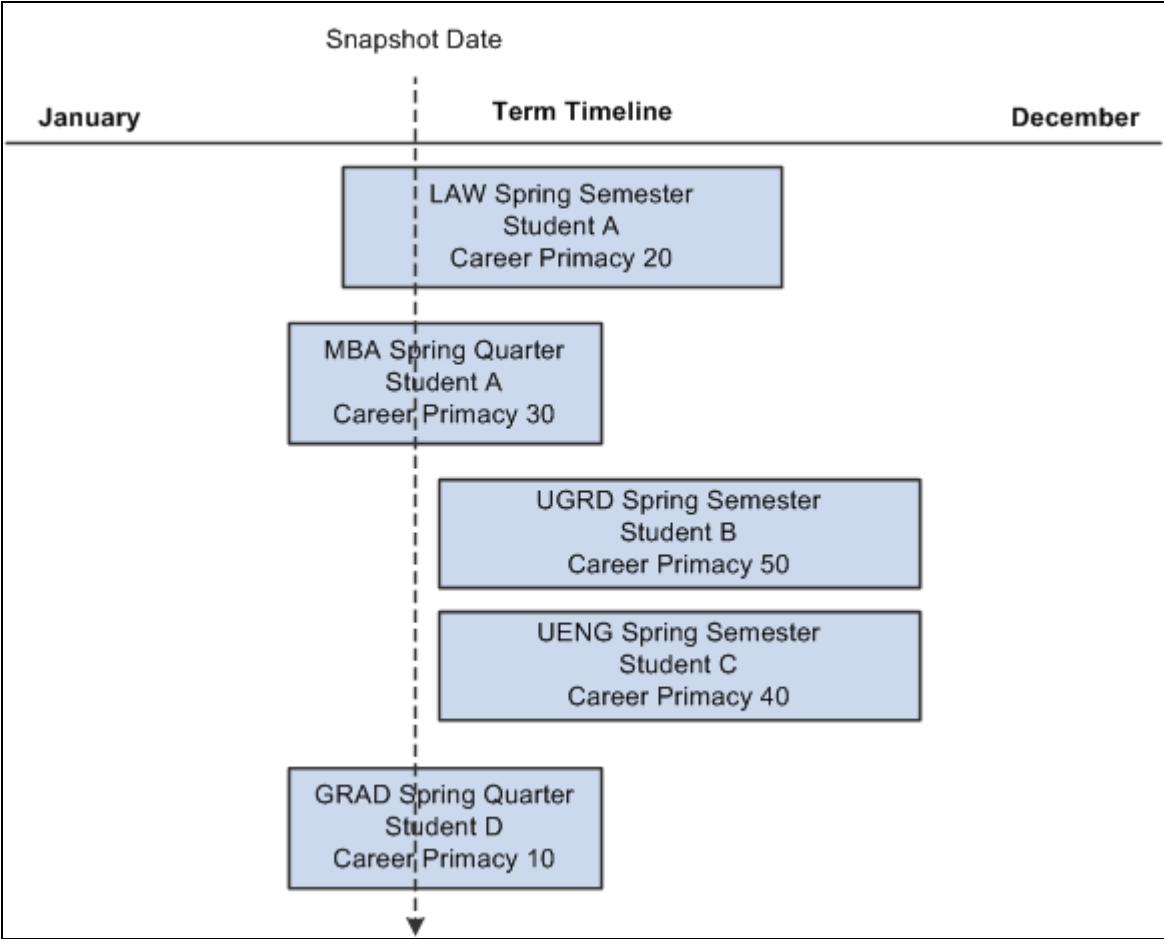
This section provides an overview of academic statistic periods and discusses how to define them.

Understanding Academic Statistics Periods

An academic statistics period is the rule that the Consolidate Academic Statistics process (SRPCCONP) uses to control exactly when and how it will function. An academic statistics period defines the valid academic career and term combinations that the Consolidate Academic Statistics process uses to collect various academic statistics for students. An academic statistics period also defines the academic level and load rules and the statistics period type that the process uses.

The Consolidate Academic Statistics process locates the valid academic career and term combinations, based on the snapshot date for the academic statistics period. Valid academic career and term combinations can overlap each other and start and end independently yet can also roll up into one academic statistics period. You can even roll up different term values, such as semesters and quarters, into one academic statistics period.

In the following graphic, the semester and quarter terms from different academic careers roll up into one academic statistics period:



Example of an academic statistics period across terms

The vertical line defines the valid academic career and term combinations for the academic statistics period. The Consolidate Academic Statistics process gathers data for students in all academic career and term combinations that the line passes through. If a student has only one academic career in these terms, the process calculation is straightforward. However, if a student has multiple academic careers in these terms, such as how Student A has LAW and MBA academic careers, the process uses the academic career with the lowest primacy number to calculate the student's academic statistics. In this scenario, the process uses LAW as the primary academic career for Student A and converts the student's MBA units from quarter units to semester units.

Page Used to Set Up Academic Statistics Periods

Page Name	Definition Name	Navigation	Usage
Academic Statistics Period	ACAD_STATS_PERIOD	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Define Statistics Period, Academic Statistics Period	Describe an academic statistics period, including the statistics period type, academic load rule, consolidation trigger, and snapshot date.

Defining Academic Statistics Periods

Access the Academic Statistics Period page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Define Statistics Period, Academic Statistics Period).

Academic Statistics Period

Academic Statistics Period: CONT1 PeopleSoft University

***Description:** 2000 Year Data **Short Description:** 2000 Year

***Statistics Period Type:** SR

***Academic Load Rule:** Term Load Rule Applies

***Consolidation Trigger:** Consolidation Date

As of Date: 02/01/1999

*Academic Career	*Term		Term Type	*Snapshot Date		
BUSN	0350	1999 Sprng	Semester	02/01/1999	+	-
BUSN	0330	1998 Fall	Semester	09/20/1998	+	-
GRAD	0350	1999 Sprng	Semester	02/01/1999	+	-
GRAD	0330	1998 Fall	Semester	09/20/1998	+	-
LAW	0334	1999 Sprng	Quarter	02/01/1999	+	-
LAW	0332	1998 Fall	Quarter	10/01/1999	+	-
MEDS	0350	1999 Sprng	Semester	02/01/1999	+	-
MEDS	0330	1998 Fall	Semester	09/20/1998	+	-
UGRD	0350	1999 Sprng	Semester	02/01/1999	+	-
UGRD	0330	1998 Fall	Semester	09/20/1998	+	-

Academic Statistics Period page

Setting Up Academic Statistics Periods

Description and Short Description

Enter a description and short description for this academic statistics period. The system uses these descriptions on various pages to identify this academic statistics period.

The system also uses these descriptions for the header record of the NSC Extract report. The NSC requires that the header record of the extract include the academic term for the reported data, such as spring 2001 or fall 2001. Be sure to include this information in the descriptions as necessary. For NSC academic statistics periods, use descriptions such as *Fall 2001-1st NSC Run*, *Fall 2001-2nd NSC Run*, and *Fall 2001-3rd NSC Run* so that your institution can distinguish between the numerous runs of the NSC Extract report. The detailed descriptions are especially useful if you are running the NSC Extract process multiple times within the same reporting period. By specifying, on the Consolidated Statistics page, the academic statistics period used as the source for the previous NSC extract, you can easily distinguish between the statistics of the previous NSC extract and the next NSC extract.

Statistics Period Type

Select a statistics period type, which is a descriptor of an academic statistics period. The statistics period type identifies the type of reporting requirement for which you are using this academic statistics period. For example, you might have defined the statistics period type *IP* for IPEDS reporting, *N* for NSC reporting, and *SR* for the Student Record Census report. Because the statistics period type can affect the results of the Consolidate Academic Statistic process and the reports derived from these results, be sure that you select a statistics period type that meets your reporting needs.

Academic Load Rule

Select the academic load rule for the system to use when consolidating academic statistics. The Consolidate Academic Statistics process (SRPCCONP) uses your selection to calculate each student's academic load: full-time, half-time, part-time.

Term Load Rule Applies: When you run the Consolidate Academic Statistics process for an academic statistics period in which you have set this field to *Term Load Rule Applies* and the Load Determination field on the Level/Load Rules Table page to *Units*, the Consolidate Academic Statistics process uses the defined academic load rules from the Academic Level Table page to calculate a student's academic load, NSC academic load, and financial aid load. If you have set the Load Determination field on the Level/Load Rules Table page to *manual* or *default*, the Consolidate Academic Statistics process uses the student's career-term record or the value you enter in the Default Academic Load field, respectively, to calculate the student's academic loads, regardless of the setting for this field.

Contiguous Terms: Contiguous terms are consecutive terms in which you combine academic load information. Use this option for your academic load rule when you are combining student career-term records for consecutive terms. When you run the Consolidate Academic Statistics process for an academic statistics period in which you have set this field to *Contiguous Terms*, the Consolidate Academic Statistics process uses the defined contiguous-term academic load rules from the Statistics Period Load page to calculate a student's academic load, NSC academic load, and financial aid load. Thus, the process is able to accurately reflect each student's academic load for the combined terms.

For example, if 12 units equals a full-time academic load for an individual-term academic load rule, but you want to combine two consecutive terms during the Consolidate Academic statistics process, indicate on the Statistics Period Load page that 24 units equals a full-time academic load. If you do not define contiguous-term academic load rules, the Consolidate Academic Statistics process will report anyone with 12 or more units as full-time for that academic statistics period, which might not accurately reflect your data.

Consolidation Trigger

Select from the following choices the consolidation trigger to instruct the Consolidate Academic Statistics process which snapshot date to use. The snapshot date is the date that the process uses to locate the valid academic career and term combinations for this academic statistics period.

Note. If you select a consolidation trigger of *As of Date* or *As of Today*, the Consolidate Academic Statistics process takes the class start and end dates for all classes in which the student is actively enrolled and compares it to the snapshot date to determine if a student's class units should count towards her or his academic level and load calculation.

As of Date: Select to have the Consolidate Academic Statistics process base the snapshot date on the date in the *As of Date* field.

As of Today: Select to have the Consolidate Academic Statistics process base the snapshot date on the current system date when you run the process.

Consolidation Date: Select to have the Consolidate Academic Statistics process base the consolidation date on the date in the *As of Date* field.

When you select this option, a grid in the lower portion of the page appears for you to specify multiple academic career and terms combinations for which to take numerous snapshot dates. The snapshot dates listed on each row in the grid are the actual dates that the Recurring Term Snapshot process (SRPCCONU) *must* be run to calculate the statistics for all students active in that academic career and term combination.

The Recurring Term Snapshot process retrieves the STDNT_CAR_TERM information for each student active in the specified academic career and term combination as of the specified snapshot date for the corresponding row in the grid. The process stores these values in a temporary holding table called the PS_STDNT_CARTRM_PD table.

After the Recurring Term Snapshot process retrieves data for all rows listed in the grid, you must then run the Consolidate Academic Statistics process (SRPCCONP), which uses the date in the *As of Date* field as the effective date for all records that it generates. For the process to complete for a student, the student must be active in the specified academic career for which you are running the process and have records in the temporary holding table (PS_STDNT_CARTRM_PD).

As of Date

This field becomes available when you select *As of Date* or *Consolidation Date* in the Consolidation Trigger field. If you select *As of Date* as your consolidation trigger, the Consolidate Academic Statistics process uses this date as the snapshot date. If you select *Consolidation Date* as your consolidation trigger, the Consolidate Academic Statistics process uses the date in this field as the effective date for all records that it generates. The date in this field must be after the latest snapshot date in the grid in the lower portion of this page. This ensures that the academic statistics for all of the academic career and term combinations have been gathered and stored in the temporary holding table prior to consolidation.

Defining Valid Academic Career, Term, and Snapshot Date Combinations

When you define an academic statistics period to have *Consolidation Date* for its *consolidation trigger*, the system displays a grid in the lower portion of that page for you to enter the specific academic career, term, and snapshot date combinations to include in this academic statistics period. When you run the Take Recurring Term Snapshot process, it accepts as valid only the combinations on this grid for the given academic statistics period. The process gathers the most current statistics on students active in these academic career and term combinations as of the run date, then stores this data in a temporary holding table (PS_STDNT_CARTRM_PD) for future consolidation through the Consolidate Academic Statistics process.

To gather statistics that reflect different times of the year, you must run the Take Recurring Term Snapshot process on a regular basis because the statistics themselves are based on the run date, not the snapshot date.

For example, perhaps you have a fall semester and a spring semester for each of your academic careers and you want to combine the historic academic statistics for all of these academic career and term combinations so that you have year-long academic statistics for your entire academic institution.

In the grid, indicate that you want to take one snapshot in the fall term and one snapshot in the spring term for each academic career. Set the academic statistics period to a consolidation mode of *insert* so that you do not overwrite the data in the temporary holding table on subsequent runs of the Take Recurring Term Snapshot process.

On or shortly following each snapshot date for all of the academic career and term combinations listed for the academic statistics period, run the Take Recurring Term Snapshot process (through the Consolidated Statistics page) to capture the data current as of the run date for these academic career and term combinations. The process writes the data to the temporary holding table.

After running the Recurring Term Snapshot process for all of the academic career and term combinations listed for the academic statistics period, run the Consolidate Academic Statistics process to consolidate the academic statistics for this academic statistics period. The process consolidates each student's academic statistics for all applicable rows in the temporary holding table.

Academic Career	Select the academic career that the Take Recurring Term Snapshot process will consider as part of a valid combination for this academic statistics period.
Term	Select the term within the academic career that the Take Recurring Term Snapshot process will consider as part of a valid combination for this academic statistics period.
Snapshot Date	Select the date that the Take Recurring Term Snapshot process should be run for this academic career and term combination. For the process to consider this academic career and term combination valid, the term must be in progress as of the specified date.

Note. If you select a consolidation trigger of *As of Date* or *As of Today*, the Consolidate Academic Statistics process takes the class start and end dates for all classes in which the student is actively enrolled and compares it to the snapshot date to determine if a student's class units should count towards her or his academic level and load calculation.

See Also

Chapter 46, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 1162

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Defining Academic Level and Load Rules

Chapter 16

(AUS) Setting Up Government Reporting

This chapter provides an overview of Australian government reporting and discusses how to:

- Set up Department of Education, Employment and Workplace Relations (DEEWR) reporting codes.
- Set up for collecting Applications and Offers data.
- Set up Higher Education Contribution Scheme (HECS) liability in Student Records.
- Set up Centrelink reporting.

See Also

Chapter 50, "(AUS) Generating Government Reports," page 1221

Understanding Australian Government Reporting

This section discusses the government departments that require higher education reporting.

Prerequisites

In order to generate required government reports, in addition to the setup covered in this chapter, you must set up these tables:

- Field of Study AUS
- Field of Education AUS
- Discipline Group Table AUS
- AOU Code Table AUS
- Program Code Table AUS
- Program Type Table AUS
- Level/Load Rules Table

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "(AUS) Setting Up Government Reporting," Setting Up Reporting Codes.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," (AUS) Defining Level Dependent Load Rules.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," (AUS) Setting Up Australian Academic Programs.

The Government Departments That Require Higher Education Reporting

DEEWR requires all institutions in Australia that receive funding from the Commonwealth government to provide statistical reports about programs offered, student enrollments and academic load, student liabilities under the Higher Education Loan Program (HELP), Commonwealth scholarships, enrollment and program completions, and application data.

The Australian Tax Office (ATO) also requires institutions to provide information about students and their HELP debts that are to be recovered through the taxation system. In a simple process for institutions, all returns are forwarded to DEEWR, which forwards the necessary information to the ATO.

Centrelink, an Australian Government Statutory Agency, requires institutions to provide continuous reporting about a student's study circumstances for all students in receipt of a Centrelink Payment.

See [Chapter 50, "\(AUS\) Generating Government Reports," page 1221](#).

Setting Up DEEWR Reporting Codes

This section provides an overview of DEEWR reporting codes and discusses how to:

- Set up institution codes.
- Set up DEEWR country codes.
- Map country codes to DEEWR country codes.
- Set up DEEWR language codes.
- Map language codes to DEEWR language codes.
- Set up DEEWR citizenship and residency codes.
- Set up DEEWR citizenship and residency mapping.
- Set up DEEWR processing.
- Set up level of education codes.

Understanding DEEWR Reporting Codes

To comply with the DEEWR reporting requirements, you use special DEEWR codes when reporting data. You map these DEEWR codes to the codes used in the PeopleSoft Campus Solutions system. In most cases, you need to set up the DEEWR codes only once. If DEEWR codes change, you must change the DEEWR setup to reflect those changes.

In some cases, the DEEWR codes are delivered as translate values for fields. It is important that you do not change these translate values unless there is a change in the DEEWR code.

Pages Used to Set Up DEEWR Reporting Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
DEEWR Institution Code (Department of Education, Employment, and Workplace Relations institution code)	SSR_INST_DEST	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Institution Code, DEEWR Institution Code	Define Higher Education Provider (HEP) codes for DEEWR reporting.
DEEWR Country Code Table (Department of Education, Employment, and Workplace Relations country code table)	SSR_CNTRY_TB2_DEST	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Country Code Table, DEEWR Country Code Table	Use the Standard Australian Classification of Countries (SACC) to define country codes. This is required for DEEWR reporting.
DEEWR Country Table (Department of Education, Employment, and Workplace Relations country table)	SSR_CNTRY_TBL_DEST	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Country Table, DEEWR Country Table	Map PeopleSoft country codes to DEEWR country codes for DEEWR reporting.
DEEWR Language Code Table (Department of Education, Employment, and Workplace Relations language code table)	SSR_LANG2_DEST	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Code Table, DEEWR Language Code Table	Define language codes for DEEWR element 348.
DEEWR Language Table (Department of Education, Employment, and Workplace Relations language table)	SSR_LANG_DEST	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Table, DEEWR Language Table	Map PeopleSoft language codes to DEEWR language codes defined for element 348.

Page Name	Definition Name	Navigation	Usage
DEEWR Unit Status Indicator (Department of Education, Employment, and Workplace Relations unit status indicator)	SSR_DEST_ELEM_355	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Unit Status Indicator, DEEWR Unit Status Indicator	Define unit of study completion status codes for DEEWR element 355.
DEEWR Unit Status Mapping (Department of Education, Employment, and Workplace Relations unit status mapping)	SSR_MAP_355	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Unit Status Mapping	Map grades to unit of study completion status codes.
DEEWR Citizen/Res Indicator (Department of Education, Employment, and Workplace Relations citizen/resident indicator)	SSR_DEST_ELEM_358	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Citizen/Res Indicator, DEEWR Citizen/Res Indicator	Define the DEEWR Citizen/Res Indicator codes for element 358. The system includes these codes in the Student Help files.
DEEWR Citizen/Resident Mapping (Department of Education, Employment, and Workplace Relations citizen/resident mapping)	SSR_MAP_358	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Citizen/Resident Mapping, DEEWR Citizen/Resident Mapping	Map citizenship status codes to DEEWR citizen/resident codes for element 358. The system assigns the mapped citizenship status codes to the imported person data.
DEEWR Reporting Setup (Department of Education, Employment, and Workplace Relations setup)	SSR_DEST_SETUP	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Reporting Setup, DEEWR Reporting Setup	Allocate address usages for reporting address elements to DEEWR and assign reporting years to the institution for DEEWR submissions. This allows the system to track the submission number for half-year reporting.
DEEWR Level of Education VET (Department of Education, Employment, and Workplace Relations Level of Education Vocational Education and Training)	SSR_DEST_ELEM_563	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Level of Education VET, DEEWR Level of Education VET	Define level of education codes.

Setting Up Institution Codes

Access the DEEWR Institution Code page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Institution Code, DEEWR Institution Code).

DEEWR Institution Code

Undergraduate Institution Code: 1016

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900
 *Status: Active
 *Description: Griffith University
 Short Description: Griffith U ☒ HEIMS HEP Code
 DEEWR Credit Basis: 0100 DEEWR Provider Type VET: 10

DEEWR Institution Code page

These codes are provided by DEEWR. Set up codes for all your institutions, and for institutions from which you receive transfer students.

DEEWR Credit Basis
(Department of Education,
Employment, and Workplace
Relations credit basis)

Enter the value to be reported for DEEWR Element 561 Credit-Basis, if the institution code is assigned to manual course credits processed for a student.

This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.

DEEWR Provider Type VET
(Department of Education,
Employment, and Workplace
Relations provider type
Vocational Education and
Training)

Enter the value to be reported for DEEWR Element 564 Provider Type, if the institution code is assigned to manual course credits processed for a student.

This field is optional. If the institution does not offer VET related study, you do not have to enter a value.

This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.

Setting Up DEEWR Country Codes

Access the DEEWR Country Code Table page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Country Code Table, DEEWR Country Code Table).

Setting up the country codes for DEEWR reporting requires that you enter the DEEWR country codes into your system, then map each DEEWR country code to the appropriate country code defined in the system. Map country codes to DEEWR country codes on the DEEWR Country Table page.

Mapping Country Codes to DEEWR Country Codes

Access the DEEWR Country Table page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Country Table, DEEWR Country Table).

DEEWR Country Table

Effective Date: 01/01/2000

Customize | Find | View 100 |  First  1-20 of 223  Last

Country		DEST Country Code			
ABW 	Aruba	8403 	Aruba		
AFG 	Afghanistan	7201 	Afghanistan		
AGO 	Angola	9201 	Angola		
AIA 	Anguilla	8401 	Anguilla		
ALB 	Albania	3201 	Albania		
AND 	Andorra	3101 	Andorra		
ANT 	Netherlands Antilles	8418 	Netherlands Antilles		
ARE 	United Arab Emirates	4216 	United Arab Emirates		
ARM 	Armenia	7202 	Armenia		
ATA 	Antarctica	1600 	Antarctica, nfd		

DEEWR Country Table page

Note. Set up DEEWR country code values on the DEEWR Country Code Table page.

Country Select a PeopleSoft defined country code.

DEST Country Code Enter the equivalent DEEWR defined country code.

Setting Up DEEWR Language Codes

Access the DEEWR Language Code Table page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Code Table, DEEWR Language Code Table).

Setting up the language codes for DEEWR reporting requires that you enter the DEEWR language codes into your system, then map each DEEWR language code with the appropriate language code in the system. Map language codes to DEEWR language codes on the DEEWR Language Table page.

Mapping Language Codes to DEEWR Language Codes

Access the DEEWR Language Table page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Table, DEEWR Language Table).

DEEWR Language Table

Institution: PSAUS PeopleSoft Australia Uni

Effective Date: 01/01/2000

Customize Find View All First 1-7 of 7 Last					
Language Code		DEEWR Language Code			
BO	Bengali	5201	Bengali		
CM	Chinese (Mandarin)	7104	Mandarin		
EN	English	0001	English		
KO	Korean	7301	Korean		
PO	Portuguese	0060	Portuguese		
RU	Russian	3402	Russian		
SI	Swahili	5202	Gujarati		

DEEWR Language Table page

Note. Set up DEEWR language code values on the DEEWR Language Code Table page.

Language Code Select a PeopleSoft defined language code.

DEEWR Language Code Enter the equivalent DEEWR language code.

Setting Up DEEWR Citizenship and Residency Codes

Access the DEEWR Citizen/Res Indicator page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Citizen/Res Indicator, DEEWR Citizen/Res Indicator).

DEEWR citizenship and residency codes are provided by DEEWR. Map citizenship codes to DEEWR citizen/resident codes on the DEEWR Citizen/Resident Mapping page.

Setting Up DEEWR Citizenship and Residency Mapping

Access the DEEWR Citizen/Resident Mapping page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Citizen/Resident Mapping, DEEWR Citizen/Resident Mapping).

DEEWR Citizen/Resident Mapping

Effective Date: 02/10/2004

[Customize](#) | [Find](#) | [View All](#) |

First 1-6 of 6 Last

Citizenship Status	DEEWR Citizen/Resident Code			
Native	2	NZ Citizen		
Alien Permanent	8	Permanent Humanitarian Visa		
Alien Temporary	4	Temporary Resident		
Citizen	1	Australian Citizen		
Permanent Resident	3	Permanent Resident		
Foreign ID Card Holder	5	Resident Outside Aus		

DEEWR Citizen/Resident Mapping page

Note. Set up DEEWR citizenship and resident code values on the DEEWR Citizen/Res Indicator page.

Citizenship Status Select a PeopleSoft defined citizenship status code.

DEEWR Citizen/Resident Code Enter the equivalent DEEWR citizen/resident code.

Setting Up DEEWR Processing

Access the DEEWR Reporting Setup page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Reporting Setup, DEEWR Reporting Setup).

Note. For each new collection year, you must access this page and enter a new reference year row.

DEEWR Reporting Setup

Academic Institution: PSAUS PeopleSoft Australia Uni

DEEWR University Code: 9998

***ID:** SFAUS000  Brown, Tamara T

Revisions File Reference: 2000002

Revisions Submission Number: 2

Address Usages

Postal Address: D_POSTAL  DEEWR Postal Location

Permanent Address: D_PERM  DEEWR Permanent Location

Term Address: D_RESID  DEEWR Residential Location

DEEWR Reference Year

***Reference year:** 2010  

Find | View All First  1 of 6  Last

DEEWR Submission Counter

Find | View All First  1-2 of 2  Last

First Half Year	
Enrollment Submission Nbr:	1
Scholarship Submission Nbr:	1
OS - Help Submission Nbr:	1
Past Course Completion Nbr:	1
Second Half Year	
Enrollment Submission Nbr:	1
Scholarship Submission Nbr:	1
OS - Help Submission Nbr:	1

DEEWR Reporting Setup page

Address Usages

Postal Address

Select a value to determine the data for address elements 406, 407, 409, 466, 467, 468, 728.

DEEWR AO, DU, RD and CS Extracts report one or more of these elements.

Permanent Address Select a value to determine the data for address elements 320, 410, 411, 413, 469, 470 and 471.

DEEWR AO, EN, DU and RD Extracts report one or more of these elements.

Term Address Select a value to determine the data for address element 319.

DEEWR EN Extract reports this element.

DEEWR Submission Counter

DEEWR University Code Enter your institution's DEEWR university code.

This code is used in the file name for your submissions.

ID Enter the ID for your institution's DEEWR contact.

Note. Make sure this individual has a BUSN and FAX phone number entered in his or her contact record. The individual's name, phone, and fax numbers are reported on the Due file (DU) in the second registration identity record in elements 424 (contact name), 425 (contact telephone), and 426 (contact facsimile number).

Reference year Enter the collection year.

First Half Year and **Second Half Year** Enrollment Submission Nbr, Scholarships Submission Nbr, and OS – Help Submission Nbr indicate the number of times the institution has submitted the enrollments, scholarship and OS-HELP records to DEEWR.

The Past Course Completion Nbr indicates how many files have been submitted to DEEWR for the reference year. The system increments this number each time the DEEWR Submission Processing Extract runs for past course completions.

Note. The Past Course Completion Nbr field appears as a First Half Year submission only.

The DEEWR Submission process, which stamps records as submitted, increments these numbers by one each time that it runs.

The submission numbers are used to generate file extensions for the DEEWR reports (for example, HX4888EN.A11). The first digit of the .A11 extension is the half year, so this will be one or two. The second digit is the submission number, which can go from one to nine as multiple submissions are made during the half year period.

Setting Up Level of Education Codes

Access the DEEWR Level of Education VET page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, DEEWR Level of Education VET, DEEWR Level of Education VET).

The screenshot shows the 'DEEWR Level of Education VET' page. At the top, it says 'Level of Education Code: 411'. Below this is a table with the following details:

Level of Education Code		Find	View All	First	1 of 1	Last	
Effective Date:	07/01/2007	Status:	Active				
Description:	Advanced Diploma						
Short Description:	AdvDiploma						

DEEWR Level of Education VET page

Use this page to enter values for DEST Element 563 – Level of Education for Prior VET Study.

These values are then available in the Level of Education field on the Transfer Course Entry page, if the school type assigned to the credit has a DEST Credit Basis of 0200 Credit Offered for Prior VET Study.

Setting Up for Collecting Applications and Offers Data

This section provides an overview of Applications and Offers Data Collection and discusses how to:

- Set up an Applications and Offers profile.
- Set up Applications and Offers element mapping.
- Set up Applications and Offers element defaults.
- Set up funding source codes.
- Set up Element 702 mapping.

Understanding Applications and Offers Data Collection

To meet the DEEWR Applications and Offers Data Collection requirements, you use the Applications and Offers (SSR_DEEWR_AO) process.

The process generates three files— Applications Details, Preference Details, and Offer Details.

An applicant is included in the data collection only if an admissions application exists for the applicant. The Preference Details file includes a record for each program within collection scope for which an applicant has applied. The Offer Details file includes only those programs for which an applicant has been made an offer—it can therefore contain zero records.

The scope of Applications and Offers Collection Data requirements excludes certain categories of application, for example:

- Cancelled by an institution as duplicates, or because the applicant is known to be deceased or has falsified documentation, or for other administrative reasons.
- Registrations for non-commencing students following periods of lapsed enrollment, leave of absence, or deferment.

See [Chapter 50, "\(AUS\) Generating Government Reports," Generating the Applications and Offers Files, page 1253.](#)

Pages Used to Set Up Applications and Offers Profile Parameters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Profile	SSR_DEEWR_AO_PRFL	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Profile	Define key parameters to determine the selection of applicants to be included in the Applications & Offers data collection.
Element Mapping	SSR_DEEWR_AO_ELEMP	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Element Mapping	Define program action and reason combinations to define the scope of each of the files in the Applications & Offers data collection and assist in determining the value to report for elements 723 and 701. Element 710 is reported by identifying the test ID and component that captures an International Baccalaureate score.
Element Defaults	SSR_DEEWR_AO_ELEDF	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Element Defaults	Specify either a constant or default value for a subset of elements in the Applications and Offers data collection. Where applicable, a constant value is reported for all records in the file. A default value is reported if there is no data found.

Page Name	Definition Name	Navigation	Usage
Funding Source	SSR_DEEWR_FUND_SRC	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Funding Source, Funding Source	Define funding source codes that can be assigned to the applicant or student to record the type of place that the applicant is offered or for which the student is currently enrolled.
Element 702 Mapping	SSR_DEEWR_E702_MAP	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Element 702 Map, Element 702 Mapping	Map the year 12 result type codes for Element 702 to the applicable state code.

Setting Up an Applications and Offers Profile

Access the Profile page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Profile).

Profile

Element Mapping

Element Defaults

Academic Institution:

PSAUS

PeopleSoft Australia Uni

Profile:

AO_CD1

AO Profile

Find | View All

First

1 of 1

Last

Effective Date:

07/01/2009

31

Status:

Active

Description:

CSP UGRD Domestic

Description:

CSP UGRD Domestic Applicants

Application Center

Find | View All

First

1 of 1

Last

ADMS

Central Student Admissions

Admit Type

Find | View All

First

1 of 1

Last

Application Method

Find | View All

First

1 of 2

Last

WWW

Web Application

Citizenship

Find | View All

First

1 of 4

Last

1

Australian Citizen

Course Of Study Type Code

Find | View All

First

1 of 8

Last

08

Bachelor's Graduate Entry

Profile page

Use this page to define key selection parameters relevant to the data collection.

Application Center, Admit Type, and Application Method

Select a value in these fields if applicants included within the scope of the data collection are identifiable by an application centre, admit type, or application method on the admissions application.

Citizenship and Course of Study Type Code

The Applications and Offers Data Collection requirements include specific citizenship and course of study type values within scope. You must select all the required values for DEEWR Citizenship Element 358 and DEEWR Course of Study Type Element 310 that are applicable to the scope of the collection.

Setting Up Applications and Offers Element Mapping

Access the Element Mapping page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Element Mapping).

Profile
Element Mapping
Element Defaults

Academic Institution:PSAUSPeopleSoft Australia Uni

Profile:AO_CD1

Element Mapping
Find | View All
First 1 of 1 Last

Effective Date:07/01/2009

File Scope Mapping
Customize | Find | View 3 |
First 1-4 of 4 Last

Program ActionApplication Status

	*Program Action	Description	Action Reason	Description		
1	ADMT	Admit			+	-
2	DISC	Discontinuation	DEAT	Deceased	+	-
3	RECN	Reconsideration			+	-
4	WADM	Administrative Withdrawal			+	-

Element 723 Mapping
Customize | Find | View All |
First 1-3 of 3 Last

Program ActionE723 Response Code

	*Program Action	Description	Action Reason	Description		
1	DEFR	Defer Enrollment			+	-
2	DEIN	Intention to Matriculate			+	-
3	WAPP	Applicant Withdrawal			+	-

Element 701 Mapping
Customize | Find | View All |
First 1 of 1 Last

Program ActionE701 Application Status

	*Program Action	Description	Action Reason	Description		
1	WAPP	Applicant Withdrawal			+	-

International Baccalaureate Score
Customize | Find | View All |
First 1 of 1 Last

	*Test ID	Description	*Test Component	Description		
1	IB	International Baccalaureate	COMP	Composite	+	-

Element Mapping page

Use this page to determine the value of a number of elements that must be reported and to further refine the scope of the collection by excluding a subset of applicants and distinguishing between preferences and offers.

File Scope Mapping

Here are examples of the Program Action and Application Status tabs:

File Scope Mapping					
Program Action		Application Status			
	*Program Action	Description	Action Reason	Description	
1	ADMT	Admit			+ -
2	DISC	Discontinuation	DEAT	Deceased	+ -
3	RECN	Reconsideration			+ -
4	WADM	Administrative Withdrawal			+ -

Element Mapping page: File Scope Mapping, Program Action tab

File Scope Mapping					
Program Action		Application Status			
	*Application Status	Description			
1	OF	Offered			+ -
2	EX	Excluded			+ -
3	NO	Not Offered			+ -
4	EX	Excluded			+ -

Element Mapping page: File Scope Mapping, Application Status tab

Use these tabs to set up combinations of program action and reason(s) that affect:

- Whether the applicant is included in or excluded from the data collection.
- If included, whether the applicant is reported in Application Details and Preference Details file but not in the Offer Details file.

Enter an Application Status value only for program actions and (optional) reasons that are relevant to the collection scope.

An example of a program action that does not require a mapping is DATA (Data Change). A program action of DATA is typically used to change an attribute on the application or program that is not relevant to the scope of the collection.

Application Status

Values are:

EX: Excluded

OF: Offered

NO: Not Offered

CO: Conditional

An example of mappings is:

- Discontinued/Deceased—Excluded
- Admit—Offered

- Reconsideration—Not Offered
- Conditional—Conditional

When you run the Applications and Offers (SSR_DEEWR_AO) process from the Applications and Offers File page, the process uses the file scope mapping as follows:

1. The process selects an application based on the criteria on the Profile setup page and the admit term(s) that you enter on the Applications and Offers File run control page.
2. The process uses program action and reason data from either the admissions application (if not matriculated) or the academic program/plan stack and tries to map to the program action and reason data in the File Scope Mapping group box.

The process searches in descending effective date and sequence order, as at the reference date on the run control page.

The process checks each effective dated row until a match is found, at which point it stops searching, or until all rows are processed.

3. If the applicant's program action and reason maps to a program action and reason in the File Scope Mapping group box (first tab), the process uses the application status (second tab) to determine whether the data is included or excluded from scope, and if included, whether the data for that program is output to the Offer Details file.

If no mapping is found between the applicant's program data and the data in the File Scope Mapping group box, the applicant is considered in scope for the Application Details and Preference Details files (because the applicant has an admissions application) but not the Offers Details file.

If you enter a program action without an action reason, all applicants with the specified program action are associated with the mapped application status, regardless of reason.

Note. Because the Applications and Offers process uses descending effective date order, any program action that rescinds an offer must be mapped to an application status of *NO* (Not Offered) to ensure the program is not included in the offer file. An example is the *RECN* (Reconsidered)—*NO* (Not Offered) row in the example page.

The *CO* (Conditional) application status in the example page has an equivalent meaning to *NO*. You do not have to enter a row for a conditional offer unless it might rescind a previous offer row. You can map the action reason(s) used for conditional offer to either *NO* or *CO*. The *CO* value is for transparency only.

Here are some examples of how the Applications and Offers process matches and reports data, using the data that appears in the Element Mapping page example:

<i>Applicant Data</i>	<i>What is Reported</i>
01 Jul 2009 APPL	An application exists and therefore the applicant is considered in scope and is reported in the Applicant Details and Preference Details files. No APPL row exists in the file scope mapping; because no match is found, the applicant is not reported in the Offer Details file.

Applicant Data	What is Reported
01 Jul 2009 APPL 02 Jul 2009 ADMT/29 03 Jul 2009 DEIN 05 Jul 2009 MATR 15 Jul 2009 PLNC 16 Jul 2009 DATA	Working backwards from 16 Jul, no match exists until the ADMT row. The process stops searching when it finds this match. Action reason 29 is irrelevant because, in the file scope mapping, ADMT has no related action reason. In file scope mapping, program action ADMT has an OF application status: the applicant is therefore reported in the Applicant Details, Preference Details, and Offer Details files.
01 Jul 2009 APPL 02 Jul 2009 ADMT/29 03 Jul 2009 MATR 15 Jul 2009 DISC/DEAT	Working backwards from 15 Jul, the process finds a match on the 15 Jul row and stops searching. In the file scope mapping, DISC/DEAT has an application status of EX: the applicant is <i>not</i> reported in any file.

Element 723 Mapping

Here are examples of the Program Action and E723 Response Code tabs:

Element 723 Mapping					
Program Action		E723 Response Code			
	*Program Action	Description	Action Reason	Description	
1	DEFR	Defer Enrollment			+ -
2	DEIN	Intention to Matriculate			+ -
3	WAPP	Applicant Withdrawal			+ -

Element Mapping page: Element 723 Mapping, Program Action tab

Element 723 Mapping					
Program Action		E723 Response Code			
	*E723 Response Code	Description			
1	3	Deferred the offer			+ -
2	1	Accepted the offer			+ -
3	2	Rejected the offer			+ -

Element Mapping page: Element 723 Mapping, E723 Response Code tab

That data that you set up here determines the value that is reported for Element 723 if the applicant is not enrolled in the reported program.

If the applicant is enrolled, a value of 1 (Accepted the offer) is reported regardless of the setup.

If no mapping is found, a value of 6 (Response unknown/not recorded) is reported.

If you do not enter an action reason for a program action, the process assumes all reasons for the program action.

Element 701 Mapping

Here are examples of the Program Action and the E701 Application Status tabs:

Element 701 Mapping				
Program Action		E701 Application Status		
	*Program Action	Description	Action Reason	Description
1	WAPP	Applicant Withdrawal		

Element Mapping page: Element 701 Mapping, Program Action tab

Element 701 Mapping				
Program Action		E701 Application Status		
	*E701 Application Status	Description		
1	2	Application Withdrawn		

Element Mapping page: Element 701 Mapping, E701 Application Status tab

The data that you set up here determines the value that is reported for Element 701.

The minimum recommended setup is for 2 (Applicant Withdrawn), but you can identify values for every program action. If set up a status of 2 only, all other program actions assume the reporting value of 1 (Current Application).

Note. A distinction exists between an applicant withdrawn for the purpose of element 701 and applications that are excluded from data collection. Programs with an E701 status of application withdrawn must be reported. To exclude applicants from all 3 files, assign the relevant program action/reason combinations in the File Scope Mapping group box not in the Element 701 group box.

International Baccalaureate Score

This mapping determines the test score and component relevant to the IB Aggregate score reported at Element 710.

Setting Up Applications and Offers Element Defaults

Access the Element Defaults page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Applications & Offers Profile, Element Defaults).

Profile

Element Mapping

Element Defaults

Academic Institution: PSAUS PeopleSoft Australia Uni

Profile: AO_CD1

Element Defaults Find | View All First 1 of 1 Last

Effective Date: 07/01/2009

Elements		Customize	Find	View All	First	1-7 of 7	Last
	*Element	Description	Constant Value	Default Value			
1	314	Date Of Birth		19010101	+	-	
2	316	ATSI Code		9	+	-	
3	327	Basis Of Admission			+	-	
4	348	Language Spoken at Home		9999	+	-	
5	493	Highest Educational Partic.		090000	+	-	
6	702	Year 12 Result Type Code		10	+	-	
7	724	Sector Code	1		+	-	

Element Defaults page

Defaults are used to assist in the value of some elements that are reported in the Applications and Offers Data Collection. Only a subset of elements can be assigned either a default or constant value, because the concept is not applicable to all elements in the collection.

If you assign a constant value, all records in the data extracts are reported with the same value. If you assign a default value, the value is reported only if no data is found for the student for that particular element. You can assign a default value of blank—a blank value is output to file, highlighting the missing data.

Note. The only element that acknowledges a constant value is E724 Sector Code.

For all elements except Element 724, use the Default Value field to assign a default value to be reported if no data is sourced for the applicant.

This table lists the DEEWR Equivalent values where relevant:

Element	DEEWR Equivalent
314: Date of Birth	19010101
316: Aboriginal & Torres Strait Islander Code	9
348: Language Spoken at Home	9999
493: Highest Educational Participation Prior to Commencement	090000
702: Year 12 Result Type Code	10

Element 724

Release 9.0 customers can assign either a constant value or a default value if no funding source is assigned to the applicant with a mapping to Sector Code.

Release 8.9 customers must assign a constant value to the profile.

Setting Up Funding Source Codes

Access the Funding Source page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Funding Source, Funding Source).

Funding Source

Funding Source: CSP

Funding Source

Find | View All First 1 of 1 Last

Effective Date: 01/01/2009

Effective Status: Active

Description: Commonwealth Supported Place

Formal Description: Commonwealth Supported Place

Sector Code: 1 Commonwealth Supported

Funding Source page

Use this page to define funding source codes that can be assigned to the applicant or student to record the type of place that the applicant is offered or for which the student is currently enrolled.

- Funding Source

This user-defined code indicates the category of the place that the student is offered.

The Funding Source field appears on the AUS Student Program, Application Regional, Program Addition, and Quick Admit-Program/Plan pages.
- Sector Code

The sector code represents DEEWR Element 724. If the funding source is relevant to the Applications and Offers data collection, enter a value in this field. If not, the field can be blank. You can map multiple funding source values to a single sector code for reporting purposes.

Setting up Element 702 Mapping

Access the Element 702 page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Element 702 Map, Element 702 Mapping).

Element 702 Mapping							
Element 702 Mapping				Customize Find View All First 1-8 of 8 Last			
*Element 702 Code	Description	*Country	Description	*State	Description		
01	ACT Year 12 Certificate	AUS	Australia	ACT	Austl. Cap. Terr.	+	-
02	New South Wales HSC	AUS	Australia	NSW	New South Wales	+	-
03	QLD Certificate of Education	AUS	Australia	QLD	Queensland	+	-
04	SANT Certificate of Education	AUS	Australia	SA	South Australia	+	-
04	SANT Certificate of Education	AUS	Australia	NT	Northern Territory	+	-
05	TAS Certificate of Education	AUS	Australia	TAS	Tasmania	+	-
06	VIC Certificate of Education	AUS	Australia	VIC	Victoria	+	-
07	WA Certificate of Education	AUS	Australia	WA	Western Australia	+	-

Element 702 Mapping page

Use this page to map the year 12 result type codes for Element 702 to the applicable state codes.

The Applications and Offers process uses this mapping to report the state in which a student completed or is completing year 12.

Element 702 Code

Enter the Australian Year 12 result type code values for DEEWR Element 702 and map each value to the relevant state.

You do not have to enter codes for values that are not directly attributable to a State, for example, International Baccalaureate.

The Element 702 code that is reported to DEEWR is based on the value in the State field on the CHESN Year 12 page, if the student attended year 12 in the year that is designated as *current* for the DEEWR Applications and Offers Data collection—the year immediately prior to the reference year for which you run the Applications and Offers process.

See [Chapter 50, "\(AUS\) Generating Government Reports," Generating the Applications and Offers Files, page 1253.](#)

Setting Up HECS Liability in Student Records

This section provides an overview of HECS liability in Student Records and discusses how to:

- Define cohort year.
- Set up HECS band IDs.
- Map liability status codes.
- Map work experience to HECS liability codes.
- Set up aggregated EFTSL values.

Understanding HECS Liability in Student Records

The HECS is an equitable way of ensuring that students contribute to the cost of their higher education. HECS provides a loan to students that is interest free, with deferred income contingent repayment. The purpose of HECS in the system is to determine how much of the tuition a student should pay, and then to collect the payments. To do this, HECS Band IDs must be associated with courses so that when students enroll, the system can calculate their contributions based on the HECS Band and their level/load (EFTSL). HECS Band IDs are associated with academic subjects, but you can override them at the course catalog level. All of the HECS processing (tuition calculation) occurs in the Student Financials application.

Pages Used to Set Up HECS Liability

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Cohort Year	SSR_COHORT_YR_AUS	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Cohort Year, Cohort Year	Define the cohort years that your institution will use to create cohorts of students commencing a program in a specific year.
HECS Band ID Setup	SSR_HECS_BAND_AUS	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, HECS Band ID Setup, HECS Band ID Setup	Set up the HECS Band IDs.
Map Liability Status	SSR_HECS_MAP_TO	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Map Liability Status, Map Liability Status	Map pre-2005 liability status codes to post -2005 student status codes. The system uses this mapping when you term-activate a student who was active before 2005.
Map Work Exp to Liability (map work experience to liability)	SSR_WORK_EXP_MAP	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Map Work Exp to Liability, Map Work Exp to Liability	Define liability status mappings for work experience in industry class enrollments.
Aggregated EFTSL AUS	SSR_EFTSU_AGG	Set Up SACR, Foundation Tables, Reporting Codes, Aggregated EFTSL AUS, Aggregated EFTSL AUS, Aggregated EFTSL AUS	Define the aggregated EFTSL values that will be available on the Academic Program Australia page.

Defining Cohort Years

Access the Cohort Year page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Cohort Year, Cohort Year).

Cohort Year				
Customize Find View All First 1-3 of 3 Last				
*Cohort Year	*Description	Short Description		
2004	Cohort 2004	2004	+	-
2005	Cohort 2005	2005	+	-
2006	Cohort 2006	2006	+	-

Cohort Year page

A cohort year designates a group of students that all begin a particular course of study the same year.

Setting up cohort years enables your institution to specify the student contribution amounts and tuition fees for the student cohorts according to the guidelines in the Higher Education Support Act of 2003.

Cohort Year Enter the years in which your institution wants to group students.

See Also

[Chapter 26, "Managing Student Programs, Plans, and Subplans," \(AUS\) Entering Australia-Specific Student Program Information, page 657](#)

[Chapter 32, "Processing Class Enrollment Transactions," \(AUS\) Entering HECS Data, page 781](#)

[Chapter 32, "Processing Class Enrollment Transactions," Adding or Updating Quick Enrollment Requests, page 756](#)

Setting Up HECS Band IDs

Access the HECS Band ID Setup page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, HECS Band ID Setup, HECS Band ID Setup).

Note. Fixed HECS is used for students who enrolled before January 1, 1997, and are charged a single rate for all their subject areas.

The HECS Band ID determines the amount of tuition that an institution can charge per course.

The DEEWR sets up guidelines as to which band a subject should be placed. You associate HECS Band IDs with academic subjects. Courses that fall under that academic subject are automatically assigned the HECS Band ID of the academic subject; however, you can override the HECS Band ID for individual courses if required.

See Also

[Chapter 6, "Setting Up the Course Catalog," Defining Course Offerings, page 100](#)

[Chapter 32, "Processing Class Enrollment Transactions," \(AUS\) Entering HECS Data, page 781](#)

Mapping Liability Status Codes

Access the Map Liability Status page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Map Liability Status, Map Liability Status).

Map Liability Status					
Customize Find View All  First  1-4 of 4  Last					
*Liability Status	Description	*Map to New Liability Status	Description		
10 	Deferred all/part of liability	110 	HECS-HELP Deferred pre2005		
11 	Paid full liability w discount	111 	HECS-HELP Paid w/disc. pre2005		
12 	Paid full liability w/o discount	112 	Paid full w/o discount pre2005		
22 	Fee-paying overseas student	311 	Fee-paying overseas Sponsored		

Map Liability Status page

A liability status defines a student's payment options (for example, deferred or pay up front) and is assigned to each student in the term activation component.

The liability status codes are defined by DEEWR. In 2005, the codes were changed from two-digit to three-digit codes. For historical purposes, your system must maintain the two-digit codes.

Liability Status Select the two-digit liability status code.

Map to New Liability Status Select the equivalent three-digit liability status code.

See Also

[Chapter 30, "Maintaining Student Career Term Records," \(AUS\) Setting Student Term Default Values, page 704](#)

[Chapter 32, "Processing Class Enrollment Transactions," \(AUS\) Entering HECS Data, page 781](#)

[Chapter 32, "Processing Class Enrollment Transactions," Adding or Updating Quick Enrollment Requests, page 756](#)

Mapping Work Experience to HECS Liability Codes

Access the Map Work Exp to Liability page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, Map Work Exp to Liability, Map Work Exp to Liability).

Map Work Exp to Liability

Work Experience Indicator: Wholly Work Exp - Exempt

Customize Find View All  First  1-3 of 3  Last					
*Liability Status	Description	*Map to New Liability Status	Description		
201 	HECS-HELP Deferred.	262 	Work Experience in Industry		
202 	Paid full liability w/discount	262 	Work Experience in Industry		
230 	FEE-HELP Def Award/Enabling	271 	WEI -- No charge for fees.		

Map Work Exp to Liability page

WEI is work that is done as a part of, or in connection with, a course of study undertaken with a higher education provider (HEP) and the purpose of which is to obtain work experience relevant to the course of study.

The work experience can be a unit of study that is directed or supported by your institution for which the student pays a contribution amount or tuition fees, or it can be work experience not directed or supported by an institution for which the student pays no contribution or fees.

Work Experience Indicator When setting up a new indicator, select the appropriate value.

The work experience indicators are:

- *Not Wholly Work Experience:* The HEP directs the learning and performance of the student. The work experience is treated as a normal unit, and the student is charged appropriately.
- *Wholly Work Exp - Exempt:* The HEP does not provide direction or support for the work experience, and the unit of study is exempt from student contributions and tuition fees.
- *Wholly Work Exp with Charge:* The HEP supports the learning and performance of the student and may charge the student contribution amounts and tuition fees.

Liability Status Select a liability status that your institution has entered as a default status for a course.

Map to New Liability Status Select the equivalent liability status for students who have enrolled in the course for WEI.

Setting Up Aggregated EFTSL Values

This section provides an overview of EFTSL Calculation and discusses how to set up Aggregated EFTSL values.

Understanding EFTSL Calculation

EFTSL is a measure of the study load, for one year, of a student undertaking a course of study on a full time basis.

To enable DEEWR to make accurate comparisons between institutions, student loads must be universally expressed in EFTSL values. One EFTSL is the amount of study that a full time student is expected to take in one year.

DEEWR requires that institutions report EFTSL values for each student, each year. A student's total EFTSL for a year is equal to the sum of EFTSL values for each term for which the student is enrolled in that year. The student's total EFTSL value for each term is the sum of the EFTSL for each class in which the student is enrolled in that term. The EFTSL value for each class is determined by dividing the number of units for each class in which the student is enrolled that term by the total annual units for that program of study.

This example illustrates the calculation of EFTSL values for a student for two terms:

Example Class	Term	Units
Accounting 101	1	15
Economics 101	1	15
English 201	1	15
Music 105	1	15
		Total term units: 60
Engineering 201	2	30
Economics 102	2	15
Laws 201	2	15
		Total term units: 60
		Total annual units for program of study: 120

To calculate the EFTSL for each class, the number of units for each class is divided by the annual units for the program of study:

Accounting 101 EFTSL = [15 units for the class] / [120 units for the annual program of study] = 0.125

Engineering 501 EFTSL = [30 units for the class] / [120 units for the annual program of study] = 0.25

This table lists the EFTSL for each class in the example:

Class	EFTSL
Accounting 101	0.125
Economics 101	0.125
English 201	0.125
Music 105	0.125
Engineering 201	0.25
Economics 102	0.125
Laws 201	0.125
<i>Total Annual EFTSL</i>	<i>1.00</i>

Note. For classes that are offered on an annual basis, the EFTSL value must be split so that it represents the load attributed to the class in each term. For example, an annual class that is assigned 30 units might have an EFTSL of 0.25. The term EFTSL for the class would be 0.125 for a two-term year.

The term total units do not need to be equal for each term. For example, if the annual load is 120, you could have 75 units from the first term and 45 units for the second term.

Setting Up Aggregated EFTSL Values

Access the Aggregated EFTSL AUS page (Set Up SACR, Foundation Tables, Reporting Codes, Aggregated EFTSL AUS, Aggregated EFTSL AUS, Aggregated EFTSL AUS).

Aggregated EFTSL AUS

Aggregated EFTSL: 30

Find | View All

First 1 of 1 Last

Effective Date:



Status:




***Description:**

Short Description:

Aggregated EFTSL AUS page

DEEWR requires that institutions report EFTSL values for each student, each year. A student's total EFTSL for a year is equal to the sum of EFTSL values for each term for which he or she is enrolled in that year. The student's total EFTSL value for each term is the sum of the EFTSL for each class in which the student is enrolled in that term. The EFTSL value for each class is determined by dividing the number of units for each class in which the student is enrolled that term by the total annual units for that program of study.

Aggregated EFTSL values are the total number of EFTSL values that a student accumulates while completing a program of study. This value is used to derive the element 350 Course of Study Load on the Course of Study file.

DEEWR provides the codes for aggregated EFTSL. You must enter the codes (in tenths) into the system so that you can show the equivalent course of study load (program load). For example, the program value of 30 is equal to 3 years EFTSL.

You assign an aggregated EFTSL to each of your programs on the Academic Program AUS page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," (AUS) Setting Up Australian Academic Programs

Setting Up Centrelink Reporting

This section discusses how to

- Set up Centrelink.
- Set up the load search/match parameters for CART.
- Set up the Last Cart Request ID.

Pages Used to Set up Centrelink Reporting

Page Name	Definition Name	Navigation	Usage
Centrelink Setup	SSR_CART_SETUP	Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, CART Setup, Centrelink Setup	Set up the academic institution(s) for the response file data to be reported to Centrelink. Additionally, set up the fixed attributes for the response header record.
Search/Match Rule	HCR_SM_RULE	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules	For the CART Request file, define sets of fields to search for and identify how to search for them.

Page Name	Definition Name	Navigation	Usage
Search Parameters	HCR_SM_PARM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	For the CART Request file, combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	If required, reset the last CART request ID.

Setting up Centrelink

Access the Centrelink Setup page (Set Up SACR, Product Related, Student Records, Enrollment Reporting Codes, AUS Regulatory Report Setup, CART Setup, Centrelink Setup).

Centrelink Setup

Academic Institution: PSAUS PeopleSoft Australia Uni

***System Code:**

***ABN:**

***Centrelink User ID:**

Centrelink Setup page

System Code

Enter the value CART. The system includes this value in the CART Response File Header for the field name System Code.

ABN (Australian Business Number)

Enter the ABN for your academic institution. The system includes this value in the CART Response File Header for the field name Institution ABN.

Centrelink User ID

Enter the User ID that Centrelink allocates for file exchange. The system reports this value in the CART Response File Header for field name User ID.

Setting up the Load Search/Match Parameters for CART

Define search/match rules to verify whether the data in the CART Request file contains a student ID or has an invalid student ID. Define search/match rules to verify whether the student's personal data in the request file is valid.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Search/Match."

Setting up the Last Cart Request ID

The Last CART Request ID field on the SA Features page displays the last CART Request ID that the system assigned to a CART request file. Each request file has a unique request ID. The system automatically increments the Last CART Request ID each time the CART Request File process loads a request file.

If required, reset the Last CART Request ID number. Set a number so that automatic numbering does not create numbers that already exist in the data.

This field appears only if you select the DEST, HECS, Centrelink, TAC check box on the SA Features page.

Chapter 17

(CAN) Setting Up Government Reporting

This chapter provides an overview of the PeopleSoft Canadian Government Reporting process and discusses how to:

- Define Canadian reporting business units.
- Review delivered report types and element numbers.
- Define element classifications.
- Define report periods.
- Review delivered government element codes.
- Review delivered county and country codes.
- Review delivered language, school, and common information system (CIS) language codes.
- Define provincial codes.
- Define general mapping tables.
- Define school reporting classifications.
- Define address and phone usage values for Canadian government reporting.
- Map program values for postsecondary student information system (PSIS), USISE, MET, and OUAC.
- Map plan values for PSIS, USISE, MET, and OUAC.
- Define CIS program, plan, and subplan tables.
- Define PSIS course data.
- Map Canadian school codes to external organizations.
- Define PSIS student data.
- Load the Student ID table.

See Also

[Chapter 51, "\(CAN\) Generating Canadian Government Reports," page 1267](#)

Understanding the Canadian Government Reporting Process

All postsecondary schools in Canada are required to report specific information to the federal and provincial governments. The PeopleSoft Canadian Government Reporting feature enables users to generate files in formats specified by the government. Using the PeopleSoft Canadian Government Reporting feature, you can extract reports in the following file formats:

- PSIS - Postsecondary Student Information System.
- USISE - University Student Information System Enrollment Reporting.
- CIS - Common Information System.
- MET - Ministry of Education and Training Financial Reporting.
- OUAC - Ontario Universities' Application Center Reporting.

You must complete a series of setup steps for each of the reports. Some of the steps include setting up very basic data (for example, country codes), and the system provides the data for you. Other steps are user defined, and you must closely follow the setup steps to ensure that your system is ready for reporting.

After you complete the setup steps, you can populate a table with students who are eligible for reporting.

The flat file generation process is a separate step that you can initiate after you run the extract program. You are then responsible for running the flat file through the government edits. If you find any errors and would like to make edits, you can do so without overwriting source data.

In addition, you can freeze a reporting period so that the system does not add students or modify them as of a specified date. The reporting extract process can be rerun as often as you require. When the data in the flat file is correct, you can archive the report extract tables.

Finally, all government elements are defined by element class and mapping classes. The element class determines what type of calculation or conversion needs to take place in order for the system to report the information in a code the government specifies. The five element classifications are listed in the following table:

<i>Element Classification Type</i>	<i>Description</i>
Classification Mapping (CM)	Use when there is a direct mapping of the data, but you would only report this element in certain circumstances. For example, you may have to report the student's maiden name. You would specify the mapping field of Maiden_Name on the Names table where the Name_type is equal to a particular value (in this case it would be 'MDN' for maiden). Note that the selection criteria field must be on the same record as the mapped field.

<i>Element Classification Type</i>	<i>Description</i>
Direct Mapping (DM)	Use when there is a direct mapping of the data. Conversion from application values to government code is not required. The application record and field names are entered in the Direct Mapping table for these elements.
Master Mapping (MM)	Use when there is a direct mapping of the data, but you must convert the application value to the Government Reporting Value. You must enter conversion codes in the Master Mapping Table in order for the system to report the government values.
Separate Mapping (SM)	Similar to Master Mapping, except the number of values to be mapped is greater than 15. The application provides a separate conversion table that holds the converted values.
Rules Based Mapping (RB)	This classification applies to elements that: • Cannot be derived directly from the database. • Require a separate mapping for each government code value. • Require complex institution-specific calculations. All rules based elements are identified by report type with a unique procedure number. The reports extract program uses this number to execute the associated logic. Each report type procedure number starts at 1, except MET reporting, which starts at 201. You cannot duplicate procedure numbers within a report type. Any changes to the rule based mapping procedure values require a modification of the reports.

Note. If you decide that a mapping change is required, you must ensure that the key structure of the new table allows the retrieval of a unique record. If a key field is required, then you must provide the field name and value for every student on the Student List page.

See Also

Chapter 17, "(CAN) Setting Up Government Reporting," Loading the Student ID Table, page 450

Defining Canadian Reporting Business Units

To set up Canadian reporting business units, use the Business Unit Table component (BUS_UNIT_TBL_RP).

This section discusses how to:

- Define Canadian reporting business unit descriptions.
- Define Canadian reporting business unit defaults.
- Define Canadian reporting business unit career usage values.

Pages Used to Define Canadian Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General	BUS_UNIT_TBL_RP	Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, General	PSIS: Define business unit descriptions.
Unit Defaults	BUS_UNIT_TBL_RP2	Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, Unit Defaults	PSIS: Define business unit defaults.
Career Usage	CAREER_USAGE_TBL	Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, Career Usage	PSIS: Define career usage values.

Defining Canadian Reporting Business Unit Descriptions

Access the General page (Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, General).

Institution	Enter the institution for which you want to define the reporting business unit.
Institution Cd (institution code)	Enter the institution's reporting code.
Province	Enter the province in which the reporting institution is located. This entry controls the view of the provincial codes on all of the pages (for this business unit) that are keyed by province.
Type of Student ID	Enter the type of ID that the reporting institution uses to identify students.
Sending Inst Type of Code (sending institution type of code)	Enter the sending institution's type of program or course code that it uses to identify transfer credits.

Receiving Inst Type of Code (receiving institution type of code)	Enter the receiving institution's type of program or course code that it uses to identify transfer credits.
Institution has Honour Roll	Select to indicate that the institution tracks academic excellence. You must select this check box in order for the extract program to generate a value other than the default value for Element 5140.

Defining Canadian Reporting Business Unit Defaults

Access the Unit Defaults page (Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, Unit Defaults).

General

Unit Defaults

Career Usage

Business Unit:

PSUNV

PeopleSoft University

Program Duration Units:

Weeks

Program Credit Units:

Credits

Man. Paid OJT Duration Units:

Weeks

Opt. Paid OJT Duration Units:

Weeks

Man. Unpaid OJT Duration Units:

Weeks

Optional Unpaid OJT Dur Units:

Weeks

Course Duration Units:

Hours

Course Credit Units:

Contct Hrs

Lab Duration Units:

Hours

Course OJT Duration Units:

Hours

Unit Defaults page

Program Duration Units	Enter the unit of measure that defines the normal time that a full-time student requires to complete the program.
Program Credit Units	Enter the unit of measure that defines the number of credits or units of academic achievement that a full-time student requires to graduate from or complete the program.
Man. Paid OJT Duration Units (mandatory paid on the job training duration units)	Enter the unit of measure that defines the duration of mandatory paid on-the-job training.

Opt. Paid OJT Duration Units (optional paid on the job training duration units)	Enter the unit of measure that defines the duration of optional paid on-the-job training.
Man. Unpaid OJT Duration Units (mandatory unpaid on the job training duration units)	Enter the unit of measure that defines the duration of mandatory unpaid on-the-job training.
Optional Unpaid OJT Duration Units (optional unpaid on the job training duration units)	Enter the unit of measure that defines the duration of optional unpaid on-the-job training.
Course Duration Units	Enter the unit of measure that defines the normal time a full-time student requires to complete the course by way of traditional course delivery.
Course Credit Units	Enter the unit of measure that defines the number of credits or units typically awarded for successful completion of the course.
Lab Duration Units	Enter the unit of measure that defines the number of credits or units a full-time student requires to complete the laboratory or shop training included in the course.
Course OJT Duration Units (course on the job training duration units)	Enter the unit of measure that defines the duration of on the job training activities that are a regular part of the course.

Defining Canadian Reporting Business Unit Career Usage Values

Access the Career Usage page (Records and Enrollment, Government Reporting Canada, Definitions, Business Unit Table, Career Usage).

Career Order No (career order number)	Enter a career order number for the corresponding academic career. This number determines the order in which the system processes careers when it looks to report start and end dates on the Institution Description file. The Institution Description file is an PSIS report.
Academic Career	Enter rows for all careers that you want to report.

Reviewing Delivered Report Types and Element Numbers

To set up report types, use the Define Report Type component (CAN_RPT_TYPE) and the Define Govt Element component (CAN_GOV_ELEM).

This section discusses how to:

- Review delivered government report types.
- Review delivered government elements.

Pages Used to Review Delivered Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Report Type	CAN_RPT_TYPE	Records and Enrollment, Government Reporting Canada, Definitions, Define Report Type, Report Type	All (Delivered by PeopleSoft): Review report type values.
Government Element	CAN_GOV_ELEMENT	Records and Enrollment, Government Reporting Canada, Definitions, Define Govt Element, Government Element	All (Delivered by PeopleSoft): Review government element values.

Reviewing Delivered Government Report Types

Access the Report Type page (Records and Enrollment, Government Reporting Canada, Definitions, Define Report Type, Report Type).

Description The report type description.

Short Description The report type short description.

Reviewing Delivered Government Elements

Access the Government Element page (Records and Enrollment, Government Reporting Canada, Definitions, Define Govt Element, Government Element).

Element Number The element number specified in the government documentation.

Element Default The element default value specified in the government documentation.

Defining Element Classifications

To set up element classifications, use the Define Element Class component (CAN_RPT_ELEM_CL).

This section discusses how to define element classification types.

Page Used to Define Element Classification Types

Page Name	Definition Name	Navigation	Usage
Element Class	CAN_RPT_ELEM_CLASS	Records and Enrollment, Government Reporting Canada, Definitions, Define Element Class, Element Class	All (Delivered by PeopleSoft for PSUNV): Define element classification types for your institution. Copy the values delivered with the PeopleSoft system.

Defining Element Classification Types

Access the Element Class page (Records and Enrollment, Government Reporting Canada, Definitions, Define Element Class, Element Class).

Element Class

Institution: PSUNV PeopleSoft University
Report Type: PSIS Postsecondary Student Info Sys
Government Element: CITIZ Country of Citizenship

[Find](#) | [View All](#)
First 1 of 1 Last

Element Number: 4280

Effective Date: 01/01/1900

Status: Active

***Element Classification:** RB Rule Based

RB Procedure Nbr: 57

Description:

Element Class page

Element Classification

Copying the values delivered for *PSUNV*, enter the reporting classification for the element. Values are CM (classification mapping), DM (direct mapping), MM (master mapping), RB (rules based), and SM (separate mapping).

RB Procedure Nbr (rules based procedure number)

Copying the values delivered for *PSUNV*, for rules based elements only, enter a procedure number. This number defines the procedure number that the extract program executes. You cannot create duplicate procedure numbers within a report type. MET procedure numbers *must* be numbered in the 200 series. Changes and additions to the values delivered for *PSUNV* require modification.

Panel Navigation

Enter the panel navigation to define the location where users enter the data. This field is informational only and has no programming tied to it.

Defining Report Periods

To set up report periods, use the Define Report Period component (CAN_RPT_PERIOD).

This section discusses how to define report periods.

Page Used to Define Report Periods

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Report Period	CAN_RPT_PERIOD	Records and Enrollment, Government Reporting Canada, Definitions, Define Report Period, Report Period	All: Define reporting periods.

Defining Report Periods

Access the Report Period page (Records and Enrollment, Government Reporting Canada, Definitions, Define Report Period, Report Period).

Report Period		
Institution:	PSUNV	PeopleSoft University
Report Type:	PSIS	Postsecondary Student Info Sys
Report Period:	200910	Student ID Freeze Date:
*Description:	PSIS Test Report	
Short Description:	PSIS Test	
Report Due Date:	12/31/2009	
PSIS Report Type:	Prelim Rpt 	
PSIS Start Year:	2009	
PSIS Period Start:	01/01/2009	
PSIS Period End:	12/31/2009	

Report Period page

Institution	Enter the institution for which you will run the report.
Report Type	Enter the report type to which the reporting period pertains.
Report Period	Enter a unique reporting submission period for your report type.
Report Due Date	Enter the date upon which you must report data. The system uses this date to perform effective date checking. This enables you to process data after the report date, and as long as the changes have an effective date, the system does not pick them up for reporting. If you need to make corrections to reporting data, you must ensure that the data has an effective date that is less than or equal to this report due date.
Student ID Freeze Date	The date that the student list, for the selected reporting period, is frozen.

The following fields are available for entry if you specify a report type of *PSIS*.

PSIS Report Type	Enter the type of report to be run.
PSIS Start Year	Enter the year in which the current reporting period begins.
PSIS Period Start	Enter the start date of the reporting period.
PSIS Period End	Enter the end date of the report period.

The following fields are available for entry if you specify a report type of *USISE*.

REPDAY (report day) Enter a value for the report date.

The following fields are available for entry if you specify a report type of *CIS*.

Submission Type Enter the reporting submission type.

Academic Year Enter the academic year for the reporting type.

The following fields are available for entry if you specify a report type of *MET*.

REPDAY (report day) Enter a value for the report date.

Term Enroll Prd (term enrollment period) Select *Fall* to report the QUALIF value mapped from the plan mapping table or the program mapping table. If you select *Winter*, *Spring*, or *Summer*, the system reports the FIN_QUALIF value.

Note. For Ontario schools that report OUAC elements in the Fall, ensure that the Fall reporting period that you set up for MET reporting is *identical* to the reporting period for OUAC. If the reporting period for MET and OUAC differ, the flat file process cannot combine the reporting files.

Reviewing Delivered Government Element Codes

To set up government element codes, use the Define Forpos Code component (CAN_RPT_FORPOS), Define Quacod Code component (CAN_RPT_QUACOD), Define Qualif Code component (CAN_RPT_QUALIF), Define Seshun Code component (CAN_RPT_SESHUN), and the Define Spemaj Code component (CAN_RPT_SPEMAJ).

This section lists the pages used to review delivered government element codes.

Pages Used to Review Delivered Government Element Codes

Page Name	Definition Name	Navigation	Usage
Forpos Code (formula program of study code)	CAN_RPT_FORPOS	Records and Enrollment, Government Reporting Canada, Definitions, Define Forpos Code, Forpos code	USISE, MET: Review delivered FORPOS codes.
Quacod Code (coded title of qualification code)	CAN_RPT_QUACOD	Records and Enrollment, Government Reporting Canada, Definitions, Define Quacod Code, Quacod Code	USISE, MET: Review delivered QUACOD codes.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Qualif Code (qualification code)	CAN_RPT_QUALIF	Records and Enrollment, Government Reporting Canada, Definitions, Define Qualif Code, Qualif Code	USISE, MET: Review delivered QUALIF codes.
Seshun Code (session code)	CAN_RPT_SESHUN	Records and Enrollment, Government Reporting Canada, Definitions, Define Seshun Code, Seshun Code	USISE, MET: Review delivered SESHUN codes.
Spemaj Code (specialization of major field of study code)	CAN_RPT_SPEMAJ	Records and Enrollment, Government Reporting Canada, Definitions, Define Spemaj Code, Spemaj Code	USISE, MET: Review delivered SPEMAJ codes.

Reviewing Delivered County and Country Codes

To set up county and country codes, use the Define Country Codes component (CAN_GOV_COUNTY).

This section lists the pages used to review delivered county and country codes.

Pages Used to Review Delivered County and Country Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
County Code	CAN_GOV_COUNTY	Records and Enrollment, Government Reporting Canada, Definitions, Define County Codes, Country Code	PSIS, USISE, MET: Review delivered county codes.
Country Code	CAN_GOV_COUNTRY	Records and Enrollment, Government Reporting Canada, Definitions, Define Country Codes, Country Code	PSIS, USISE, MET: Review delivered country codes.

Reviewing Delivered Language, School, and CIS Language Codes

To set up language, school, and CIS language codes, use the Define Language Codes component (CAN_GOV_LANG), Define School Codes component (CAN_GOV_SCHOOL), and the Define CIS Language Code component (CAN_CIS_LANGUAGE).

This section lists the pages used to review delivered language, school, and CIS language codes.

Pages Used to Review Delivered Language, School, and CIS Language Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Language Code	CAN_GOV_LANG	Records and Enrollment, Government Reporting Canada, Definitions, Define Language Codes, Language Code	PSIS, USISE, MET: Review delivered language codes.
School Code	CAN_GOV_SCHOOL	Records and Enrollment, Government Reporting Canada, Definitions, Define School Codes, School Code	PSIS, CIS: Review delivered school codes.
CIS Language Code	CAN_CIS_LANGUAGE	Records and Enrollment, Government Reporting Canada, Definitions, Define CIS Language Code, CIS Language code	CIS: Review delivered CIS language codes.

Defining Provincial Codes

To set up provincial codes, use the Prov Approval Codes component (CAN_PROV_APPR_TBL), Prov Course Funding Codes component (CAN_PROV_FNDCRS), Prov Funding by Citizen component (CAN_PROV_CITZ), Prov Major Field of Study component (CAN_PROV_MAJOR), Prov Program Codes component (CAN_PROV_PROG), and the Prov Prog Funding Codes component (CAN_PROV_FUND).

This section discusses how to:

- Define program funding approval codes.
- Define provincial course funding codes.
- Define provincial citizen funding codes.
- Define provincial major field of study codes.
- Define provincial program codes.
- Define provincial program funding codes.
- Define provincial special initiative codes.

Pages Used to Define Provincial Codes

Page Name	Definition Name	Navigation	Usage
Prov Approval Codes (provincial approval codes)	CAN_PROV_APPR_TBL	Records and Enrollment, Government Reporting Canada, Definitions, Prov Approval Codes, Prov Approval Codes	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The Program and Plan Mapping tables prompt against the approval codes you define.
Prov Course Fund Code (provincial course funding code)	CAN_PROV_FNDCRS	Records and Enrollment, Government Reporting Canada, Definitions, Prov Course Funding Codes, Prov Course Fund Code	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The Cdn PSIS Course Data table prompts against the course funding codes you define.
Prov Citizenship Fund Class (provincial citizenship funding classification)	CAN_PROV_CITZ	Records and Enrollment, Government Reporting Canada, Definitions, Prov Funding by Citizen, Prov Citizenship Fund Class	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The PSIS Student Data table prompts against the classification funding codes you define.
Prov Major Code (provincial major code)	CAN_PROV_MAJOR	Records and Enrollment, Government Reporting Canada, Definitions, Prov Major Field of Study, Prov Major Code	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the major codes you define.
Prov Program Code (provincial program code)	CAN_PROV_PROG	Records and Enrollment, Government Reporting Canada, Definitions, Prov Program Codes, Prov Program Code	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the program codes you define.
Prov Prog Funding Code (provincial program funding code)	CAN_PROV_FUND	Records and Enrollment, Government Reporting Canada, Definitions, Prov Prog Funding Codes, Prov Prog Funding code	PSIS: Populate this page if your institution reports this information to the Provincial Ministry. The program and plan mapping tables prompt against the province program funding code.

Defining Program Funding Approval Codes

Access the Prov Approval Codes page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Approval Codes, Prov Approval Codes).

Province	The system populates the province field to the value defined for your business unit.
Approval Code	Enter the provincial code that defines whether the student is approved for funding in the program.
Description and Short Description	Enter the descriptions for the code.

Defining Provincial Course Funding Codes

Access the Prov Course Fund Code page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Course Funding Codes, Prov Course Fund Code).

Province	The system populates the province field by default to the value defined for your business unit.
Crse Fund Cd (course funding code)	Enter the provincial code that defines the course funding code.

Defining Provincial Citizen Funding Codes

Access the Prov Citizenship Fund Class page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Funding by Citizen, Prov Citizenship Fund Class).

Province	The system populates the province field by default to the value defined for your business unit.
Funding Class by Citz (funding classification by citizen)	Enter the provincial code that classifies the student for grant purposes.

Defining Provincial Major Field of Study Codes

Access the Prov Major Code page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Major Field of Study, Prov Major Code).

Province	The system populates the province field by default to the value defined for your business unit.

Prov Major (province major) Enter the provincial code that classifies students' major field of study.

Defining Provincial Program Codes

Access the Prov Program Code page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Program Codes, Prov Program Code).

Province The system populates the province field by default to the value defined for your business unit.

Prog Category (program category) Enter the provincial code that defines the program category.

Defining Provincial Program Funding Codes

Access the Prov Prog Funding Code page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Prog Funding Codes, Prov Prog Funding code).

Province The system populates the province field by default to the value defined for your business unit.

Prov Fund Cd(province funding code) Enter the provincial code that classifies whether the student has been approved for funding in the program.

Defining Provincial Special Initiative Codes

Access the Prov Special Initiative Code page (Records and Enrollment, Government Reporting Canada, Definitions, Prov Special Initiative Code).

Province The system populates the province field by default to the value defined for your business unit.

Special Init Cd (special initiative code page) Enter the provincial special initiative code that associates with students in the program.

Defining General Mapping Tables

To set up general mapping tables, use the Language Mapping component (CAN_RPT_TONGUE), Province Mapping component (CAN_RPT_PROV), Reporting Sequence Mapping component (CAN_RPT_SEQ), Term Group Mapping component (CAN_RPT_TERM_GRP), OUAC Applno Mapping component (CAN_RPT_APPLNO), Classification Mapping component (CAN_RPT_CM), Direct Mapping component (CAN_RPT_DM), Master Mapping component (CAN_RPT_MM), and the Separate Mapping component (CAN_RPT_SM).

This section discusses how to:

- Define mapping language codes.
- Review delivered province codes.
- Map Canadian reporting sequence.
- Map terms and sessions to reporting periods.
- Review delivered OUAC application numbers.
- Define the classification mapping tables.
- Define the direct mapping table.
- Define the master mapping table.
- Define the separate mapping table.

Pages Used to Define General Mapping Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Language Mapping	CAN_RPT_TONGUE	Records and Enrollment, Government Reporting Canada, Mapping, Language Mapping, Language Mapping	CIS, PSIS, MET, USISE: Map language codes.
Province Mapping	CAN_RPT_PROV	Records and Enrollment, Government Reporting Canada, Mapping, Province Mapping, Province Mapping	CIS, MET, USISE: Review PeopleSoft delivered province codes.
Reporting Sequence Mapping	CAN_RPT_SEQ	Records and Enrollment, Government Reporting Canada, Mapping, Reporting Sequence Mapping, Reporting Sequence Mapping	USISE (Optional): Define a record and reporting sequence for the USISE report type. Populate this page to limit your USIS Enrollment file to only one record per student from the CAN_STDNT_LST table.
Term Group Mapping	CAN_RPT_TERM_GRP	Records and Enrollment, Government Reporting Canada, Mapping, Term Group Mapping, Term Group Mapping	ALL: For each report type, report period, and career, map the applicable terms and sessions that you want to report.

Page Name	Definition Name	Navigation	Usage
OUAC Applno Mapping (OUAC application number mapping)	CAN_RPT_APPLNO	Records and Enrollment, Government Reporting Canada, Mapping, OUAC Applno Mapping, OUAC Applno Mapping	OUAC: Review delivered OUAC application numbers.
Classification Mapping	CAN_RPT_CM	Records and Enrollment, Government Reporting Canada, Mapping, Classification Mapping Table, Classification Mapping	PSIS: Define classification mapping values.
Direct Mapping	CAN_RPT_DM	Records and Enrollment, Government Reporting Canada, Mapping, Direct Mapping Table, Direct Mapping	CIS, PSIS, USISE: Define direct mapping values.
Master Mapping	CAN_RPT_MM	Records and Enrollment, Government Reporting Canada, Mapping, Master Mapping Table, Master Mapping	CIS, PSIS, USISE, OUAC: Define master mapping values.
Separate Mapping	CAN_RPT_SM	Records and Enrollment, Government Reporting Canada, Mapping, Separate Mapping Table, Separate Mapping	CIS, PSIS, OUAC, USISE: Define separate mapping values.

Defining Mapping Language Codes

Access the Language Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Language Mapping, Language Mapping).

Language Code	Enter the PeopleSoft language code that you want to map.
CIS Tongue	Enter the corresponding CIS value for the language code. Map this field if your institution performs CIS reporting. This field prompts against the CAN_CIS_LANG record.
Tongue	Enter the corresponding USISE value for the language code. Map this field if your institution performs USISE or MET reporting.
PSIS Language	Enter the corresponding PSIS value for the language code. Map this field if your institution performs PSIS reporting. This field prompts against the CAN_GOV_LANG record.

Reviewing Delivered Province Codes

Access the Province Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Province Mapping, Province Mapping).

- Province**
- The PeopleSoft province value that you want to map.
- Province Number**
- The province code as defined by Statistics Canada.

Mapping Canadian Reporting Sequence

Access the Reporting Sequence Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Reporting Sequence Mapping, Reporting Sequence Mapping).

- Record**
- Enter the PeopleSoft record name that determines reporting sequence for this report type. For example, *STDNT_CAR_TERM*.
- Field Name**
- Enter the PeopleSoft field name that determines reporting sequence for this report type. For example, *ACAD_CAREER*.
- Reporting Sequence**
- Enter the sequence or priority number that relates to the PeopleSoft value for the field you specify. At runtime, you specify which value that you want the system to select for processing in the event that the selection process finds multiple records for a student. For example, *05*.
- PeopleSoft Value**
- Enter the codes for the field name you specify. For example, *GRAD*.

Mapping Terms and Sessions to Reporting Periods

Access the Term Group Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Term Group Mapping, Term Group Mapping).

Term Group Mapping

Institution:

PSUNV

PeopleSoft University

Report Type:

PSIS

Postsecondary Student Info Sys

Report Period:

200910

PSIS Test Report

Academic Career:

UGRD

Undergraduate

*Term

0630

2009 Fall

*Session

Regular Academic Session

Report Type

Prelim Rpt

Withdrawal Date

12/31/2009

Customize

Find

First

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Last

Term Group Mapping page

Institution	Enter the reporting institution.
Report Type	Enter the report type.
Report Period	Enter a reporting period for the report type.
Academic Career	Enter the academic career that you want to include for the reporting period.
Term	Enter the term for the career and report period.
Session	Enter the institution session for the term and report period.

The following fields are available for entry if you specify a report type of *CIS*.

CIS Session	Enter the appropriate CIS session value for the term and session you specify.

The following fields are available for entry if you specify a report type of *PSIS*.

Report Type	Select the report in which you want to include the term and session data. Values are: <i>Prelim Report (preliminary report)</i>: Select to include the term and session data in the Preliminary Report and the Final Report. <i>Final Report</i>: Select to include the term and session data in the Final Report only.
Withdrawal Date	Enter the last date in the term and session that a student can withdraw from a course without academic penalty.

The following fields are available for entry if you specify a report type of *USISE* or *MET*.

Seshun Value (session value)	Enter the appropriate USIS Enrolment Seshun value for the term and session specified.

Reviewing Delivered OUAC Application Numbers

Access the OUAC Applno page (Records and Enrollment, Government Reporting Canada, Mapping, OUAC Applno Mapping, OUAC Applno Mapping).

OUAC Appl Nbr (OUAC application number)	Enter the two-digit OUAC application number (APPLNO).
OUAC APPLN (OUAC application number)	Enter the converted one digit application number (CNVAPL).

Defining the Classification Mapping Table

Access the Classification Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Classification Mapping Table, Classification Mapping).

Classification Mapping

Institution:

PSUNV

PeopleSoft University

Report Type:

PSIS

Postsecondary Student Info Sys

Can Govt Elem:

CLASSROOM

Classroom Instruction Course

Find | View All

First1 of 1Last

Element Number:

6110

*Effective Date:

01/01/1900

*Status:

Active

*Record:

CRSE_ATTENDANCE

*Field Name:

INSTRUCTION_MODE

*Selection Field:

INSTRUCTION_MODE

Selection Field Value

Find

First1 of 1Last

Classification Mapping page

Values for the Record, Field Name, and Selection Field fields are delivered and defined for all applicable elements for PSUNV. Set up the same values for your institution if you perform PSIS reporting.

- Record

Enter the PeopleSoft record name that the system uses to report the specified element.
- Field Name

Enter the PeopleSoft field name that the system uses to report the specified element. The system prompt table displays all valid fields for the record, but does not edit your input against the list. This enables you to enter a field name that is in a subrecord.
- Selection Field

Enter the PeopleSoft selection field that applies to the element. This field must be on the record you specify. This field may be the same as or different from the Field Name value.
- Selection Field Value

Enter the PeopleSoft selection field values that relate to the selection field that you want to report. You can enter more than one value.

Defining the Direct Mapping Table

Access the Direct Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Direct Mapping Table, Direct Mapping).

Values for the Record, Field Name, and Selection Field fields are delivered and defined for all applicable elements for PSUNV. Set up the same values for your institution if you perform PSIS reporting.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.
Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a subrecord.

Defining the Master Mapping Table

Access the Master Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Master Mapping Table, Master Mapping).

Values for the Record, Field Name, and Selection Field fields are delivered and defined for all applicable elements for PSUNV. Set up the same values for the report types that are applicable to your institution.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.
Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a subrecord.
PeopleSoft Value	Enter the delivered or user-defined values for the field name.
Government Value	Enter the government code that corresponds to the PeopleSoft value.

Defining the Separate Mapping Table

Access the Separate Mapping page (Records and Enrollment, Government Reporting Canada, Mapping, Separate Mapping Table, Separate Mapping).

Values for the Record, Field Name, and Selection Field fields are delivered and defined for all applicable elements for PSUNV. Set up the same values for the report types that are applicable to your institution.

Record	Enter the PeopleSoft record name that the system uses to report the specified element.

Field Name	Enter the PeopleSoft field name that the system uses to report the specified element. The prompt table displays all valid fields for the record, but will not edit your input against the list. This enables you to enter a field name that is in a subrecord.
Gov't Record (government record)	Enter the PeopleSoft record that houses the translate codes.
Gov't Field Name (government field name)	Enter the PeopleSoft field that contains the government codes that correspond to the values in the field name.

Defining School Reporting Classifications

To set up school reporting classifications, use the School Type Table component (LS_SCHL_TYPE_TABLE).

This section discusses how to define school reporting classifications.

Prerequisites

To see the Canadian field on the School Type table you must select the Government Reporting check box on the SA Features page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Reviewing Installation Setup and System Defaults," Selecting Country-Specific Features and Enabling CRM for Higher Education Feature

Page Used to Define School Reporting Classifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
School Type Table	SCHOOL_TYPE_TABLE	Set Up SACR, Common Definitions, External Education, School Type Table, School Type Table	CIS, PSIS, MET, USISE: Define school reporting classifications.

Defining School Reporting Classifications

Access the School Type Table page (Set Up SACR, Common Definitions, External Education, School Type Table, School Type Table).

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Setting Up Prospects," Setting Up School Types.

Defining Address and Phone Usage Values for Canadian Government Reporting

This section discusses how to:

- Define address usage values.
- Define email address usage values.
- Define phone usage values.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Address Usages

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Phone Usages

Pages Used to Define Address and Phone Usage Table Entries for Canadian Government Reporting

Page Name	Definition Name	Navigation	Usage
Address Usage	ADDR_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table, Address Usage	PSIS: Define Canadian reporting address usage values.
Phone Usage	PHONE_USAGE_TABLE	Set Up SACR, Product Related , Campus Community , Establish People Processing , Setup, Phone Usage Table, Phone Usage	PSIS: Define Canadian reporting phone usage values.

Defining Address Usage Values

Access the Address Usage page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table, Address Usage).

To create an address usage for PSIS Current address reporting:

1. Access the Address Usage Table page.

2. Add an address usage of *RPT_ADDR*.
3. In the Description field, enter *Address Priority for Cdn Rpts*.
4. In the Short Description field, enter *Cdn Reports*.
5. Using the Usage Order, Usage Type, and Address Type fields, insert rows for all of your address types.

Defining Email Address Usage Values

Access the Address Usage page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table, Address Usage).

To create an address usage for PSIS Current email address reporting:

1. Access the Address Usage Table page.
2. Add an address usage of *RPT_EMAIL*.
3. In the Description field, enter *E-mail Priority for Cdn Rpts*.
4. In the Short Description field, enter *Cdn Reports*.
5. Using the Usage Order, Usage Type, and Email Type fields, insert rows for all of your email address types.

Defining Phone Usage Values

Access the Phone Usage page (Set Up SACR, Product Related , Campus Community , Establish People Processing , Setup, Phone Usage Table, Phone Usage).

To create a phone usage for PSIS Current phone reporting:

1. Access the Phone Usage page.
2. Add a phone usage of *RPT_PHONE*.
3. In the Description field, enter *Phone Priority for Cdn Rpts*.
4. In the Short Description field, enter *Cdn Reports*.
5. Using the Usage Order and Phone Type fields, insert rows for all of your phone usage types.

Mapping Program Values for PSIS, USISE, MET, and OUAC

To set up program values for PSIS, USISE, MET, and OUAC, use the PSIS Program Table component (CAN_ESIS_PROG), and the Academic Program Table CDN component (CAN_RPT_PROG).

This section discusses how to:

- Define PSIS program mapping values.

- Define USISE program mapping values.
- Define MET and OUAC program mapping values.

Pages Used to Define PSIS, USISE, MET, and OUAC Program Mapping Values

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PSIS Program Mapping 1	CAN_RPT_PROG3	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 1	PSIS: Define PSIS program mapping values.
PSIS Program Mapping 2	CAN_RPT_PROG4	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 2	PSIS: Define additional PSIS program mapping values.
PSIS Program Mapping 3	CAN_RPT_PROG5	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 3	PSIS: Define additional PSIS program mapping values.
PSIS Program Mapping 4	CAN_RPT_PROG6	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 4	PSIS: Define additional PSIS program mapping values.
USISE Program Mapping	CAN_RPT_PROG	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Program Table CDN, USISE Program Mapping	USISE: Define USISE program mapping values.
MET/OUAC Program Mapping	CAN_RPT_PROG2	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Program Table CDN, MET/OUAC Program Mapping	MET, OUAC: Define MET and OUAC program mapping values.

Defining PSIS Program Mapping 1 Values

Access the PSIS Program Mapping 1 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 1).

PSIS Program Mapping 1

PSIS Program Mapping 2

PSIS Program Mapping 3

PSIS Program Mapping 4

Academic Institution:

PSUNV

PeopleSoft University

Academic Program:

LAU

Liberal Arts Undergraduate

Find | View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

Credential Type:

Degree

Joint Credential Type:

N/A

Program Type:

Bach Degr

Joint Program Type:

CollegeTsf

Program Duration:

8.00

Duration Units:

Semesters

Duration in Hrs:

200

Continuing Education

No

Prov Prog Cat:

PRVCT1

Alberta Prov Prog Cat 1

Prov Fund Cd:

FNDCCD1

AB Funding Code 1

PSIS Program Mapping 1 page

Credential Type	Enter the type of credential awarded to students for successful completion of the program.
Joint Credential Type	Enter the joint or second credential for joint program in which a student typically receives two credentials.
Program Type	Enter the program type.
Joint Program Type	Enter the type of joint credential awarded to students for successful completion of the program.
Prog Duration (program duration)	Enter the normal time to complete the program for a full-time student who takes courses through traditional delivery.
Duration Units	Enter the unit of measure for the program duration. The system populates this field by default from the Business Unit Table page.
Duration in Hrs (duration in hours)	Enter the sum of the hours of instruction to complete the program for a full-time student who takes courses through traditional delivery.
Prov Prog Cat (province program category)	Enter the program category as defined by the Provincial Ministry. This field prompts against the CAN_PROV_PROG record.

Prov Fund Cd (province funding code)

Enter the provincial funding code as defined by the Provincial Ministry. This field prompts against the CAN_PROV_FUND record.

Defining PSIS Program Mapping 2 Values

Access the PSIS Program Mapping 2 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 2).

PSIS Program Mapping 1

PSIS Program Mapping 2

PSIS Program Mapping 3

PSIS Program Mapping 4

Academic Institution:PSUNVPeopleSoft University

Academic Program:LAULiberal Arts Undergraduate

Find | View All

First1 of 1Last

Effective Date:01/01/1900

Credits Needed:100.00

Full/Part Time:FT/PT

Enrollment Limit:Instit Lim

Entrance Rqmt:No Ent Req

Medical Rqmt:N/A (A)

Experience Rqmt:No (A)

Status:Active

Credit Units:Credits

Delivered Under Contract:Yes

Capacity:200

Legal Rqmt:No

Aptitude Rqmt:Yes (A)

Other Rqmt:No

PSIS Program Mapping 2 page

- Credits Needed

Enter the number of credits or units of academic achievement required to complete the program.
- Credit Units

Enter the type of units used in the Credits Needed field. The system populates this field by default from the Business Unit Table.
- Full/Part Time

Indicate the way in which the program is offered.
- Delivered Under Contract

Indicate whether the program is delivered under contract by the institution to an outside party. Values are *N/A*, *No*, *Unknown*, and *Yes*.
- Enrollment Limit

Indicate whether the program is limited, either by an internally or externally imposed quota.
- Capacity

If the program has limited enrollment, enter the maximum number of new students that can be admitted to the program during a report period.
- Entrance Rqmt (entrance requirement)

Enter the educational entrance requirements to begin the program.

Legal Reqmt (legal requirement)	Indicate whether any legal requirements exist for the program. Your choices are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Medical Reqmt (medical requirement)	Indicate whether any medical or psychological entrance requirements exist for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Aptitude Reqmt (aptitude requirement)	Indicate whether successful completion of an aptitude and proficiency test (or interview) is an entrance requirement for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Experience Reqmt (experience requirement)	Indicate whether previous related experience is an entrance requirement for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Other Reqmt (other requirement)	Indicate whether any other entrance requirements are required for entry into the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .

Defining PSIS Program Mapping 3 Values

Access the PSIS Program Mapping 3 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 3).

PSIS Program Mapping 3 page

Mandatory Paid OJT Duration (mandatory paid on the job training duration)	Enter the duration of mandatory paid on the job training (OJT) activities that are a regular part of the program.

Man Paid Units (mandatory paid units)	Enter the unit type for the Man Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of <i>N/A</i> if you do not enter a duration value.
Optional Paid OJT Duration (optional paid on the job training duration)	Enter the duration of optional paid on the job training activities that are a regular part of the program.
Opt Paid Units (optional paid units)	Enter the unit type for the Optional Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of <i>N/A</i> if you do not enter a duration value.
Mandatory Unpaid OJT Duration (mandatory unpaid on the job training duration)	Enter the duration of mandatory unpaid on the job training activities that are a regular part of the program.
Man Unpaid OJT Units (mandatory unpaid on the job training units)	Enter the unit type for the Mandatory Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of <i>N/A</i> if you do not enter a duration value.
Optional Unpaid OJT Duration (optional unpaid on the job training duration)	Enter the duration of optional unpaid on the job training activities that are a regular part of the program.
Opt Unpaid OJT Units (optional unpaid on the job training units)	Enter the unit type for the Optional Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of <i>N/A</i> if you do not enter a duration value.

Defining PSIS Program Mapping 4 Values

Access the PSIS Program Mapping 4 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Program Table, PSIS Program Mapping 4).

PSIS Program Mapping 1		PSIS Program Mapping 2		PSIS Program Mapping 3		PSIS Program Mapping 4	
Academic Institution:	PSUNV PeopleSoft University						
Academic Program:	LAU Liberal Arts Undergraduate						
Find View All First 1 of 1 Last							
Effective Date:	01/01/1900		Status:	Active			
Program Defaults							
Cost Recovery Program:	Yes		Articulated Program:	Yes			
Co-op Program:	Yes		Brokered Program:	Sponsor			
Collaborative Program:	Yes						

PSIS Program Mapping 4 page

Cost Recovery Program	Indicate whether the program is a cost recovery program.
Articulated Program	Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulation agreement.
Co-op Program	Indicate whether this is a co-op program.
Brokered Program	Indicate whether this is a brokered program.
Collaborative Program	Indicate whether the program is offered under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers part of the program.

Defining USISE Program Mapping Values

Access the USISE Program Mapping page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Program Table CDN, USISE Program Mapping).

USISE Program Mapping		MET/OUAC Program Mapping	
Academic Institution:	PSUNV PeopleSoft University		
Academic Program:	FAU Fine Arts Undergraduate		
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	*Status:	Active
*QUALIF:	13 UG-BA Degr	FIN QUALIF:	23 UG-Upgrd
AWABOD:	Degree	*HONIND:	Single Hon
*QUACOD:	081 Agricultur	SESTYP:	Semester
SPEMAJ:	50399 Othe Agric	*SESTOT:	08
*NORMCR:	0200		

USISE Program Mapping page

QUALIF	Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. The system reports this value in the Fall submission.
FIN QUALIF	Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. FIN QUALIF values are reported in all submissions excluding the one in the Fall.
AWABOD	Enter the government code that represents the body awarding the diploma or certificate.
HONIND	Enter the government code that represents the honors program indicator.
QUACOD	Enter the government code for coded title of qualification. This field prompts against the Can Report QUACOD table.
SESTYP	Enter the government code that represents the type of session.
SPEMAJ	Enter the government code for specialization or major field of study. This field prompts against the Can Report SPEMAJ table.
SESTOT	Enter the government code that represents the total number of sessions required to compete the program.
NORMCR	Enter the government code that represents the normal credit/course/unit requirements.

Defining MET and OUAC Program Mapping Values

Access the MET/OUAC Program Mapping page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Program Table CDN, MET/OUAC Program Mapping).

USISE Program Mapping

MET/OUAC Program Mapping

Academic Institution:

PSUNV

PeopleSoft University

Academic Program:

FAU

Fine Arts Undergraduate

Find | View All

First

1 of 1

Last

Effective Date:

01/01/1900

Status:

Active

MET Reporting

OUAC Reporting

FORPOS:

101

U-Agriculture

UPREG:

FAU

FT Load:

Annual Weight:

Term Weight:

MET Form Fee:

Min BIU:

Max BIU:

☐ Ineligible BIU

MET/OUAC Program Mapping page

FORPOS (formula program of study)	Enter the government code that represents the formula program of study.
UPREG (university and program registration)	Enter the government code that represent the university and program in which applicants register.
FT Load	Enter the full time load for an academic program and plan as the institution defines it.
Annual Weight	Established by MET and based on the FORPOS code. Weight varies for diploma and degree programs. Weights also differ from one institution to another for institution specific FORPOS codes.
Term Weight	Enter a value that the system uses when calculating the annual business income unit (BIU) for graduate levels.
MET Form Fee	Established by MET, based on the FORPOS code.
Min BIU (minimum business income unit)	Enter the minimum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.

Max BIU (maximum business income unit)

Enter the maximum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.

Ineligible BIU (ineligible business income unit)

Select this check box to indicate the academic program and plan is ineligible and the system should therefore not include it in the calculation of FTE (full time equivalency).

Mapping Plan Values for PSIS, USISE, MET, and OUAC

To set up plan values for PSIS, USISE, MET, and OUAC, use the PSIS Plan Table component (CAN_ESIS_PLAN) and the Academic Plan Table CDN component (CAN_RPT_PLAN).

This section discusses how to:

- Define PSIS plan mapping values.
- Define USISE plan mapping values.
- Define MET/OUAC plan mapping values.

Pages Used to Map PSIS, USISE, MET, and OUAC Plan Values

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PSIS Plan Mapping 1	CAN_RPT_PLAN3	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 1	PSIS: Define PSIS plan mapping values.
PSIS Plan Mapping 2	CAN_RPT_PLAN4	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 2	PSIS: Define additional PSIS plan mapping values.
PSIS Plan Mapping 3	CAN_RPT_PLAN5	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 3	PSIS: Define additional PSIS plan mapping values.
PSIS Plan Mapping 4	CAN_RPT_PLAN6	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 4	PSIS: Define additional PSIS plan mapping values.

Page Name	Definition Name	Navigation	Usage
USISE Plan Mapping	CAN_RPT_PLAN	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Plan Table CDN, USISE Plan Mapping	USISE: Define USISE plan mapping values.
MET/OUAC Plan Mapping	CAN_RPT_PLAN2	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Plan Table CDN, MET/OUAC Plan Mapping	MET/OUAC: Define MET and OUAC plan mapping values.

Defining PSIS Plan Mapping 1 Values

Access the PSIS Plan Mapping 1 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 1).

The screenshot displays the 'PSIS Plan Mapping 1' page. At the top, there are four tabs: 'PSIS Plan Mapping 1' (selected), 'PSIS Plan Mapping 2', 'PSIS Plan Mapping 3', and 'PSIS Plan Mapping 4'. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University) and the 'Academic Plan' is set to 'PSYCH' (Psychology). A navigation bar includes 'Find | View All' and 'First 1 of 1 Last'. The main form contains the following fields:

- *Effective Date:** 01/01/1900
- *Status:** Active
- Credential Type:** Degree
- Joint Credential Type:** N/A
- Program Type:** Bach Degr
- Joint Program Type:** (Invalid Val
- Program Duration:** 6.00
- Duration Units:** Semesters
- Duration in Hrs:** 150
- Continuing Education:** (empty)
- Prov Prog Cat:** PRVCT1 (Alberta Prov Prog Cat 1)
- Prov Fund Cd:** FND CD1 (AB Funding Code 1)

PSIS Plan Mapping 1 page

Credential Type

Enter the type of credential the institution awards for successful completion of the program.

Joint Credential Type

Enter the joint or second credential for joint programs in which a student typically receives two credentials.

Program Type	Enter the program type.
Joint Program Type	Enter the type of joint credential the institution awards for successful completion of the program.
Program Duration	Enter the normal time to complete the entire program for a full-time student through traditional program delivery.
Duration Units	Enter the type of time unit you used to calculate program duration. Values are <i>Acad Years</i> , <i>Half - Semes</i> , <i>Months</i> , <i>NA</i> , <i>Semesters</i> , <i>Weeks</i> , and <i>Years</i> .
Duration in Hrs (duration in hours)	Enter the sum of the hours of instruction of courses normally required to complete the entire program through traditional delivery.

Defining PSIS Plan Mapping 2 Values

Access the PSIS Plan Mapping 2 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 2).

PSIS Plan Mapping 1 | **PSIS Plan Mapping 2** | PSIS Plan Mapping 3 | PSIS Plan Mapping 4

Academic Institution: PSUNV PeopleSoft University
 Academic Plan: PSYCH Psychology

Find | View All First 1 of 1 Last

Effective Date:	01/01/1900	Status:	Active
Credits Needed:	75.00	Credit Units:	Credits
Full/Part Time:	Full Time	Delivered Under Contract:	Yes
Enrollment Limit:	Instit Lim	Capacity:	150
Entrance Rqmt:	No Ent Req	Legal Rqmt:	Yes
Medical Rqmt:	No	Aptitude Rqmt:	Yes
Experience Rqmt:	No	Other Rqmt:	No

PSIS Plan Mapping 2 page

Credits Needed	Enter the number of credits or units of academic achievement required to complete the program.
Credit Units	Enter the type of units used in the Credits Needed field. The system populates this field by default from the Business Unit table.

Full/Part Time	Indicate whether the program is offered on a full-time basis (<i>FT</i>), part-time basis (<i>PT</i>), or at the student's option (<i>FT/PT</i>).
Delivered Under Contract	Indicate whether the program is delivered under contract by the institution to an outside party. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Enrollment Limit	Indicate whether the program is limited, either by an internally or externally imposed quota. Values are <i>Govt Limit</i> , <i>Instit Lim</i> , <i>N/A</i> , <i>No</i> , <i>Prof Org</i> , and <i>Unknown</i> .
Capacity	If the program has limited enrollment, enter the maximum number of new students that can be admitted to the program during a report period.
Entrance Rqmt (entrance requirement)	Enter the educational entrance requirements to begin the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Legal Rqmt (legal requirement)	Indicate whether any legal requirements exist for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Medical Rqmt (medical requirement)	Indicate whether any medical or psychological entrance requirements exist for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Aptitude Rqmt (aptitude requirement)	Indicate whether successful completion of an aptitude and proficiency test (or interview) is an entrance requirement for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Experience Rqmt (experience requirement)	Indicate whether previous related experience is an entrance requirement for the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Other Rqmt (other requirement)	Indicate whether any other entrance requirements are required for entry into the program. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .

Defining PSIS Plan Mapping 3 Values

Access the PSIS Plan Mapping 3 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 3).

PSIS Plan Mapping 1		PSIS Plan Mapping 2		PSIS Plan Mapping 3		PSIS Plan Mapping 4	
Academic Institution:	PSUNV	PeopleSoft University					
Academic Plan:	PSYCH	Psychology					
Find View All First 1 of 1 Last							
Effective Date:	01/01/1900	Status:	Active				
Mandatory Paid OJT Duration:	100.00	Man Paid Units:	Hours				
Optional Paid OJT Duration:	110.00	Opt Paid Units:	Hours				
Mandatory Unpaid OJT Duration:	120.00	Man Unpaid OJT Units:	Hours				
Optional Unpaid OJT Duration:	130.00	Opt Unpaid OJT Units:	Hours				
Prov Major Field of Study:	MAJOR1	AB Major Field of Study 1					
Prov Approval Code:	ABAPR1	AB Prov Approval Code					

PSIS Plan Mapping 3 page

Mandatory Paid OJT Duration (mandatory paid on the job training duration)

Enter the duration of mandatory paid on the job training (OJT) activities that are a regular part of the program.

Man Paid Units (mandatory paid units)

Enter the unit type for the Man Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of *N/A* if you do not enter a duration value.

Optional Paid OJT Duration (optional paid on the job training duration)

Enter the duration of optional paid on the job training (OJT) activities that are a regular part of the program.

Opt Paid Units (optional paid units)

Enter the unit type for the Optional Paid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of *N/A* if you do not enter a duration value.

Mandatory Unpaid OJT Duration (mandatory unpaid on the job training duration)

Enter the duration of mandatory unpaid on the job training (OJT) activities that are a regular part of the program.

Man Unpaid OJT Units (mandatory unpaid on the job training units)

Enter the unit type for the Mandatory Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of *N/A* if you do not enter a duration value.

Optional Unpaid OJT Duration (optional unpaid on the job training duration)

Enter the duration of optional unpaid on the job training (OJT) activities that are a regular part of the program.

Opt Unpaid OJT Units
(optional unpaid on the job training units)

Enter the unit type for the Optional Unpaid OJT Duration field. The system populates this field by default from the Business Unit table. The system populates a value of *N/A* if you do not enter a duration value.

Defining PSIS Plan Mapping 4 Values

Access the PSIS Plan Mapping 4 page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Plan Table, PSIS Plan Mapping 4).

PSIS Plan Mapping 1PSIS Plan Mapping 2PSIS Plan Mapping 3PSIS Plan Mapping 4

Academic Institution:PSUNVPeopleSoft University

Academic Plan:PSYCHPsychology

Find | View All

First1 of 1Last

Effective Date:01/01/1900

Status:Active

Program Defaults

Cost Recovery Program:Yes

Articulated Program:Yes

Co-op Program:Yes

Brokered Program:Sponsor

Collaborative Program:Yes

PSIS Plan Mapping 4 page

- Cost Recovery Program**

Indicate whether the program is a cost recovery program.
- Articulated Program**

Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulation agreement.
- Co-op Program**

Indicate whether this is a co-op program.
- Brokered Program**

Indicate whether the program is a brokered program.
- Collaborative Program**

Indicate whether the program is offered under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers part of the program.

Defining USISE Plan Mapping Values

Access the USISE Plan Mapping page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Plan Table CDN, USISE Plan Mapping).

USISE Plan Mapping		MET/OUAC Plan Mapping	
Academic Institution:	PSUNV	PeopleSoft University	
Academic Plan:	CNED-QTGR	General CE Grad Quarter Cal	
Find View All First 1 of 1 Last			
Effective Date:	01/01/1900	*Status:	Active
*QUALIF:	03 UG-Prelim	FIN QUALIF:	03 UG-Prelim
AWABOD:	Degree	*HONIND:	Single Hon
*QUACOD:	081 Agricultur	SESTYP:	Cal Year
SPEMAJ:	00000 Gen Arts&S	*SESTOT:	01
*NORMCR:	0002		

USISE Plan Mapping page

QUALIF

Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. The system reports this value in the Fall submission.

FIN QUALIF

Enter the government code for qualification being sought. This field prompts against the Can Report QUALIF table. FIN QUALIF values are reported in all submissions excluding the one in the Fall.

AWABOD

Enter the government code that represents the body awarding diploma or certificate.

HONIND

Enter the government code that represents the honors program indicator.

QUACOD

Enter the government code for coded title of qualification. This field prompts against the Can Report QUACOD table.

SESTYP

Enter the government code that represents the type of session.

SPEMAJ

Enter the government code for specialization or major field of study. This field prompts against the Can Report SPEMAJ table.

SESTOT

Enter the government code that represents the total number of sessions required to compete the program.

NORMCR

Enter the government code that represents the normal credit/course/unit requirements.

Defining MET/OUAC Plan Mapping Values

Access the MET/OUAC Plan Mapping page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, Academic Plan Table CDN, MET/OUAC Plan Mapping).

The screenshot displays the 'MET/OUAC Plan Mapping' page. At the top, there are two tabs: 'USISE Plan Mapping' and 'MET/OUAC Plan Mapping'. Below the tabs, the 'Academic Institution' is set to 'PSUNV' (PeopleSoft University) and the 'Academic Plan' is 'CNED-QTGR' (General CE Grad Quarter Cal). A navigation bar shows 'Find | View All' and 'First 1 of 1 Last'. The 'Effective Date' is '01/01/1900' and the 'Status' is 'Active'. The page is divided into two main sections: 'MET Reporting' and 'OUAC Reporting'. Under 'MET Reporting', there are fields for 'FORPOS' (101, U-Agriculture), 'FT Load' (5.000), 'Annual Weight' (06.000), 'Term Weight' (7.000), 'MET Form Fee' (0008), 'Min BIU' (1.000), and 'Max BIU' (9.000). Under 'OUAC Reporting', there is a field for 'UPREG' (4). At the bottom right, there is an 'Ineligible BIU' checkbox.

MET/OUAC Plan Mapping page

FORPOS (formula program of study)	Enter the government code that represents the formula program of study.
UPREG (university and program registration)	Enter the government code that represents the university and program in which the applicant registers.
FT Load	Enter the full time load for an academic program and plan as the institution defines it.
Annual Weight	Established by MET and based on the FORPOS code. Weight varies for diploma and degree programs. Weights also differ from one institution to another for institution specific FORPOS codes.
Term Weight	Enter a value that the system uses when calculating the annual business income unit (BIU) for graduate levels.
Met Form Fee	Established by MET, based on the FORPOS code.
Min BIU (minimum business income unit)	Enter the minimum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.

Max BIU (maximum business income unit)	Enter the maximum BIU that a graduate student can generate for an institution. This is independent of the actual number of years that the individual requires to complete his or her program of study.
Ineligible BIU (ineligible business income unit)	Select this check box to indicate the academic program and plan is ineligible and the system should therefore not include it in the calculation of FTE (full time equivalency).

Defining CIS Program, Plan, and Subplan Tables

To set up CIS program, plan, and subplan tables, use the CIS Program Table component (CAN_CIS_PROG), CIS Plan Table component (CAN_CIS_PLAN), and the CIS Subplan Table component (CAN_CIS_SUBPLAN).

This section discusses how to:

- Define the CIS program table.
- Define the CIS plan table.
- Define the CIS subplan table.

Pages Used to Define CIS Program, Plan and Subplan Values

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CIS Program Table	CAN_CIS_PROG	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Program Table, CIS Program Table	CIS: Define the CIS program table.
CIS Plan Table	CAN_CIS_PLAN	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Plan Table, CIS Plan Table	CIS: Define the CIS plan table.
CIS Subplan Table	CAN_CIS_SUBPLAN	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Subplan Table, CIS Subplan Table	CIS: Define the CIS subplan table.

Defining the CIS Program Table

Access the CIS Program Table page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Program Table, CIS Program Table).

CIS Program ID Enter the nine-digit CIS program ID. This is a unique and permanent identifier for the specified institution and program.

Major Field 1 Enter the description of the major field of study.

Defining the CIS Plan Table

Access the CIS Plan Table page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Plan Table, CIS Plan Table).

CIS Program ID Enter the nine-digit CIS program ID. This is a unique and permanent identifier for the specified institution, program and plan.

Major Field 1 Enter the description of the major field of study.

Defining the CIS Subplan Table

Access the CIS Subplan Table page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, CIS Subplan Table, CIS Subplan Table).

CIS Program ID Enter the nine-digit CIS Program ID. This is a unique and permanent identifier for the specified institution, program, plan, and subplan.

Major Field 2 Enter the description of the minor field of study.

Defining PSIS Course Data

To set up PSIS course data, use the PSIS Course Data component (CAN_RPT_CRSE).

This section discusses how to define PSIS course data.

Page Used to Define PSIS Course Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PSIS Course Data	CAN_RPT_CRSE	Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Course Data, PSIS Course Data	PSIS: Define PSIS course data.

Defining PSIS Course Data

Access the PSIS Course Data page (Records and Enrollment, Government Reporting Canada, Academic Structure Tables, PSIS Course Data, PSIS Course Data).

Delivered Under Contract	Indicate whether the course is created and delivered under contract by the institution to an outside party. Values are <i>N/A</i> , <i>No</i> , <i>Unknown</i> , and <i>Yes</i> .
Brokered Course	Indicate whether the course is brokered.
Retraining/Skills Upgrade	Indicate whether the course is for workplace retraining or skills upgrade.
Cost Recovery	Indicate whether this is a cost recovery course.
Province	Enter the province that corresponds to the province course funding code. This field controls the view of the CAN_PROV_FND CRS record.
Prov Fund Cd (province funding code)	Enter the provincial code that indicates the course funding code.

Mapping Canadian School Codes to External Organizations

To set up Canadian school code mapping, use the External School Table component (CAN_GOV_SCHOOL).

This section discusses how to map Canadian school codes to external organizations.

Page Used to Map Canadian School Codes to External Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Canadian External School	CAN_EXT_SCHOOL	Records and Enrollment, Government Reporting Canada, Definitions, External School Table, Canadian External School	CIS, PSIS: Map Canadian school codes to external organizations. In add mode, specify an External Org ID and Report Type.

Mapping Canadian School Codes to External Organizations

Access the Canadian External School page (Records and Enrollment, Government Reporting Canada, Definitions, External School Table, Canadian External School).

Institution Code Enter the institution code to which you want to map the external organization ID and school type.

Defining PSIS Student Data

This section discusses how to:

- Define Canadian biographical details.
- Define PSIS transfer credit type data.
- Define PSIS previous education external data.
- Define PSIS student program data.
- Define PSIS student enrollment data.

Pages Used to Define PSIS Data for Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Regional	SCC_BIO_DEMO_REG	Campus Community, Personal Information, Add/Update a Person, Regional	PSIS: Define Canadian Bio/Demo data.

Page Name	Definition Name	Navigation	Usage
Courses and Degrees	SAD_EXT_EDUCATION2	Student Recruiting, Maintain Prospects, Academic Information, Education, Courses and Degrees	PSIS: Define transfer credit data.
Regional	SAD_EXT_EDUC_REG	Records and Enrollment, Transfer Credit Evaluation, External Education, Regional	PSIS: Define previous education information.
Cdn Student Program (Canadian student program)	CAN_RPT_STD_ENR	Records and Enrollment, Career and Program Information, Student Program/Plan, Cdn Student Program	PSIS: Define student program data.
Cdn Student Enrollment (Canadian student enrollment)	CAN_RPT_STDNT_CRSE	Records and Enrollment, Enroll Students, Enrollment, Cdn Student Enrollment	PSIS: Define student enrollment data.

Defining Canadian Biographical Details

Access the Regional page (Campus Community, Personal Information, Add/Update a Person, Regional).

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding a Person to Your Campus Solutions Database," Adding or Updating Biographical Details Data

Defining PSIS Transfer Credit Type Data

Access the Courses and Degrees page (Student Recruiting, Maintain Prospects, Academic Information, Education, Courses and Degrees).

Specify a transfer credit type value.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Tracking External Education," Entering External Courses and Degrees

Defining PSIS Previous Education External Data

Access the Regional page (Records and Enrollment, Transfer Credit Evaluation, External Education, Regional).

Specify previous educational activities and postsecondary credential information.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Tracking External Education," (CAN) Entering Regional Data

Defining PSIS Student Program Data

Access the Cdn Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Cdn Student Program).

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees	Cdn Student Program
Kimberly Adams					
Academic Career: Undergraduate		AA0001	★		
Student Career Nbr: 0		Career Req. Term 1997 Fall			
Find View All First 1 of 1 Last					
Status:	Active in Program	Admit Term:	1997 Fall		
Effective Date:	01/01/1900	Effective Sequence:	0		
Program Action:	Activate	Action Date:	06/29/1998		
Action Reason:	Matriculation	Requirement Term:	1997 Fall		
Academic Program:	Liberal Arts Undergraduate	PeopleSoft University			
Cost Recovery Prog:		Brokered Program:		Co-op Program:	
Collaborative Prog:		Articulated Program:		Comp. Opt. Paid OJT:	
Comp. Man. Paid OJT:		Comp. Opt. Unpaid OJT:		Comp. Man. Unpaid OJT:	
Met Norm Entrance Reqmt:		Special Initiative Code:			

Cdn Student Program page

- Cost Recovery Prog (cost recovery program)

Indicate whether the student is taking the program on a cost recovery basis.
- Brokered Program

Indicate whether the student is taking the program under a brokering agreement or study agreement whereby the institution that owns the program contracts the delivery of all or part of the program to a host institution.
- Co-op Program

Indicate whether the student is classified as a co-op student in this program.

Collaborative Program	Indicate whether the student is taking the program under a collaborative agreement, whereby two or more institutions share ownership or responsibility for the program and each delivers parts of the program.
Articulated Program	Indicate whether, on completion of the credits for the program, the student is entitled to advanced standing in a target program in another institution with which the reporting institution has an articulated transfer agreement.
Comp. Opt. Paid OJT (completed optional paid on the job training)	Indicate whether the student has completed the optional paid OJT requirements for the program.
Comp. Man. Paid OJT (completed mandatory paid on the job training)	Indicate whether the student has completed the mandatory paid OJT requirements for the program.
Comp. Opt. Unpaid OJT (completed optional unpaid on the job training)	Indicate whether the student has completed the optional unpaid OJT requirements for the program.
Comp. Man. Unpaid OJT (completed mandatory unpaid on the job training)	Indicate whether the student has completed the mandatory unpaid OJT requirements for the program.
Met Norm Entrance Reqmt (met normal entrance requirement)	Indicate whether the student met the normal entrance requirements of the program.
Special Initiative Code	Indicate the special initiative code associated with the student in the program as specified by the provincial ministry, institution, or other agency. This field prompts against the CAN_PROV_SP_INT record.

Defining PSIS Student Enrollment Data

Access the Cdn Student Enrollment page (Records and Enrollment, Enroll Students, Enrollment, Cdn Student Enrollment).

Student Enrollment 3 | Student Enrollment 4 | Last Enrollment Action | **Cdn Student Enrollment** | NLD Student Paper

Kimberly Adams AA0001 ★

Term: 2003 Fall Career: Undergrad Institution: PeopleSoft University

Find | View All First 1 of 1 Last

Class Nbr: []

Subject: [] Catalog Nbr: [] Class Section: []

Academic Group: [] Session: []

Cost Recovery Course: Unknown [v] Brokered Course: Yes-Host [v]

Delivery to Student

Dist. Ed:	[v]	Class:	[v]	TV:	[v]
Internet:	Unknown [v]	Correspondence:	[v]	Radio:	[v]
Video Conf.:	[v]	Audio Conf.:	[v]	Other:	[v]

Cdn Student Enrollment page

Cost Recovery Course

Indicate whether the student took the course on a cost recovery basis. The system populates this field by default to the CAN_RPT_CRSE record.

Brokered Course

Indicate whether the student is taking the course under a brokering agreement, whereby the institution that owns the course contracts the delivery of the course to a host institution. The system populates this field by default to the CAN_RPT_CRSE record.

Dist. Ed. (distance education)

Indicate whether the student's course section or class is considered by the institution to be a distance education course. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Class

Indicate whether the student received instruction in this course in whole or in part by classroom instruction (including labs), in which the instructor was physically located in the same room or lecture hall as the student. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

TV (television)

Indicate whether the student received instruction in this course in whole or in part by television. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Internet

Indicate whether the student received instruction in this course in whole or in part on the internet, including email and internet conferencing. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Correspondence

Indicate whether the student received instruction in this course in whole or in part by postal correspondence, including tapes and CDs sent by mail. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Radio

Indicate whether the student received instruction in this course in whole or in part by radio. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Video Conf. (video conference)

Indicate whether the student received instruction in this course in whole or in part by video conferencing, excluding conferencing on the internet. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Audio Conf. (audio conference)

Indicate whether the student received instruction in this course in whole or in part by audio conferencing. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Other

Indicate whether the student received instruction in this course in whole or in part by some other method of instruction. Mapping needs to be completed at this level only if the student received instruction for the course in a manner different from the course delivery mode.

Loading the Student ID Table

This section discusses how to load the student data.

Page Used to Load the Student ID Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student List	CAN_STDNT_LST	Records and Enrollment, Government Reporting Canada, Suspense Tables, Student List, Student List	All: Load student data to prepare for the extract process.

Loading Student Data

Access the Student List page (Records and Enrollment, Government Reporting Canada, Suspense Tables, Student List, Student List).

Student List

Institution:	PSUNV	PeopleSoft University
Report Type:	PSIS	Postsecondary Student Info Sys
Report Period:	200910	PSIS Test Report
Student ID:	SRCR0009	Ruth Williams

Freeze Date:

Find | View All First 1 of 1 Last

*Acad Career:	UGRD	Undergraduate	☒ Select
*Acad Prog:	LAU	Liberal Arts Undergraduate	
*Acad Plan:	PSYCH	Psychology	

Find First 1-12 of 12 Last

*Field Name:	ACAD_CAREER	Field Value:	UGRD
*Field Name:	ACAD_PLAN	Field Value:	PSYCH
*Field Name:	ACAD_PROG	Field Value:	LAU
*Field Name:	ACAD_SUB_PLAN	Field Value:	1
*Field Name:	ADM_APPL_NBR	Field Value:	1
*Field Name:	AID_YEAR	Field Value:	1999

Student List page

Each institution's business practices and interpretation of the published government rules result in different criteria for selecting students for reporting. To initiate the reporting process, you must populate (either manually or through a user-defined process) the PeopleSoft provided Student List component with the eligible students you want to report. The Student List component contains the fields listed below. You must populate each field for *every* row in this component; otherwise the reports extract process will exclude the row and the process may fail.

Institution Enter the institution for which you want to report.

Report Type Enter the report type you want to use.

Report Period Enter the report period.

Student ID Enter the student ID for the student you want to report.

Acad Career (academic career) Enter the academic career you want to report for the student. You can insert an additional row to report multiple careers, programs, or plans.

Acad Program (academic program)	Enter the academic program you want to report for the student.
Acad Plan (academic plan)	Enter the academic plan you want to report for the student.
Select	Select this check box to identify a subset of students for whom you want to run the extract and flat file process. The extract process adds or replaces reporting data for these students. The system clears this check box after you run the extract process for this report. At runtime, you can specify to run the process for only those students who have the Select option selected.
Field Name	Enter a row for each field name that you need for this report. For example, STDNT_CAR_NBR. This is the key data referred to in the following Loading the Student Key Data subtopic.
Field Value	Enter a field value that corresponds to each field name value. The report extract process uses this data. For example, 0.

The system calculates elements for each row of the table. There is a one to one relationship between a row on the Student List page and a row on any one of the tables that enable you to view the information calculated by the extract program. If a student has more than one row on the Student List page, the system treats each row as if it is for a new student when retrieving the element values for the row.

Loading the Student Key Data

In addition to entering data in all of the header fields, different government reports require that you also enter various types of key data. Use the following table to determine which fields and corresponding field values you must populate before you run the extract process:

Field Name	Required by Report Type
ACAD_CAREER	ALL
ACAD_PROG	ALL
ACAD_PLAN	ALL
ACAD_SUB_PLAN	CIS
ADM_APPL_NBR	OUAC
AID_YEAR	CIS, PSIS
APPL_PROG_NBR	OUAC

<i>Field Name</i>	<i>Required by Report Type</i>
EFFECTIVE_TERM	CIS, PSIS, MET, USISE
EFFSEQ	OUAC
SESSION_CODE	CIS, MET, OUAC, USISE
STDNT_CAR_NBR	ALL
STRM	ALL

Note. Enter the latest STRM value for the student for the applicable report type and report period. For example, if the report includes terms for Spring 99 and Fall 99, enter the term representing Fall 99 as the STRM value, assuming that the student was enrolled in both terms.

Chapter 18

(NZL) Setting Up Government Reporting

This chapter provides an overview of New Zealand government reporting, lists prerequisites, and discusses how to:

- Prepare for Single Data Return (SDR) reporting.
- Prepare for New Zealand Qualifications Authority (NZQA) reporting.
- Prepare for New Zealand Vice Chancellor's Committee (NZVCC) reporting.

Understanding New Zealand Government Reporting

This section discusses:

- SDR reporting.
- NZQA reporting.
- NZVCC reporting.

SDR Reporting

The SDR is a set of data elements that tertiary institutions in New Zealand must provide to the New Zealand Ministry of Education (MoE). The SDR includes all information that is required by the MoE for funding students and for statistical reporting.

The SDR business process flows like this:

1. You use the PeopleSoft system to enter and store the SDR data on students, courses, and course enrollments.
2. You use the SDR Extract component to extract the necessary data that is required by the MoE into five separate text files: student, course enrollment, web-based system register, qualifications, and course completion.
3. The MoE provides institutions with a program that validates the text files that you produced through the SDR Extract component.
4. After you send the validated text files to the MoE, the MoE processes the files and calculates the appropriate level of funding based on the files that your institution provides them.

A key part of the SDR reporting process is the reporting of data that is required by the EFTS (Equivalent Full Time Student) Funding System, through which the MoE provides funding grants for tertiary education providers. The funding, or bulk grant, that an institution receives is determined by a funding formula based on an EFTS unit, whereby 1.0 EFTS unit is defined as the student workload that would normally be carried by a full-time student in a single academic year.

To comply with the EFTS system requirements, institutions must assign an EFTS factor to all eligible courses. This factor identifies the proportion of a normal full-time year's study that the course is deemed to represent. The EFTS factor also depends on the type of course according to ministry guidelines. When students enroll in courses, they generate EFTS units that are equivalent to the factor that is defined for the course. These units, usually based on course characteristics, program characteristics, or both must also be coded using the New Zealand Standard Classification of Education for SDR reporting purposes.

NZQA Reporting

The NZQA is a government body that is responsible for the coordination of national examinations and the National Qualification Framework (NQF). Qualifications are registered at 10 levels, from year 11 of schooling or vocational entry to postgraduate. Educational institutions, primarily polytechnic colleges, need to equate their study offerings to the NQF unit standards. Progression in these unit standards must be recorded and institutions must award students grades not only in their course offerings, but also in these unit standards.

You set up unit standards in your system as milestones. Milestones are then linked to the courses that are offered by your institution. You can link more than one unit standard to a course or one unit standard to many courses. As students enroll in the courses that are linked to the milestones, they are simultaneously enrolled in the unit standard through the enrollment engine.

After enrollments are processed, you can run three different reports to send to the NZQA:

- **Hook-on Request report:** This report provides a listing of all students who have not previously been registered with NQF and have paid the hook-on fee.
- **Unit Standard Results report:** This report includes Unit Standard results (complete or not completed) for students who have paid the per credit fees.
- **NZ Diploma in Business Results report:** This report provides paid NZQA exam results for the NZ Diploma in Business and for advanced vocational awards.

NZVCC Reporting

The NZVCC was established by the Universities Act (1961), which replaced the Federal University of New Zealand with separate institutions. Today, the committee represents the interests of New Zealand's seven institutions: Auckland, Waikato, Massey, Victoria, Canterbury, Lincoln, and Otago.

The NZVCC requests the above seven institutions to provide a data file on destinations of those persons who became eligible to graduate from the New Zealand University system. This information is produced at the end of the year (31 December) or year-end for the institution and is used by the NZVCC in creating a University Graduate Destinations Survey. The University Graduate Destinations Survey includes names and details of all students who completed a qualification in the specified year at the institution. When a student has completed a degree, your institution manually inserts a row in the Student Degrees component.

Ethnicity information is included in the University Graduate Destinations Survey report. Ethnicity codes should already be set up and mapped in your system because this is required for the SDR report.

Before you can generate the University Graduate Destinations Survey report file, you must also enter a valid address type for a student's address and residency data. Valid address types are listed in the Addresses group box on the Campus Community Installation - Names/Addresses page.

Prerequisites

In addition to the setup that is described in this chapter, your institution must also set up the following tables for New Zealand functionality:

- Academic Institution 6 page.
- Institution Table New Zealand page.
- Academic Prog (NZL) (academic program [New Zealand]) page.
- Acad Plan (NZL) (academic plan [New Zealand]) page.
- Degree Table page.
- Complete Grade Flag page.
- Grade Scheme Table page.
- Ethnicity NZL page.
- Ethnicity Map NZL page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," (AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Programs.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Plans.

See [Chapter 13, "Setting Up Degrees and Honors," Defining Degrees, page 306.](#)

See [Chapter 12, "Setting Up Grading," Setting Up Your System for Grading, page 288.](#)

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Biographical Information," (NZL) Setting Up Statistics New Zealand Ethnic Codes.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Biographical Information," (NZL) Mapping Statistics New Zealand Ethnic Codes to PeopleSoft Ethnic Groups.

Preparing for SDR Reporting

This section discusses how to:

- Define funding categories.
- Define course classifications.

- Define MoE subject codes.
- Set up field of study codes.

Pages Used to Prepare for SDR Reporting

Page Name	Definition Name	Navigation	Usage
Funding Category NZL	SSR_FUND_CAT_NZL	Set Up SACR, Foundation Tables, Reporting Codes, Funding Category NZL, Funding Category NZL	Define funding category codes and their amounts.
Course Classification NZL	SSR_CRS_CLSF_FNDC	Set Up SACR, Foundation Tables, Reporting Codes, Course Classification NZL, Course Classification NZL	Define course and program classifications and associate them with funding categories.
MoE Subject NZL	SSR_MOE_SUBJECT	Set Up SACR, Foundation Tables, Reporting Codes, MoE Subject NZL, MoE Subject NZL	Define MoE subject codes.
NZSCED Field of Study	SSR_NZSCED_BRD	Set Up SACR, Product Related, Student Records, Curriculum Management, NZSCED Field of Study NZL, NZSCED Field of Study	Set up the NZSCED (New Zealand Standard Classification of Education) field of study codes by defining the broad, narrow, and detail codes that you will attach to courses for use in SDR Course and Course Register files.

Defining Funding Categories

Access the Funding Category NZL page (Set Up SACR, Foundation Tables, Reporting Codes, Funding Category NZL, Funding Category NZL).

Funding Category NZL

Funding Category: A2

Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1900

***Status:** Active

***Description:** Arts & Soc Sci - Degree

Funding Amount: \$1,000.00

Funding Category NZL page

Funding Category

When setting up your funding categories, enter the two-digit alphanumeric code for the funding category.

The first digit is the academic category (A-Z) and the second digit is the degree status (1-5). The degree status variations are:

- 1: Non-Degree
- 2: Degree
- 3: Post Graduate
- 4: Research
- 5: Foreign Research

Funding Amount

Enter the MoE funding amount for this funding category.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Programs

Defining Course Classifications

Access the Course Classification NZL page (Set Up SACR, Foundation Tables, Reporting Codes, Course Classification NZL, Course Classification NZL).

Course Classification NZL

Course Classification: 02

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1900

*Status:

Active

*Classification Type:

Course

*Description:

Architecture; Quantity Surveying

*Long Description:

Architecture; Quantity Surveying

Find

First 1-2 of 2 Last

*Funding Category:

A1

Arts & Soc Sci - Non-Degree

*Funding Category:

B1

Science & Enginrg - Non-Degree

Course Classification NZL page

Course Classification	When setting up your classification codes, enter the MoE course classification code.
Classification Type	Select <i>Course</i> or <i>Programme</i> .
Funding Category	Enter the funding category for this course classification. You can enter as many funding categories as needed for each classification. Note. You must assign at least one funding category to each course classification.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Programs

Defining MoE Subject Codes

Access the MoE Subject NZL page (Set Up SACR, Foundation Tables, Reporting Codes, MoE Subject NZL, MoE Subject NZL).

Link these subject codes to your institution's plan offerings on the Academic Plan page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Plans.

Setting Up Field of Study Codes

Access the NZSCED Field of Study page (Set Up SACR, Product Related, Student Records, Curriculum Management, NZSCED Field of Study NZL, NZSCED Field of Study).

Important! The NZSCED broad, narrow, and detail codes are defined by the MoE.

NZSCED Field of Study

NZSCED Broad Code: 01

NZSCED Broad Code

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1900

Status:

Active

*Description:

Natural and Physical Sciences

NZSCED Narrow Code

Find | View All

First 1 of 2 Last

*NZSCED Narrow Code:

01

*Description:

Mathematical Sciences

Customize | Find

First 1-2 of 2 Last

	*Detail Code	*Description	Full Code		
1	01	Mathematical Sciences	010101	+	-
2	03	Statistics	010103	+	-

NZSCED Field of Study page

- NZSCED Broad Code**

When setting up the field of study codes, enter the NZSCED broad code for this field of study.
- NZSCED Narrow Code**

Enter the NZSCED narrow codes for the broad code.
Insert rows to enter all of the narrow codes for this broad code.
- Detail Code**

Enter the NZSCED detail codes for the narrow code.
Insert rows in the grid to enter all of the detail codes for this narrow code.

Note. You attach the combination of broad, narrow, and detail code to a course at the catalog level. For example, the code 010103 is the NZSCED code for Statistics.

See Also

Chapter 6, "Setting Up the Course Catalog," (NZL) Setting Up Government Reporting Data, page 114

Preparing for NZQA Reporting

The NZQA framework consists of fields, subfields, and domains. The codes identify a particular unit standard within the overall framework. You associate milestones with a unit standard using these codes.

This section discusses how to:

- Define NQF fields, subfields, and domains.
- Define unit standards.
- Link NQF codes to milestones.

Pages Used to Prepare for NZQA Reporting

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NQF Field/Subfield Domain	SSR_NQF_FIELD	Set Up SACR, Product Related, Student Records, Curriculum Management, NQF Field/Subfield Domain NZL, NQF Field/Subfield Domain	Set up NZQA defined field codes, subfields, and domains in the system.
Milestone Table	MILESTONE_TBL	Set Up SACR, Product Related, Student Records, Enrollment, Milestone Table, Milestone Table	Define NQF unit standards as milestones using the milestone type of <i>U</i> .
NQF Detail	SSR_MILESTN_NZL	Click the NQF Detail link at the bottom of the Milestone Table page. The link is available only for milestones with the milestone type of <i>U</i> (unit standard).	Link NQF codes to the milestones. Note. Link milestones to courses on the Course/Milestone Link page in the Course Catalog component.

Defining NQF Fields, Subfields, and Domains

Access the NQF Field/Subfield Domain page (Set Up SACR, Product Related, Student Records, Curriculum Management, NQF Field/Subfield Domain NZL, NQF Field/Subfield Domain).

NQF Field/Subfield Domain

Field Code:BUS

Find | View All

First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Business

*Subfield Code:ACC

*Description:Accounting

Customize | Find | View All

First1-2 of 2Last

	*Domain Code	*Description		
1	ACG	Accounting - Generic	+	-
2	ACM	Accounting - Mid-Level	+	-

NQF Field/Subfield Domain page

- Field Code

When setting up a new field, enter an NZQA defined field code.
- Subfield Code

Enter an NZQA-defined subfield code.
You can enter as many subfield codes as needed for this field.
- Domain Code

Enter an NZQA-defined domain code.
You can enter as many domain codes as needed for each subfield.

Defining Unit Standards

Access the Milestone Table page (Set Up SACR, Product Related, Student Records, Enrollment, Milestone Table, Milestone Table).

Enter the milestone type *U* (unit standard) to activate the NQF Detail link at the bottom of the page.

See [Chapter 11, "Preparing to Track Student Data," Defining Milestone Codes, page 279.](#)

Linking NQF Codes to Milestones

Access the NQF Detail page (click the NQF Detail link at the bottom of the Milestone Table page).

NQF Detail	
Academic Institution:	Silver Fern University
Milestone:	NQF7359
Find View All First 1 of 1 Last	
*Effective Date:	01/01/1900  Status:  
Find View All First 1 of 1 Last	
Unit Standard Version:	1  
Unit Standard Field Code:	BUS  Business
Unit Standard Subfield Code:	ACC  Accounting
Unit Standard Domain Code:	ACG  Accounting - Generic
Unit Standard Language:	English 
NQF Credit:	4

NQF Detail page

- Unit Standard Version** Enter the version as defined by the NZQA for this unit standard.
- Unit Standard Field Code** Select the appropriate field code.
Only the field codes that are entered on the Field/Subfield Domain page are available for selection.
- Unit Standard Subfield Code** Select the appropriate subfield code.
Only the subfield codes that are entered on the Field/Subfield Domain page are available for selection.
- Unit Standard Domain Code** Select the appropriate domain code.
Only the domain codes that are entered on the Field/Subfield Domain page are available for selection.
- Unit Standard Language** Select the language in which the unit standard is taught.
- NQF Credit** Enter the number of NQF credits for this unit standard as provided in the National Qualifications Framework.

See Also

Chapter 6, "Setting Up the Course Catalog," (NZL) Setting Up Government Reporting Data, page 114

Preparing for NZVCC Reporting

Enter subject and qualification codes defined by the NZVCC into your PeopleSoft system, and then link the subject codes to your academic plans and the qualification codes to degree codes.

This section discusses how to:

- Enter NZVCC subject codes.
- Enter NZVCC qualification codes.

Pages Used to Prepare for NZVCC Reporting

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NZVCC Subject Codes NZL	SSR_NZVCC_SUBJECT	Set Up SACR, Foundation Tables, Reporting Codes, NZVCC Subject Codes NZL, NZVCC Subject Codes NZL	Define NZVCC Subject codes to attach to academic plans.
NZVCC Qualification Codes NZL	SSR_NZVCC_DEGREE	Set Up SACR, Foundation Tables, Reporting Codes, NZVCC Qualification Codes NZL, NZVCC Qualification Codes NZL	Define NZVCC qualification codes to attach to degrees.

Entering NZVCC Subject Codes

Access the NZVCC Subject Codes NZL page (Set Up SACR, Foundation Tables, Reporting Codes, NZVCC Subject Codes NZL, NZVCC Subject Codes NZL).

Enter the subject codes that are provided by the NZVCC. After you have set up all of the codes, you will link the codes to an academic plan on the Acad Plan NZL (academic plan New Zealand) page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Defining Programs, Plans, and Subplans," (NZL) Setting Up New Zealand Academic Plans.

Entering NZVCC Qualification Codes

Access the NZVCC Qualification Codes NZL page (Set Up SACR, Foundation Tables, Reporting Codes, NZVCC Qualification Codes NZL, NZVCC Qualification Codes NZL).

Enter the qualification codes that are provided by the NZVCC. After you have set up all of the codes, you will link the codes to a degree on the Degree Table page.

See [Chapter 13, "Setting Up Degrees and Honors," Defining Degrees, page 306.](#)

Chapter 19

(NLD) Setting Up Test Administration

This chapter provides an overview of Test Administration setup and discusses how to:

- Activate Test Administration.
- Define tests and calculated results in the catalog.
- Create test trees in Tree Manager.
- Link test trees to programs.
- Set up Default VAVO Combination Grade Courses.
- Create test lists.
- Define evaluation rules.

Understanding Test Administration Setup

The Test Administration functionality enables institutions to create a catalog of tests, similar to the course catalog. The test catalog consists of tests and calculated results. Calculated results either are the end result of a test or can be used to calculate the average result of multiple tests. Tests can be repeated and the repeat rules that are set for a calculated result tell the system which result to use for calculation. The calculation results can be run by individual student, by program, or by student group.

Common Elements Used in This Chapter

Academic Career

Enter the appropriate academic career for the test or calculated result offering, test list, or requisite.

Define careers on the Academic Career Table.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Careers.

Academic Institution

Enter the appropriate academic institution for the test or calculated result offering, test tree, test list, or requisite.

Define institutions on the Academic Institution Table.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Institutions.

Academic Organization

The system populates this field from the academic organization that is linked to the subject entered in the Subject Area field. You can override the value.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Organizations.

Subject Area

Enter the subject area of the test or calculated result offering, test list, or requisite. Subject area values are defined on the Academic Subject Table page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Subject Areas.

Activating Test Administration

Using Test Administration is optional. Activate the functionality on the Installation table.

Page Used to Activate Test Administration

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Activate the Test Administration functionality and enter the last test ID numbers used.

Activating Test Administration

Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

Installation Student Admin	SA Features
Installation Student Administration	
Max. Class Search Results:	50
☒ Warning Message	☐ Error Message - limit search
Class Search Subject Option:	
☒ Drop-Down List Box	☐ Prompt Search
☒ Use SR Class Schedule Facility Conflict Checking	
Australia	
☐ DEST, HECS, Centrelink, TAC	
Canada	
☒ Government Reporting	
New Zealand	
☐ NSI and SDR Personal Data, SDR Degree	
The Netherlands	
☒ Use Dutch Functionality	
☒ Test Administration	Last Test ID Assigned: Last Test List ID Assigned: Last Requirement ID Assigned:

Installation Student Administration - SA Features page

Test Administration

Select to activate the Test Administration functionality.

**Last Test ID Assigned, Last
Test List ID Assigned, and
Last Requirement ID
Assigned**

These fields are visible only when the Test Administration check box is selected.

When you activate Test Administration, enter the number prior to the number with which you want to begin the ID counting for these fields. For example, if you enter 99 in each of these fields, the system will begin assigning the ID for each at 100.

After activation, these fields display the last test, test list, and requirement ID numbers that are assigned by the system.

Note. If you leave these fields blank, the system begins counting for each of these IDs with 1.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Reviewing Installation Setup and System Defaults," Selecting Student Administration Installation Options

Defining Tests and Calculated Results in the Catalog

In the test catalog, define all of the tests that will be used in test programs. Also define calculated results, which link tests and other calculated results together with calculation rules for the system to use to calculate final test grades for students.

Calculated results can also be linked to the course catalog so that completed grades can be written to the student enrollment record.

This section discusses how to:

- Define tests.
- Define test offerings.
- Define a test set for calculated results.
- Link a course to the test.

Pages Used to Define Tests and Calculated Results in the Catalog

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Catalog	SSR_TST_CAT_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Test Catalog	Create, view, or update tests or calculated results.
Test Catalog - Offering	SSR_TST_CAT_OF_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Offering	Define the academic institution, group, catalog number, career, and subject for the test or calculated result.
Test Catalog - Test Set	SSR_TST_CAL_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Test Set	This page appears when <i>Calculated Result</i> is entered in the Test Type field on the Test Catalog page. Link the calculated result to tests and other calculated results from which the grade is calculated, and enter information about the calculated result.

Page Name	Definition Name	Navigation	Usage
Course Link	SSR_TST_CRS_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Course Link	This page appears when <i>Calculated Result</i> is entered in the Test Type field on the Test Catalog page. Link the calculated result to a course.

Defining Tests

Access the Test Catalog page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Test Catalog).

The screenshot shows the 'Test Catalog' page with the following details:

- Test ID:** 00000088
- Effective Date:** 01-08-2003
- Status:** Active
- Test Type:** Calculated Result
- Exam Type:** Combination Grade
- Description:** Combination Grade Havo Vavo
- Long Title:** Combination Grade Havo Vavo
- Grading Basis:** TSC
- Units 1:**
- Units 2:**
- Test Level:** A level
- *Grade Valid:** Years After Term End
- Years Valid:** 10

Test Catalog page

Test Type

When entering a new value in the catalog, select whether you are creating a *Test* or a *Calculated Result*.

When you save the test or calculated result, this field becomes view only.

Exam Type	Select the exam type for this calculated result. Values are <i>Central End Exam</i>, <i>Combination Grade</i>, <i>End Exam</i>, <i>Partial Qualification</i>, <i>Qualification</i>, and <i>School Exam</i>. The exam type affects Test Administration grade calculation processing. If you select an Exam Type of <i>Combination Grade</i> for a calculated result, the grade calculation process looks for underlying student results where the Combination Grade check box on the Student VAVO Course Details page is selected. If the Combination Grade check box is selected, the underlying grade counts towards the overall Combination Grade. If the check box is cleared, the underlying result is managed in a way similar to a course exemption—the underlying results are exempted and the Student Grade table results Grade Attribute field is updated with the grade attribute <i>Exempt Combination Grade</i>. See Chapter 21, "(NLD) Managing Test Administration," Maintaining VAVO Course Options, page 515.
Grading Basis	Select the grading basis to be used with this test or calculated result.
Units 1 and Units 2	Enter the number of units that the student will be credited after completing the test or calculated result. These fields are used in the evaluation process based on how each individual institution needs to use them.
Test Level	Select the level of difficulty of the test or calculated result. Values are <i>A level</i>, <i>B level</i>, <i>C level</i>, and <i>D level</i>. These levels are used for reporting purposes only and are not part of the calculation process.
Grade Valid	Select the period for which the grade is valid. Values are <i>Unlimited</i> and <i>Years After Term End</i> . If you select <i>Years After Term End</i> , the Years Valid field appears.
Years Valid	Enter the number of years that the grade assigned to a student for this test or calculated result is valid. This field appears if you select <i>Years After Term End</i> in the Grade Valid field.

Defining Test Offerings

Access the Test Catalog - Offering page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Offering).

Test Catalog	Offering	Test Set	Course Link
Test ID: 00000008			
Find View All First 1 of 1 Last			
Effective Date: 01/01/1900		Status: Active	
Description: CAL02.1.3 Sports			
*Academic Institution: PSNLD		PeopleSoft University - NLD *Catalog Nbr: 4330CAL021	
*Academic Group: 00001		Standard	
*Subject Area: ECONO		Economics	
*Academic Organization: ECONOMCS		Economics	
*Academic Career: BOL		Vocational Training (NLD)	
HEGIS Code:		*Approved Approved	
Long Description: SP			

Test Catalog - Offering page

Catalog Nbr (catalog number) Enter the catalog number for this test or calculated result.

This field is 10 digits. The system reserves the 4 left digits exclusively for numeric characters, and the right 6 digits for both alpha and numeric characters. A field edit enforces this programming.

See Chapter 6, "Setting Up the Course Catalog," *Defining Course Offerings*, page 100.

Academic Group

Enter the academic group to which this test or calculated result offering belongs. Academic group values are defined on the Academic Group Table page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," *Defining Academic Groups*.

HEGIS Code

Enter the CREBO code that is associated with the test.

Approved

Select the test or calculated result approved status. Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Select *Pending* or *Denied* to prevent anyone from scheduling the test or calculated result. Select *Approved* to enable scheduling of the test or calculated result offering.

Long Description

Enter a long description of the test.

The text in this field can be used in crystal reports.

Defining a Test Set for Calculated Results

Access the Test Catalog - Test Set page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Test Set).

Test Catalog

Offering

Test Set

Course Link

Test ID:

00000008

Find | View All

First 1 of 1 Last

Effective Date:

01/01/1900

Status:

Active

Description:

CAL02.1.3 Sports

*Representation:

Truncate

*Decimals:

1

*Handle Insufficient Grades:

Exclude from Calculation

☐ Use Only Grades within Term

☐ Sum Grades

Customize | Find | View All

First 1-3 of 3 Last

*Seq Nbr	Weight	*Child Test ID	Description	Test Type	Operators	Minimum Value	Repeat		
10	03	00000003	CAL02.1.3.3 Sports	Test	=	89.00	Highest	+	-
20	01	00000006	CAL02.1.3.2 Sports	Test			Highest	+	-
30	01	00000007	CAL02.1.3.1 Sports	Test			Highest	+	-

Test Catalog - Test Set page

Representation

Select whether to *Round* or *Truncate* the calculated result.

Decimals

Select the number of decimals to which the calculated result must be rounded or truncated. Values are *0*, *1*, and *2*.

Handle Insufficient Grades	Indicate how you want the calculation process to handle empty grades and grades that do not meet the minimal value. Values are: <i>Conditional:</i> Only grades that satisfy the minimum value are used in the calculation process. <i>Do Not Calculate:</i> If grades exist that do not meet the minimum value or if required grades do not exist, the result is not calculated. <i>Exclude from Calculation:</i> If no grade exists, the grade is not used in the calculation process. If the grade is below the minimum value, the grade is used in the calculation process. <i>Include in Calculation:</i> If no grade exists, the minimal value from the corresponding grade table is used in the calculation process. For all values except <i>Do Not Calculate</i>, if all requirements are met and all required grades exist, the grade is calculated with the status Complete, otherwise, with the status Incomplete.
Use Only Grades within Term	Select if only the tests taken within the same term will be included in the result.
Sum Grades	Select if the calculated result of all underlying tests will be a sum of the tests instead of an average.
	Note. The calculation process calculates an average of all test grades if this check box is cleared.
Seq Nbr (sequence number)	When you add a new row, the system increments this field by 10; however, you can change the value to any number to change the order of the rows.
Weight	Enter the weight of the test compared to the other tests in the grid.
Child Test ID	Enter the test ID or other calculated result ID that you want in the test set of the calculated result.
Operators	Select an operator to determine the minimum grade that a student must earn in a test for it to be used in the calculation process. Values are = (equal to), > (greater than), and >= (greater than or equal to).
Minimum Value	Enter the minimum grade that a student must earn in a test for it to be used in the calculation process.
Repeat	Indicate which test result must be considered if a student has repeated the test. Values are <i>Average</i> , <i>Highest</i> , and <i>Latest</i> .

Linking a Course to the Test

Access the Test Catalog - Course Link page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Catalog, Course Link).

Test Catalog

Offering

Test Set

Course Link

Test ID:

00000008

Find | View All

First 1 of 1 Last

Effective Date:

01/01/1900

Status:

Active

Description:

CAL02.1.3 Sports

Course ID:

Course Offering Nbr:

Create/Update Student Enroll

☐ Create

☒ Update Existing Only

Test Catalog - Course Link page

- Course ID

Enter the course ID, from the Course Catalog, of the course to which this test or calculated result will be linked.
- Course Offering Nbr (course offering number)

Enter the course offering number to which this test or calculated result will be linked.

Create/Update Student Enroll

- Create

Select to have the calculation process create a new row on the Student Enroll table.
- Update Existing Only

Select to have the calculation process update the existing row on the Student Enrollment table.

Creating Test Trees in Tree Manager

The Create Test Tree process creates test trees based on the information that you enter in the Test Catalog. The system then uses the structure of a test tree to calculate test grades for students.

This section discusses how to:

- Create a test tree.
- Validate test trees.
- View tree validation results.

See Also

PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Create Test Trees

Page Name	Definition Name	Navigation	Usage
Create Test Tree	SSR_CRE_TRE_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Create Test Tree, Create Test Tree	Run the Create Test Tree SQR process (SRCRTRNL) to create a test tree. Note. Create and update test trees using only this process. Do not create new test trees or add nodes to existing test trees through Tree Manager.
Validate Test Tree	SSR_VALID_TRE_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Validate Test Tree, Validate Test Tree	Run the Test Tree Validation SQR process (SRVALDNL) to validate the test tree. A test tree is valid when the structure of the tree in Tree Manager matches the structure of the tree in the Test Catalog.
View Tree Validation Results	SSR_TEST_TREE_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, View Tree Validation Results, View Tree Validation Results	View test tree validation results.

Creating a Test Tree

Access the Create Test Tree page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Create Test Tree, Create Test Tree).

Create Test Tree

Run Control ID: Test

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PSNLD

PeopleSoft University - NLD

*Test ID:

00000008

CAL02.1.3 Sports

*Effective Date:

01/01/1900

*Tree Structure ID:

TEST_ADMIN

nl_testadministratie

*Tree Name:

TEST

Create Test Tree page

Test ID	Enter the calculated result that will be the root node of the tree. The system creates the tree using the tests and other calculated results that you linked to this calculated result on the Test Set page. Only those test IDs for which a user has access based on academic organization security are available.
Effective Date	Enter the effective date of the test tree. Assigning the test tree an effective date enables the user to record different versions of calculated results.
Tree Structure ID	The test structure TEST_ADMIN is delivered with the product. If you create additional tree structures, they must be set up exactly like the TEST_ADMIN structure.
Tree Name	Enter a name for the test tree.

Validating Test Trees

Access the Validate Test Tree page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Validate Test Tree, Validate Test Tree).

Validate Test Tree

Run Control ID: Test

[Report Manager](#) [Process Monitor](#) Run

*Academic Institution:

PSNLD

PeopleSoft University - NLD

*Tree Name:

TEST

CAL02.1.3 Sports

*Effective Date of Tree:

01/01/1900

Validate Test Tree page

- Tree Name

Enter the name of the test tree for the system to validate.
- Effective Date of Tree

Enter the effective date of the tree. Test trees can have multiple effective dates to accommodate several versions of the same test tree.

Viewing Tree Validation Results

Access the View Tree Validation Results page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, View Tree Validation Results, View Tree Validation Results).

View Tree Validation Results

Academic Institution:

PSNLD

PeopleSoft University - NLD

Tree Structure ID:

TEST_ADMIN

nl_testadministratie

Tree Name:

TEST

CAL02.1.3 Sports

Effective Date of Tree:

01/01/1900

Find | View All

First

1 of 1

Last

Tree Validation Result:

Validated

Date Data Validated:

01/21/2005

View Tree Validation Results page

Linking Test Trees to Programs

Link test trees to programs to automate the process of linking students to test trees. When an applicant is matriculated, the system looks at the combination of institution, career, program, campus, load, and term for the individual and automatically links the student to the test tree with the same combination.

Page Used to Link Test Trees to Programs

Page Name	Definition Name	Navigation	Usage
Link Test Tree to Program	SSR_PROG_TREE_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Link Test Tree to Program, Link Test Tree to Program	Link test trees to academic programs.

Linking the Test Tree to a Program

Access the Link Test Tree to Program page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Link Test Tree to Program, Link Test Tree to Program).

Link Test Tree to Program

Academic Institution:PSNLDPeopleSoft University - NLD

Academic Career:BACBachelor (NLD)

Academic Program:H010H010

Find | View AllFirst1 of 1Last

*Campus:MAINMain Campus

*Academic Load:Full-Time

*Term:2040Acad year 2004-2005

Customize | Find | First1 of 1Last

*Tree Name	*Tree EffDt		Default	
TA TEST	01/01/1900	CAL02.1.3 Sports	☒	

Link Test Tree to Program page

- Campus

Enter the campus for this test tree.
See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Setting Up Campuses.
- Academic Load

Select the academic load for this test tree.
See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Level and Load Rules.

Term	Enter the term for this test tree. Linking the test to a term enables the system to automatically link students to a test tree when they are matriculated. <i>See PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions."</i>
Tree Name	Enter the test tree for this academic program, campus, academic load, and term combination.
Tree EffDt	Enter the effective date of the tree. Test trees can have multiple effective dates to accommodate several versions of the same tests.
Default	Select whether this test tree should be used as the default for this academic program.

Setting up Default VAVO Combination Grade Courses

This section discusses how to:

- Add Combination Grade Course defaults.
- Run the Combination Grade Process.

Pages Used to Set Up Default VAVO Combination Grade Courses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
VAVO Combination Grade Courses	SSR_BR_VAVO_CTBL	Records and Enrollment, Test Administration NLD, Set Up Test Administration, VAVO Combination Grade Courses, VAVO Combination Grade Courses	Add one or more Combination Grade Test defaults per institution, career, term, tree name, and tree effective date.
VAVO Combination Grade Process	SSR_VAVO_COMB_GRD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, VAVO Combination Grade Process, VAVO Combination Grd Process	Run this process to find default Combination Grade Courses set up for institution, career, term, tree and tree effective date and assign these to students linked to this same tree and tree effective date.

Adding Combination Grade Course Defaults

Access the VAVO Combination Grade Courses page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, VAVO Combination Grade Courses, VAVO Combination Grade Courses).

VAVO Combination Grade Courses

Institution PSNLD PeopleSoft University - NLD

Career VAVO Advanced General Educ. (NLD)

Term 2070 Acad year 2007-2008

Required Combination Grades for Tree Find | View All First 1 of 1 Last

***Tree Name** EDU-HAVO-NEWSTYLE

***Tree EffDt** 08/01/2003

	Test ID	Description	HEGIS Code	Education Level
1	00002278	Fa12	400323	

VAVO Combination Grade Courses page

Tree Name Select a validated Test Administration Test Tree value.

Tree EffDt (tree effective date) Select a validated Test Administration Tree effective date.

Test ID Test ID values contain EN test level tests from the values that you select in the Tree Name and Tree EffDt fields.

Running the Combination Grade Process

Access the VAVO Combination Grd Process page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, VAVO Combination Grade Process, VAVO Combination Grd Process).

VAVO Combination Grd Process

Run Control ID: testadmin [Report Manager](#) [Process Monitor](#) **Run**

***As Of Date:** 17-08-2009

VAVO Combination Grd Process page

As Of Date

The system date appears by default each time that you access the page, whether or not a date value already exists in the field. You can enter a different date before you run the process.

Creating Test Lists

Test lists are used for two purposes:

- To enroll students in multiple tests at one time during the enrollment process.
- During the evaluation process.

This section discusses how to:

- Create a tree list.
- Add tests to a test list.

Pages Used to Create Test Lists

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test List Information	SSR_TST_LIST_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Lists, Test List Information	Enter test list information, such as subject area, academic organization, and course ID.
Test List - Tests	SSR_TST_LISTLN_NLD	Records and Enrollment, Test Administration NLD, Test Lists, Tests	Add tests to the list, either individually or by test tree.
Copy Tests	SSR_SEL_COPY_TESTS	Click the Copy Tests button on the Test Lists - Tests page.	Select the test list that you want to copy for this test list.

Creating a Test List

Access the Test List Information page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Test Lists, Test List Information).

Test List Information		Tests	
Test List ID:	00000007		
		Find View All First 1 of 1 Last	
*Effective Date:	02/10/2005	*Status:	Active
*Description:	TA Test List		
Short Description:	TA List		
*Academic Institution:	PSNLD	PeopleSoft University - NLD	
*Academic Career:	BAC	Bachelor (NLD)	
*Subject Area:	AGRIC	Agriculture	
*Academic Organization:	AGRIC	Agriculture	
*Test List Use:	Both		
Course ID:			

Test List Information page

Test List ID

When you create a new test list, this number will be all zeros. When you save the test list, the system assigns the next sequential number from the Next Test ID field on the Installation table.

Test List Use

A test list can be used to enroll students in tests or in the evaluation process. Values are:

Both: Enables this test list to be used during the evaluation process and to enroll students into the tests on the list.

Evaluation: Enables this test list to be used during the evaluation process only.

Place: Enables this test list to be used to enroll students into the tests on the list only.

Course ID

Select a course ID to link this test list to a course.

Adding Tests to a Test List

Access the Test List - Tests page (Records and Enrollment, Test Administration NLD, Test Lists, Tests).

Test List Information

Tests

Test List ID: 00000007

Find | View All

First 1 of 1 Last

Effective Date: 02/10/2005
 Status: Active

Copy Tests

Description: TA Test List

▼ Add Tests by Using Test Tree

Tree Name:

Tree EffDt:

Fetch Data

Customize | Find | View All

First 1-3 of 3 Last

*Sequence	*Test ID	Description		
1	00000003	CAL02.1.3.3 Sports	+	-
2	00000006	CAL02.1.3.2 Sports	+	-
3	00000007	CAL02.1.3.1 Sports	+	-

Test List - Tests page

Copy Tests	Click to add tests by copying the tests in another test list. The Copy Tests page appears, where you can select a test list ID.
Tree Name	Enter a test tree to add tests to the list by tree.
Tree EffDt (tree effective date)	Enter the effective date of the tree that you want to use to add tests to the list. Only valid effective dates for the tree that you select are available.
Fetch Data	Click to populate the grid with the tests and calculated results that make up the test tree.
Sequence	The system increments this number by 1 for each row. Change the order of the rows by changing the sequence number.
Test ID	Enter a test ID to add to this test list. This field is automatically populated when you click the Fetch Data button if you entered a test tree ID and effective date.

Defining Evaluation Rules

Before you can use the Evaluate Students process to determine whether students have passed all of the requirements for a course, a test or calculated result of a test, or for graduation, you must define the evaluation rules, or requisites. The requirements for the evaluation are linked to test trees.

When the system evaluates students, the Evaluate Students SQR process (SREVAENL) uses the evaluation requisites that are defined for a student's academic career, subject, academic organization, and academic program.

This section discusses how to:

- Define evaluation requisites.
- Define evaluation rule details.

Pages Used to Define Evaluation Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Requisites	SSR_REQUISITE_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Requisites, Requisites	Define evaluation requirement by institution, career, program, subject area, academic organization, test tree, and test effective date.
Requisites Lines	SSR_REQUIS_LN_NLD	Records and Enrollment, Test Administration NLD, Set Up Test Administration, Requisites, Requisites Lines	Define the requisite lines for an evaluation requirement.
Copy Requisite Lines	SSR_SEL_COPY_REQ	Click the Copy Requisite Lines button on the Requisite Lines page.	Select a requisite ID from which to copy lines into this requisite.

Defining Evaluation Requisites

Access the Requisites page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Requisites, Requisites).

Requisites		Requisites Lines	
Requisite ID: 00000001			
		Find View All First 1 of 1 Last	
*Effective Date:	08/01/2004	*Status:	Active
*Description:	Atheneum N&T		
*Academic Institution:	PSNLD	PeopleSoft University - NLD	
*Academic Career:	VAVO	Advanced General Educ. (NLD)	
Academic Program:	R004	Atheneum N&T	
*Subject Area:	EDU	Education	
*Academic Organization:	EDUCATN	Education	
Release Restriction:	Release		
Evaluation Type:	End		
Tree Name:	PROGRAM HAVO		
Tree EffDt:	08/01/2004		

Requisites page

Academic Program

Enter the academic program to which this requirement applies.

Release Restriction

Indicate whether the grades that are used to satisfy this requisite and that are also restricted can be used in other requisites. Values are:

Keep: Grades used in this requisite that are restricted cannot be used in other requisites.

Release: Restrictions from this requisite will be released, so grades used in this requisite can also be used in other requisites.

Evaluation Type

Select the evaluation type of this requisite. Values are:

End: The requisite applies to an end of term evaluation.

In Between: The requisite applies to evaluation milestones during the term.

This field is informational only and is not used in any processing.

Tree Name

Enter the test tree for this requisite. Students who are linked to this test tree will be evaluated based on the requisites defined here when you run the Evaluate Students process.

Tree EffDt (tree effective date) Enter the effective date of the test tree for which you are defining evaluation requisites.

Defining Evaluation Rule Details

Access the Requisites Lines page (Records and Enrollment, Test Administration NLD, Set Up Test Administration, Requisites, Requisites Lines).

Requisites **Requisites Lines**

Requisite ID: 00000001

Effective Date: 08/01/2004 Status: Active

Description: Atheneum N&T [Copy Requisite Lines](#)

Customize | Find | View All | First 1 of 9 Last

Requisite Lines Details Comments

Seq Nbr	Operators	(	Not	Type	*Item ID	Show Tests	Description	Operators	Value	+	-
10				Test List	00000003	☒	All courses Atheneum N&T	<=	3.00	+	-
20	AND			Test List	00000003	☒	All courses Atheneum N&T	<=	4.00	+	-
30	AND			Test List	00000003	☒	All courses Atheneum N&T	<=	5.00	+	-
40	AND			Test List	00000004	☒	Profile courses Ath N&T	<=	5.00	+	-
100	AND			Calc Res	00000032	☒	End Dutch			+	-
110	AND			Test List	00000005	☒	Foreign Language 1			+	-
300	AND			Calc Res	00000079	☒	End Mathematics B1,2			+	-
310	AND			Calc Res	00000064	☒	End Science 1,2			+	-
320	AND			Calc Res	00000053	☒	End Chemistry			+	-

Requisites Lines page

Copy Requisite Lines

Click to select an already-created requisite to copy. The Copy Requisite Lines page appears.

Requisite Lines Tab

Seq Nbr (sequence number)

The system increments the sequence numbers by 10 for each line added. The Evaluate Students process evaluates the lines in this requisite in the order established by the sequence numbers. To change the order of the lines, change the sequence numbers.

Operators

If needed, select a Boolean operator to group requirements. The options are *AND*, *AND NOT*, *OR*, and *OR NOT*.

((open parenthesis)

Use parentheses to group requirements. You can use up to three levels.

Not	Select if this line must <i>not</i> be true.
Type	Indicate whether this requisite line pertains to a <i>Calc Res</i> (calculated result), <i>Req</i> (requisite), <i>Test</i> , or <i>Test List</i> . You can create a line that pertains to another requisite because you can have nested requirements.
Item ID	Enter a calculated result, test ID, requisite ID, or test list ID, depending on what you selected in the Type field.
Description	The description of the calculated result, test, requisite, or test list.
Operators	Operators enable the system to evaluate grades on a minimum or maximum condition to determine insufficient grades. For test lists, values are < (less than), <= (less than or equal to), = (equal to), >= (greater than or equal to), and > (greater than). For calculated results, requisites, and tests, values are > (greater than), = (equal to), and >= (greater than or equal to).
Value	Enter the minimum or maximum value of a grade.

Details Tab

Access the Requisites Lines page: Details tab.

Requisites
Requisites Lines

Requisite ID: 00000001

Effective Date: 08/01/2004
Status: Active

Description: Atheneum N&T
Copy Requisite Lines

Requisite Lines
Details
Comments

Seq Hbr	Operators	{	Not	Type	*Item ID	Function	Minimum Value	Maximum Value	Restrict			
10			☐	Test List	00000003	In List						+ -
20	AND		☐	Test List	00000003	In List		1.00				+ -
30	AND		☐	Test List	00000003	In List		2.00				+ -
40	AND		☐	Test List	00000004	In List		1.00				+ -
100	AND		☐	Calc Res	00000032							+ -
110	AND		☐	Test List	00000005	In List	1.00	2.00				+ -
300	AND		☐	Calc Res	00000079							+ -
310	AND		☐	Calc Res	00000064							+ -
320	AND		☐	Calc Res	00000053							+ -

Requisites Lines page: Details tab

Function

Functions are used with test lists, and together with the minimum and maximum values enable you to link conditions to a group of courses, tests, or calculated results such as a minimum or maximum number of tests that a student must pass, or a minimum or maximum number with a specific calculated result.

Values are:

Average: The average of the tests or courses in the list

List: The number of tests or courses that must be in the list.

Sum 1: The sum of Units 1.

Sum 2: The sum of Units 2.

Minimum Value

Enter the minimum number for the selected function.

Maximum Value

Enter the maximum number for the selected function.

Restrict

Designate whether the grades that are used to satisfy this line can be used to satisfy other lines in other requisites. If the grades can be used to satisfy other lines in this requisite, leave the field blank.

Select *All Result* if the grade used to satisfy this line cannot be used to satisfy other lines. The test or calculated result in this line is blocked for further evaluation within this requisite.

Select *Restricted* if the grade used to satisfy this line cannot be used to satisfy other lines within this requisite, but can be used to satisfy lines in other requisites. The test or calculated result in this line is blocked for further evaluation within the requisite.

)(close parenthesis)

Select to close group of lines.

Comments tab

Access the Comments tab.

Requisites		Requisites Lines						
Requisite ID: 00000001								
Find View All First 1 of 1 Last								
Effective Date: 08/01/2004		Status: Active						
Description: Atheneum N&T		Copy Requisite Lines						
Customize Find View All First 1-9 of 9 Last								
Requisite Lines Details Comments								
Seq Nbr	Operators	(	Not	Type	*Item ID	Comments		
10			☐	Test List	00000003	no grades under 4	+	-
20	AND		☐	Test List	00000003	only 1 grade under 5	+	-
30	AND		☐	Test List	00000003	only 2 grades under 6	+	-
40	AND		☐	Test List	00000004	only 1 profile grade under 6	+	-
100	AND		☐	Calc Res	00000032		+	-
110	AND		☐	Test List	00000005	at least one foreign language1	+	-
300	AND		☐	Calc Res	00000079		+	-
310	AND		☐	Calc Res	00000064		+	-
320	AND		☐	Calc Res	00000053		+	-

Requisites Lines page: Comments tab

Comments

Enter any text that you want to appear on the Student Evaluation page.

Chapter 20

(NLD) Managing Student Higher Education Information

This chapter discusses how to track student higher education information.

Tracking Student Higher Education Information

Institutions of higher education must supply information about enrollments and academic progress to Base Register Education (*Basis Register Onderwijs* or BRON). Use the Academic Prog Higher Education page and the Administer Student Higher Education page to register student data that are related to a program and academic year and are required by governmental regulations. You enter the data during the admissions process and during the students' enrollment for a program. You also enter higher education data when using Central Bureau for Admissions and Registration (*Centraal Bureau voor Aanmelding en Plaatsing* or CBAP). Some information is populated automatically during the admissions process and by the matriculation process. Some data—such as form of study and funding applies—are part of the data exchange for BRON.

Pages Used to Manage Student Higher Education Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Prog Higher Education	SSR_STD_PRG_NLD	Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD, Academic Prog Higher Education	Enter academic program for higher education information for a student.
Administer Student Higher Education	SSR_STUDENT_NLD	Records and Enrollment, Higher Education NLD, Student Higher Education NLD, Administer Student Higher Education	Enter higher education information for a student.
Higher Education Inquiry	SSR_HE_PRG_ENQ_NLD	Records and Enrollment, Higher Education NLD, Higher Education Inquiry NLD, Higher Education Inquiry	View higher education information for a student.

Entering Academic Program Higher Education Information for a Student

Access the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD, Academic Prog Higher Education).

Academic Prog Higher Education

NICOLAAS GELDER

SRN013

Academic Career:

Bachelor (NLD)

Student Career Nbr:

0

Program Short Descr

H010

Career Req. Term

Higher Education Information

Find | View All

First 1 of 1 Last

Progr Status Higher Education:

Enrollment

Action Date

09/28/2004

*Effective Date:

09/03/2004

Effective Sequence:

1

*Progr Action Higher Education:

ENRL

Enrollment

Form of Study Higher Education

Student

Acad Level Higher Education

Bachelor

☒ Funding Applies

☒ Program Units Apply

*Academic Year

2004

Form of Payment

Form of Payment

Academic Prog Higher Education page

Effective Sequence	Enter the sequence number for this effective-dated row.
Progr Action Higher Education (program action higher education)	The program action for higher education appears by default from the Application table during the matriculation process. A change to the program action higher education adds a new row with a new effective date or effective sequence.
Form of Study Higher Education	Enter the student's form of study. Options are Auditor, Coop/Dual, Extraneous, Participant, and Student.
Acad Level Higher Education (academic level higher education)	Enter the student's academic level.
Funding Applies	Select this check box if funding rules apply to this student. This is part of the data set for BRON.

Program Units Apply	Select this check box if program unit rules apply to this student. This is part of the data set for BRON.
Academic Year	Enter the academic year for which this information applies.
Form of Payment	Select the form of the payment, such as cash, check, or loan. This field becomes available when the Progr Action Higher Education field is <i>PAYM</i> .
Authorized for Payment	If students have authorized a third-party, such as a parent or guardian, to make their tuition payment for them, enter that person's name here.

Managing Student Higher Information

Access the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD, Administer Student Higher Education).

Administer Student Higher Education

NICOLAAS GELDER
SRN013

Student details
Find | View All
First 1 of 1 Last

First Year Higher Education: 2002
GBA Status: Departmental decision

First Year Financial Aid: 2002
GBA Year of Birth: 1984

Regime: P
GBA Month of Birth: 09

Student BRINcode
Find | View All
First 1 of 1 Last

*BRINcode: NL01
NLD Brincode 01

First Year at Brincode: 2002

First Year Funded: 2002

Progress academic year
Find | View All
First 1 of 1 Last

*Academic Year: 2004

Individual Norm Units: 12

Total Number of Units: 12

☒ Study Progress

[Add/Update Person](#)

Administer Student Higher Education page

Student Details

First Year Higher Education Enter the year a student was enrolled for the first time for higher education in The Netherlands regardless of the institution.

First Year Financial Aid	Enter the first year the student began receiving financial aid.
Regime	Enter the regulation that applies to this student. Your options are <i>T</i> (Tempo Scholarship) or <i>P</i> (Performance Scholarship).
GBA Status (<i>Gemeentelijke Basis Administratie status</i>)	Enter the student's current GBA status.
GBA Year of Birth	Enter the student's year of birth according to GBA.
GBA Month of Birth	Enter the student's month of birth according to GBA.

Student BRINcode

BRINcode	Enter a BRINcode for the student.
First Year of BRINcode	Enter the first year that this BRINcode applied to the student.
First Year Funded	Enter the first year that the student received funding.

Progress Academic Year

Update this section every year to reflect the student's progress. Add a row for each academic career.

Academic Year	Enter the current academic year.
Individual Norm Units	Enter the units a student has earned for a certain program in a specified academic year.
Total Number of Units	Enter the student's total number of registered units for this academic year.
Study Progress	Select this check box if these units are currently in progress.
Add/Update Person	Click this link to access this student's personal data. See <i>PeopleSoft Campus Community 9.0 Fundamentals PeopleBook</i> , "Adding a Person to Your Campus Solutions Database."

Viewing Higher Education Information for a Student

Access the Higher Education Inquiry page (Records and Enrollment, Higher Education NLD, Higher Education Inquiry NLD, Higher Education Inquiry).

Higher Education Inquiry

ID: SRN025

KRANTZ,JESSICA L

Career: Bachelor (NLD)

Student Career Nbr: 0

Institution: PSNLD

Program: H011

Effective Date: 09/28/2004

Admit Term

Academic Program:

Academic Organization:

Campus:

BRINcode:

Academic Level:

Form of Study:

☐ Funding Applies

Academic Year

Enrollment Data

Find | View All

First 1 of 1 Last

Effective Date:

Form of Study:

☐ Funding Applies

Prog Action HE:

Academic Level:

☐ Program Units Apply

Higher Education Inquiry page (1 of 2)

Payment Data

Find | View All

First 1 of 1 Last

Effective Date:

Form of Payment:

Auth. to Pay:

Exam Results

Find | View All

First 1 of 1 Last

Effective Date:

Academic Level:

☐ Funding Applies

Progress academic year

Find | View All

First 1 of 1 Last

Academic Year:

Total Number of Units: 0

☐ Study Progress

Higher Education Inquiry page (2 of 2)

Academic Year

Enter an academic year to populate data for that year.

Chapter 21

(NLD) Managing Test Administration

This chapter lists common elements and discusses how to:

- Create test sessions.
- Maintain test sessions.
- Maintain test sessions by session.
- Maintain test sessions by student.
- Link test trees to students.
- Maintain VAVO Course Options.
- Calculate grades and evaluate students.
- View and adjust evaluation results.
- Report evaluation data.
- Load and view grade data in test trees.

Common Elements Used in This Chapter

Academic Career

Enter the appropriate academic career.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Careers.

Academic Institution

Enter the appropriate academic institution.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Institutions.

Campus

Enter the appropriate campus.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Setting Up Campuses.

Session	Select the type of academic session. <i>See PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions," Defining Sessions.</i>
Term	Enter the appropriate term. <i>See PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions," Defining Terms.</i>

Creating Test Sessions

With the Test Administration functionality, create the test sessions and enroll students in the tests with the same process. Create a test session with a test date, start time and end time, session, section, exam session, facility, and instructor.

This section discusses how to:

- Select test session criteria.
- Insert test sessions and students.

Pages Used to Create Test Sessions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Test Sessions - Selection	SSR_CRE_TST_NLD	Records and Enrollment, Test Administration NLD, Create Test Sessions, Selection	Define the test session and select the method for enrolling students.
Insert Test Sessions/Students	SSR_CRE_TST1_NLD	Records and Enrollment, Test Administration NLD, Create Test Sessions, Insert Test Sessions/Students	Enter tests and calculated results in the test session and select the students for enrollment.

Selecting Test Session Criteria

Access the Create Test Sessions - Selection page (Records and Enrollment, Test Administration NLD, Create Test Sessions, Selection).

Selection		Insert Test Sessions/Students																						
Run Control ID: TATEST		Report Manager Process Monitor Run																						
*Academic Institution:	PSNLD PeopleSoft University - NLD	☒ Report Only ☐ Process Grade Attributes ☐ Process Repeats Minimum Value Maximum Repeats 1																						
*Academic Career:	BAC Bachelor (NLD)																							
*Term:	2040 Acad year 2004-2005																							
*Session:	Regular Academic Session																							
Curr Effdt:	02/10/2005																							
Basis:	Student Enrollment Blocks																							
Course ID:																								
<table border="1"> <thead> <tr> <th colspan="2">Enrollment Basis</th> <th>Customize</th> <th>Find</th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> <tr> <th>Block</th> <th>Description</th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1 BAC</td> <td>Student BAC block</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Enrollment Basis		Customize	Find	First	1 of 1	Last	Block	Description						1 BAC	Student BAC block					
Enrollment Basis		Customize	Find	First	1 of 1	Last																		
Block	Description																							
1 BAC	Student BAC block																							

Create Test Sessions - Selection page

The Create Test Session SQR process (SRCRESNL) creates the test sessions and enrolls the students based on the criteria that you select on the Create Test Sessions - Selection and Insert Test Sessions/Student pages.

Basis

Select how the system will enroll students. Values are:

Enrollment in Classes: Select to enroll students who are enrolled in the selected classes into the test sessions.

Student Enrollment Blocks: Select to enroll students into test sessions from an enrollment block.

Student Groups: Select to enroll students into test sessions from a student group.

Course ID

Enter a course ID to select classes by course.

This field is available only when you select *Enrollment in Classes* in the Basis field.

Report Only

Select to do a test run to determine whether the enrollment will be successful. You will be able to view and correct any errors that occur with the criteria that you defined before processing the actual enrollment.

Process Grade Attributes

Select to process students that have an exempt grade for the test.

Process Repeats

Select to process repeated sessions.

Minimum Value

Enter the minimum grade value that is allowed for repeats.

Maximum Repeats

Enter the maximum number of repeats that are allowed.

Enrollment Basis

Block

Enter the enrollment block from which to enroll students. You can insert as many rows as needed.

This field is available only when you select *Student Enrollment Blocks* in the Basis field.

Class

Enter the class from which you want to enroll students. You can insert as many rows as needed.

This field is available only when you select *Enrollment in Classes* in the Basis field.

Group

Enter the student group from which you want to enroll students. You can insert as many rows as needed.

This field is available only when you select *Student Groups* in the Basis field.

Inserting Test Sessions and Students

Access the Insert Test Sessions/Students page (Records and Enrollment, Test Administration NLD, Create Test Sessions, Insert Test Sessions/Students).

Selection

Insert Test Sessions/Students

Run Control ID: Test
[Report Manager](#)
[Process Monitor](#)
[Run](#)

☐ Select All

Test Lists
[Find](#) | [View All](#)
First 1 of 1 Last

Test List ID
00000008 [Test List BAC](#)

Process Default Values

Test Date: 01/31/2005
Examination Session: Central Examination

☒ Keep Group Codes
[Insert sessions](#)
[Insert Students](#)

Enrollment Data
Details

	Select	Enroll	Details	Test ID	Description	*Test Date	Section	Test section1	Examination Session		
1	☒	☒	Details	00000003	CAL02.1.3.3 Sports	01/31/2005	BAC	BAC	CE1	+	-
2	☒	☒	Details	00000006	CAL02.1.3.2 Sports	01/31/2005	BAC	BAC	CE1	+	-
3	☒	☒	Details	00000007	CAL02.1.3.1 Sports	01/31/2005	BAC	BAC	CE1	+	-
4	☒	☒	Details	00000014	Culture and Socialization 2	01/31/2005	BAC	BAC	CE1	+	-

Insert Test Sessions/Students page

Select All	Select to choose from all test lists that are created for the academic institution and career combination. If this check box is cleared, you can choose only from the test lists that are associated with the course ID entered on the Selection page. This check box is available only if you selected <i>Enrollment in Classes</i> as the enrollment basis on the Selection page.
Test List ID	Enter a test list to generate test sessions for the tests in the list. You can add more than one test list. You can enroll students into test lists if you selected <i>Place</i> or <i>Both</i> in the Test List Use field on the Test List Information page.
Keep Group Codes	Select to create test sessions for each test in the test list for every class, group, or block that you entered on the Create Test Sessions - Selection page. For example, if you entered two classes and the test list contains four tests, selecting this check box would generate eight test sessions. If you clear this check box, the system creates one test session for each test in the test list and calls the session <i>TOT</i>.
Insert Session	Click to insert test sessions from the test list that you selected.
Insert Students	Click to enroll students from the basis on the Selection page.
Test ID	Enter a test or calculated result ID.
Test Date	Enter a default test date for the test sessions.
Examination Session	Select a default examination session for the test sessions that you create. The values are <i>Central Examination 1</i>, <i>Central Examination 2</i>, <i>End Examination 1</i>, <i>End Examination 2</i>, and <i>School Examination</i>.
<i>Enrollment Data</i>	
Select the Enrollment Data tab.	
Select	Select to include this row in the Create Test Sessions process.
Enroll	Select to have the Create Test Sessions process enroll students from this row.
Details	Click to view, add, or delete students from the session, and to view messages about the students' enrollment in the session. The Enroll Student in Tests page appears.
Test ID	When you click the Insert Tests button, the system loads the tests from the test list and supplies the test ID. You can add or delete tests by adding or deleting rows.
Description	The description of the test appears.

Test Date	The test date that is entered in the Process Default Values group box appears. You can change this date here.
Section	This comes from the selection page and is based on the selection in the Enrollment Basis grid.
Test Section1	If the Keep Group Codes check box is selected, the system populates this field with the description of the enrollment basis. If the Keep Group Codes check box is cleared, the system names the section <i>TOT</i> ; however, you can change it. This value will appear in the Test Session pages.
Examination Session	The examination session that is entered in the Process Default Values group box appears. You can change the session if needed. The values are <i>CE1</i> , <i>CE2</i> , <i>EN1</i> , <i>EN2</i> , and <i>SCE</i> .

Details

Select the Details tab.

Customize Find View All First 1-3 of 3 Last											
Enrollment Data		Details									
	Select	Enroll	Details	Test ID	Description	Instructor ID	Facility ID	Meeting Start Time	Meeting End Time		
1	☒	☒	Details	00000003	CAL02.1.3.3 Sports					+	-
2	☒	☒	Details	00000006	CAL02.1.3.2 Sports					+	-
3	☒	☒	Details	00000007	CAL02.1.3.1 Sports					+	-

Insert Test Sessions/Student page: Details tab

Instructor ID	Enter an instructor for the test session.
Facility ID	Enter a facility for the test session.
Meeting Start Time	Enter the time that the meeting is planned to start.
Meeting End Time	Enter the time that the meeting is planned to end.

Maintaining Test Sessions

When you run the Create Test Session process, the system populates the Test Session table. Use the pages in the Test Session component to make any necessary changes to the test sessions details, enroll additional students, and enter grades and comments.

You can also manually create test sessions using the pages in the Test Session component.

This section discusses how to:

- Maintain test session details.
- Enroll additional students.
- Enter grades.
- Enter grade comments.

Pages Used to Maintain Test Sessions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Session	SSR_TST_SES1_NLD	Records and Enrollment, Test Administration NLD, Test Sessions, Test Session	View test sessions, or create new sessions. To create a session, select a test ID from the search dialogue page.
Test Sessions - Enroll Students	SSR_TST_SES2_NLD	Records and Enrollment, Test Administration NLD, Test Sessions, Enroll Students	Add students to the test session.
Test Sessions - Grades	SSR_TST_SES3_NLD	Records and Enrollment, Test Administration NLD, Test Sessions, Grades	Enter student grade details.
Test Sessions - Comments	SSR_TST_SES4_NLD	Records and Enrollment, Test Administration NLD, Test Sessions, Comments	Enter comments about the student grades.

Maintaining Test Session Details

Access the Test Session page (Records and Enrollment, Test Administration NLD, Test Sessions, Test Session).

Test Session	Enroll Students	Grades	Comments
Test ID:	00000001 Social Cultural Education		
Academic Institution:	PeopleSoft University - NLD		
Academic Career:	Bachelor (NLD)		
Term:	Acad year 2004-2005		
Find View All First 1 of 1 Last			
*Session:	Regular Academic Session		
*Test Section:	01222		
*Test Date:	02/22/2005		
Examination Session:	Central Examination 1		
Meeting Start Time:	9:30AM		
Meeting End Time:	11:30AM		
Facility ID:			
Instructor ID:	SR14031		

Test Session page

Test Section	Enter the test section code. This field is alphanumeric and can be up to 5 characters long.
Test Date	Enter the date of the test session.
Examination Session	Select the examination type.
Meeting Start Time and Meeting End Time	Enter the start and end times for the test session.
Facility ID	Enter a facility ID. Facility IDs are defined on the Facility Table page. See Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Buildings, Rooms, and Classroom Facilities, page 29.
Instructor ID	Enter the ID for the instructor who will be facilitating the test session.

Enrolling Additional Students

Access the Test Sessions - Enroll Students page (Records and Enrollment, Test Administration NLD, Test Sessions, Enroll Students).

Test Session	Enroll Students	Grades	Comments
Test ID: 00000001 Social Cultural Education Academic Institution: PeopleSoft University - NLD Academic Career: Bachelor (NLD) Term: Acad year 2004-2005			
Find View All First 1 of 2 Last			
Session: Regular Test Section: 0122 Test Date: 05/10/2005			
▼ Add Students			
Basis: Student Enrollment Blocks Block: BAC Add Students			
Customize Find View All First 1-3 of 3 Last			
ID	Name	Grading Basis	Academic Career
1 SRN013	GELDER,NICOLAAS J	GRD	BAC
2 SRN023	AMSTERDAM,DANIEL J	GRD	BAC
3 SRN033	MEGGELEN,ADRIANA N	GRD	BAC

Test Sessions - Enroll Students page

Basis Select how to enroll students. Values are *Enrollment in Classes*, *Student Enrollment Blocks*, and *Student Groups*.

Class,Block, or Group Enter the enrollment block, class, or student group from which to enroll students for this session.

The name of this field depends on the selection in the Basis field.

Add Students Click to add students to the test section.

ID Enter the ID of a student to enroll in the test session.

Grading Basis Enter the grading basis for this student.

Entering Grades

Access the Test Sessions - Grades page (Records and Enrollment, Test Administration NLD, Test Sessions, Grades).

Test Session		Enroll Students		Grades		Comments		
Test ID:	00000001 Social Cultural Education							
Academic Institution:	PeopleSoft University - NLD							
Academic Career:	Bachelor (NLD)							
Term:	Acad year 2004-2005							
Find View All First 1 of 2 Last								
Session:	Regular		Test Section:	0122		Test Date:	05/10/2005	
Customize Find View All First 1-3 of 3 Last								
Enrollment Data		Details						
ID	Name	Present	Grade Date	Grading Basis	Official Grade	Grade Attribute	No Calculation	
1 SRN013	GELDER,NICOLAAS J	☒	02/10/20	GRD	9.9			
2 SRN023	AMSTERDAM,DANIEL J	☒	02/10/20	GRD	1.1			
3 SRN033	MEGGELEN,ADRIANA N	☒	02/10/20	GRD	7.3			

Test Sessions - Grades page

Present

The system automatically selects this check box.

Official Grade

Enter the grade for the student.

Grade values are defined for each grading basis on the Grading Scheme table.

See [Chapter 12, "Setting Up Grading," page 287](#).

Grade Attribute

Select a grade attribute. Values are:

Diff Qual (different qualification): This grade is received from another institution.

Ex Calc (exclude from calculation): This is an exemption without a grade. This grade will not be used in the calculation process.

Exemption: This grade is based on an exemption.

Ex Com Grd (exemption combination grade): Exemption with a specific distinction of Combination Grade. It is managed the same as a grade with an attribute type of *Exemption*.

No Calculation

Enter a reason that the grade will not be used in the calculation process. Values are:

- *No Qual* (no qualification or diploma).
- *Not Rel* (not relevant).
- *Ref Term* (reference to other term).
- *Withdrawn*.

Entering Grade Details

Access the Test Sessions - Grades page: Details tab.

Customize Find View All First 1-3 of 3 Last							
Enrollment Data		Details					
ID	Name	Test Score	Units 1	Units 2	Valid Through	School Type	
1 SRN013	GELDER,NICOLAAS J	9.00	3.00	2.00	05/10/2015	Night	
2 SRN023	AMSTERDAM,DANIEL J	1.00			05/10/2015	Day	
3 SRN033	MEGGELEN,ADRIANA N	7.00	3.00	2.00	05/10/2015	Day	

Test Sessions - Grades page: Details tab

Test Score	Enter the score that the student received for the test.
Units 1 and Units 2	If the grade is sufficient for the student to earn credit, the system populates this field with the credit value that is entered in the course catalog.
Valid Through	If the grade is valid for only a limited amount of time, the system populates this field with the appropriate date based on what is entered in the Grade Valid and Years Valid fields in the test catalog.
School Type	Select whether the school is <i>Day</i> or <i>Night</i> .

Entering Grade Comments

Access the Test Sessions - Comments page (Records and Enrollment, Test Administration NLD, Test Sessions, Comments).

Test Session	Enroll Students	Grades	Comments			
Test ID: 00000001 Social Cultural Education Academic Institution: PeopleSoft University - NLD Academic Career: Bachelor (NLD) Term: Acad year 2004-2005						
Find View All First 1 of 2 Last						
Session: Regular Test Section: 0122 Test Date: 05/10/2005						
Customize Find View All First 1-3 of 3 Last						
ID	Name	Consolidated	Complete	Frozen	Comments	Additional Comments
1 SRN013	GELDER,NICOLAAS J	☐	☒	☐		
2 SRN023	AMSTERDAM,DANIEL J	☐	☒	☐		
3 SRN033	MEGGELEN,ADRIANA N	☐	☒	☐		

Test Sessions - Comments page

Consolidated

This is selected if the student has completed the program. All grades that are linked to the program through the linked test tree are set to consolidated and you cannot delete or change anything on these grade records.

Complete

This is automatically selected when a grade is entered, when a calculated result is manually entered with a grade attribute, and when a calculated result that satisfies all the requisites is entered by the calculation process. If a grade for a calculated result is entered without an attribute or if a calculated result that does not meet all of the requisites is entered by the calculation process, the check box is cleared.

Frozen

Select this check box if you do not want the calculated result to be removed during the calculation process.

Comments and Additional Comments

Free form text fields exist that can print on Crystal reports used by your institution.

Maintaining Test Sessions by Session

The pages in the Maintain Test Session per Sessions component (SSR_TST_PSES_NLD) are the same as in the Test Session component (SSR_TST_SES_NLD) except that the Maintain Test Session per Session component does not have the Session page.

This section discusses how to:

- Enroll students by test session.
- Enter grades.
- Enter comments.

Pages Used to Maintain Test Sessions by Session

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Session per Session - Enroll Students	SSR_TST_PSES2_NLD	Records and Enrollment, Test Administration NLD, Test Sessions per Session, Enroll Students	Enroll additional students in the test session.
Test Session per Session - Grades	SSR_TST_PSES3_NLD	Records and Enrollment, Test Administration NLD, Test Sessions per Session, Grades	Enter grade details for each student.
Test Session per Session - Comments	SSR_TST_PSES4_NLD	Records and Enrollment, Test Administration NLD, Test Sessions per Session, Comments	Enter additional grade details and comments for each student.

Enrolling Students by Test Session

Access the Test Sessions per Session - Enroll Students page (Records and Enrollment, Test Administration NLD, Test Sessions per Session, Enroll Students).

The fields on this page are the same as those on the Test Sessions - Enroll Students page.

See [Chapter 21, "\(NLD\) Managing Test Administration," Enrolling Additional Students, page 506.](#)

Entering Grades

Access the Test Sessions per Session - Grades page (Records and Enrollment, Test Administration NLD, Test Sessions per Session, Grades).

The fields on this page are the same as those on the Test Sessions - Grades page.

See [Chapter 21, "\(NLD\) Managing Test Administration," Enrolling Additional Students, page 506.](#)

Entering Comments

Access the Test Sessions per Session - Comments page.

The fields on this page are the same as those on the Test Sessions - Comments page (Records and Enrollment, Test Administration NLD, Test Sessions per Session, Comments).

See [Chapter 21, "\(NLD\) Managing Test Administration," Entering Grade Comments, page 509.](#)

Maintaining Test Sessions by Student

Grades for test sessions can also be entered and viewed by student.

This section discusses how to:

- Maintain test sessions by student.
- Maintain session grades per student.

Pages Used to Maintain Test Sessions by Student

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Sessions per Student	SSR_ST_SES_ADD_NLD	Records and Enrollment, Test Administration NLD, Test Sessions Per Student, Test Sessions per Student	Add test session or enter test session grades for a student.
Student Grades - Test Session	SSR_STD_GRD1_NLD	Records and Enrollment, Test Administration NLD, Student Grades, Test Session	View session enrollment information for a student.
Student Grades - Grade	SSR_STD_GRD2_NLD	Records and Enrollment, Test Administration NLD, Student Grades, Grade	View, add, alter, or delete grades per student.
Student Grades - Comments	SSR_STD_GRD3_NLD	Records and Enrollment, Test Administration NLD, Student Grades, Comments	View, add, alter, or delete grade comments per student.

Maintaining Test Sessions by Student

Access the Test Sessions per Student page (Records and Enrollment, Test Administration NLD, Test Sessions Per Student, Test Sessions per Student).

Test Sessions per Student

ID: SRN015 ERIC HELMUS
Academic Institution: PeopleSoft University - NLD
Academic Career: Bachelor (NLD)
Term: Acad year 2004-2005

▼ Add Test Sessions

Test ID: 00000001 Social Cultural Education **Test Date:** 05/10/2005 **Search**
Session: Regular Academic Session **Test Section:** 01222
Examination Session **Add Test Sessions**

[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Test ID	Description	Present	Grade Base	Grade	Grade Attribute	No Calculation	Grade Date	
00000001	Social Cultural Education	☒	GRD				02/10/2005	

Test Sessions per Student page

- Test ID** Enter the test ID in which to enroll the student.
- Examination Session** Select an exam session.
- Test Date** Enter a test date.
- Test Section** Enter a test section.
- Search** Click to search for valid test sessions based on any combination of criteria entered in the Add Test Session group box. The Search Test Session page appears.
- Add Test Sessions** Click to add the selected test session to the student's list.

Enrollment Data Tab

Access the Test Sessions per Student page - Enrollment Data tab.

The fields on the Enrollment Data tab are the same as those on the Test Sessions - Grades page: Enrollment Data tab.

See [Chapter 21, "\(NLD\) Managing Test Administration," Entering Grades, page 507.](#)

Details Tab

Access the Test Sessions per Student page: Details tab.

The fields on the Details tab are the same as those on the Test Sessions - Grades page: Details tab and the Test Sessions - Comments page.

See [Chapter 21, "\(NLD\) Managing Test Administration," Entering Grades, page 507.](#)

See [Chapter 21, "\(NLD\) Managing Test Administration," Entering Grade Comments, page 509.](#)

Maintaining Session Grades per Student

The pages in the Student Grades component (SSR_STD_GRD_NLD) are similar to the pages that are used to enter grades and comments in the Test Session component (SSR_TST_SES_NLD). The Student Grades component does not have the Enroll Student page, and the fields on the Test Session page are view only.

Linking Test Trees to Students

When an applicant is matriculated, the test trees that are linked to the program are assigned to the student. After a student has been matriculated, you can link additional test trees to the student.

See Also

[Chapter 19, "\(NLD\) Setting Up Test Administration," Creating Test Trees in Tree Manager, page 476](#)

Page Used to Link Test Trees to Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Test Tree	SSR_STPRG_TREE_NLD	Records and Enrollment, Test Administration NLD, Student Test Tree, Student Test Tree	Link test trees to students.

Linking Test Trees to Students

Access the Student Test Tree page (Records and Enrollment, Test Administration NLD, Student Test Tree, Student Test Tree).

Student Test Tree

ERIC HELMUS
SRN015

Academic Institution: PSNLD PeopleSoft University - NLD
Academic Career: BAC Bachelor (NLD)
Academic Program: H010 H010
Campus: MAIN Main Campus
Academic Load: Full-Time

Find | View All First 1 of 1 Last

***Effective Date:** 09/01/2003
***Status:** Active

*Tree Name	*Tree EffDt	Description		
TEST	01/01/1900	CAL02.1.3 Sports		

Student Test Tree page

Tree Name Select the tree ID to which the student will be linked.

Tree EffDt (tree effective date) Enter the effective date of the tree.

Maintaining VAVO Course Options

Use the VAVO Course Per Student (SSR_TSTVAVO_NLD) component to specify whether VAVO courses are combination grades or taken at a higher level.

Combination grades are set up as a calculated result for which all possible underlying combination grades have been allocated. However, student exceptions can occur. Use the Student VAVO Course Details page to indicate which courses are part of the overall combination grade calculation for a particular student.

Administrators can also assign higher level course substitutions on this page. Higher level course substitutions offer students the possibility to achieve higher-level course results for specified courses, allowing these students to excel in particular course subjects.

Page Used to Maintain VAVO Course Options

Page Name	Definition Name	Navigation	Usage
Student VAVO Course Details	SSR_TSTVAVO_NLD	Records and Enrollment, Test Administration NLD, VAVO Course per Student, Student VAVO Course Details	Enter combination grade courses and/or substitution higher level courses.

Maintaining VAVO Course Options

Access the Student VAVO Course Details page (Records and Enrollment, Test Administration NLD, VAVO Course per Student, Student VAVO Course Details).

Student VAVO Course Details

Higher Level Course substitution and indication for combination grades

Bert Wiegel SSRNL00005

Academic Institution: PSNLD PeopleSoft University - NLD

Academic Career: VAVO

Career Nbr: 0

Academic Program: R007 VAVO ATH NW no profile

Campus: MAIN Main Campus

Academic Load: Full-Time

Term: 2070

Customize | Find | First 1-7 of 7 Last

Combination Grade or Replaced TST ID Enter Higher Level Substitution Courses here

	Test ID	HEGIS Code	Education Level	Description	Combination Grade		
1	00002150	430071	VWO	Engelse taal	☒	+	-
2	00002152	430052	VWO	French Lang 1,2	☒	+	-
3	00002171	430051	VWO	French Lang 1	☒	+	-
4	00002278	400323			☒	+	-
5	00002283	420260	HA	Music	☒	+	-
6	00002284	400341	HA	Science 1	☒	+	-
7	00002287	420181	HA	Chemistry	☒	+	-

Student VAVO Course Details page: Combination Grade or Replaced TST ID tab

Test ID

Select a test ID for which you want to add a combination grade indication or a higher level substitution course.

Combination Grade

Select to indicate that the test ID should count towards an overall combination grade calculated result. If you select this check box, the Calculation process uses the combination grade test result and counts it towards the overall combination grade calculated result set up through the Test Catalog.

Education Level

Displays the course education level. Education level is set up for each HEGIS Code that is related to a course (Set up SACR , Foundation Tables, Reporting Codes, HEGIS Code Table).

Select the Enter Higher Level Substitution Courses here tab.

Student VAVO Course Details

Higher Level Course substitution and indication for combination grades

Bert Wiegel SSRNL00005

Academic Institution: PSNLD PeopleSoft University - NLD
Academic Career: VAVO
Career Nbr: 0
Academic Program: R007 VAVO ATH NW no profile
Campus: MAIN Main Campus
Academic Load: Full-Time
Term: 2070

Customize | Find |
First 1-7 of 7 Last

Combination Grade or Replaced TST ID
Enter Higher Level Substitution Courses here

	Test ID Higher Level	HEGIS Code	Education level	Description		
1					+	-
2					+	-
3					+	-
4					+	-
5					+	-
6	00002156	430171	VWO	Science 1	+	-
7					+	-

Student VAVO Course Details page: Enter Higher Level Substitution Courses here tab

Test ID Higher Level

Select a test ID to indicate the substitution course for the combination grade or the replaced test ID. If you select a test ID, the Calculation process uses the grade test result from this test ID and counts it towards the overall calculated result in which this test ID is included. This can be done whether or not the Combination Grade check box is selected for the course.

Calculating Grades and Evaluating Students

After all grades for tests have been entered, the system can calculate the results by student or by program. The calculation process uses a test tree to retrieve test grades, weight values, and attributes.

Evaluations are also run by student or program. Based on information in the Requisite table, the system determines whether the student has passed or not passed. All of the requisites that are linked to the student's assigned test tree are evaluated, and the results per requisite and per requisite line are written to the Results table.

This section provides an overview of the Calculation process and discusses how to:

- Calculate grades per student.
- Calculate grades per program.
- Evaluate results per student.
- Evaluate results per program.

Understanding the Calculation Process

The calculation process:

1. Selects students for whom to calculate grades.
2. Determines whether the student is active in a program.
3. Selects the test tree that is linked to the student and determines whether the tree is valid.
4. Starts the actual calculation process starting with the nodes at the lowest level of the test tree.
5. For each node on the test tree, selects the underlying tests and calculated results.
6. For each node, selects the information from the calculated results with the latest effective date.
7. Determines whether the calculated results already exist for the student. If the calculated result already exists, and *calculate within term only* is not selected, the existing calculated result is deleted.
8. Writes the results to the Results table.

Pages Used to Calculate Cumulative Grades and Evaluate Students

Page Name	Definition Name	Navigation	Usage
Cumulative Grades per Student	SSR_RUNTSTEMPL_NLD	Records and Enrollment, Test Administration NLD, Cumulative Grades per Student, Cumulative Grades per Student	Start the Cumulative Grades per Student SQR process (SRCEMPNL) for specific students.

Page Name	Definition Name	Navigation	Usage
Cumulative Grades per Program	SSR_RUN_CALTST_NLD	Records and Enrollment, Test Administration NLD, Cumulative Grades per Program, Cumulative Grades per Program	Start the Cumulative Grades per Program SQR process (SRCACDNL) for all students in an academic program.
Evaluation per Student	SSR_RUNSTEMPL_NLD	Records and Enrollment, Test Administration NLD, Evaluation per Student, Evaluation per Student	Start the Student Evaluation SQR process (SREVANENL) for specific students.
Evaluation per Program	SSR_RUN_CALTST_NLD	Records and Enrollment, Test Administration NLD, Evaluation per Program, Evaluation per Program	Start the Program Evaluation SQR process (SREVPNL) for all students in an academic program.

Calculating Grades per Student

Access the Cumulative Grades per Student page (Records and Enrollment, Test Administration NLD, Cumulative Grades per Student, Cumulative Grades per Student).

Cumulative Grades per Student

Run Control ID: TATest [Report Manager](#) [Process Monitor](#) Run

***Academic Institution:** PSNLD PeopleSoft University - NLD
***Academic Career:** BAC Bachelor (NLD)
Campus: MAIN Main Campus
***Term:** 2040 Acad year 2004-2005
Session: Regular Academic Session
***Current Effective Date:** 02/10/2005 Delete All Students

▼ Add Students

Basis: Student Enrollment Blocks **Block:** BAC Add Students

Customize Find View All				First	1-3 of 3	Last
ID	Name	Calculate Inactive Student				
1 SRN013	GELDER,NICOLAAS J	☐			+	-
2 SRN023	AMSTERDAM,DANIEL J	☐			+	-
3 SRN033	MEGGELEN,ADRIANA N	☐			+	-

Cumulative Grades per Student page

Basis	Select how the system selects students for the calculation process. The values are <i>Enrollment in Classes</i> , <i>Student Enrollment Blocks</i> , and <i>Student Groups</i> .
Block, Class, and Group	Enter the enrollment block, class, or student group for the system to calculate grades.
Calculate Inactive Student	Select to have the system consider grades for students who are no longer active in the academic career in the calculation process.

Calculating Grades per Program

Access the Cumulative Grades per Program page (Records and Enrollment, Test Administration NLD, Cumulative Grades per Program, Cumulative Grades per Program).

Cumulative Grades per Program

Run Control ID: Test [Report Manager](#) [Process Monitor](#) [Run](#)

*Academic Institution: PSNLD PeopleSoft University - NLD

*Academic Career: BAC Bachelor (NLD)

Campus: MAIN Main Campus

*Term: 2040 Acad year 2004-2005

Session: Regular Academic Session

*Current Effective Date: 01/24/2005

Customize | Find | View All | First 1 of 1 Last

*Academic Program	Description
H010	H010

Cumulative Grades per Program page

Academic Program	Enter the academic program for the system to calculate grades.

Evaluating Results per Student

Access the Evaluation per Student page (Records and Enrollment, Test Administration NLD, Evaluation per Student, Evaluation per Student).

Evaluation per Student

Run Control ID: TATest

[Report Manager](#) [Process Monitor](#) Run

*Academic Institution:

PSNLD

PeopleSoft University - NLD

*Academic Career:

BAC

Bachelor (NLD)

*Term:

2040

Acad year 2004-2005

Delete All Students

▼ Add Students

Basis:

Group:

Add Students

Customize Find View All					First	1-3 of 3	Last
	ID		Name				
1	SRN013		GELDER,NICOLAAS J		+	-	
2	SRN023		AMSTERDAM,DANIEL J		+	-	
3	SRN033		MEGGELEN,ADRIANA N		+	-	

Evaluation per Student page

- Delete All Students

Click to clear all student rows from this page.
- Basis

Select how the system selects students for the evaluation process. The values are *Enrollment in Classes*, *Student Enrollment Blocks*, and *Student Groups*.
- Block, Class, and Group

Enter the enrollment block, class, or student group for the system to run the evaluation process.
- Add Students

Click to have the system list the students from the selected basis on this page.

Evaluating Results per Program

Access the Evaluation per Program page (Records and Enrollment, Test Administration NLD, Evaluation per Program, Evaluation per Program).

Evaluation per Program

Run Control ID: Test [Report Manager](#) [Process Monitor](#) [Run](#)

*Academic Institution: PeopleSoft University - NLD

*Academic Career: Bachelor (NLD)

Campus: Main Campus

Customize | Find | View All | First 1 of 1 Last

*Academic Program	Description		
H010	H010	+	-

Evaluation per Program page

Academic Program Enter the academic program for the system to run the evaluation process.

Viewing and Adjusting Evaluation Results

When the evaluation process is run, the system populates the Adjust Evaluation Results component (SSR_STPRGTR_CR_NLD). Evaluation results can be corrected or changed in this component if necessary.

This section discusses how to:

- View additional details of student evaluation results.
- Approve adjustments.
- Adjust evaluation results.

Pages Used to View and Adjust Evaluation Results

Page Name	Definition Name	Navigation	Usage
Result Determination	SSR_STPRG_APPR_NLD	Records and Enrollment, Test Administration NLD, View Evaluation Results, Result Determination	View student evaluation results.
Details Determination	SSR_STDPRAPTST_NLD	Records and Enrollment, Test Administration NLD, View Evaluation Results, Details Determination	View additional details of student evaluation results.

Page Name	Definition Name	Navigation	Usage
Adjust Approval	SSR_STPRGAPCR_NLD	Records and Enrollment, Test Administration NLD, Adjust Evaluation Results, Adjust Approval	Manually override the outcome of the evaluation process.
Adjust Result	SSR_STDPRAPTCR_NLD	Records and Enrollment, Test Administration NLD, Adjust Evaluation Results, Adjust Result	Indicate whether a correction needs to be made to a requisite line.

Viewing Additional Details of Student Evaluation Results

Access the Details Determination page (Records and Enrollment, Test Administration NLD, View Evaluation Results, Details Determination).

Result Determination | **Details Determination**

Bert Wiegel | SSRNL00005

Find | View All | First | 1 of 1 | Last

Academic Institution: PSNLD PeopleSoft University - NLD
 Academic Career: VAVO Advanced General Educ. (NLD)
 Academic Program: R007 VAVO ATH NW no profile
 Campus: MAIN Main Campus
 Academic Load: Full-Time

Find | View All | First | 1 of 1 | Last

Requisite ID: 00000002 Requisite HAVO | Result: Passed

Customize | Find | View All | First | 1-2 of 2 | Last

Sequence Number	Line Number	Description	Test ID	Test Description	Test ID HigLvl	Education Level	Description	Official Grade	Grade Attribute	Completed
10	10		00002287	Sk	00002156	VWO	Na1	8		☒
20	20		00000088	Combination Grade Havo Vavo	00002156	VWO	Na1	8		☒

Details Determination page

Test ID HigLvl (Test ID Higher Level)

Displays the higher level test ID if the lower level test ID has been substituted.

Education Level

Displays the education level from the HEGIS code linked to the test ID in the Test Catalog.

Approving Adjustments

Access the Adjust Approval page (Records and Enrollment, Test Administration NLD, Adjust Evaluation Results, Adjust Approval).

Adjust Approval

Adjust Result

CORNELIS MEIJER

SRN035

Find | View All

First1 of 1Last

Academic Institution:

PSNLD

PeopleSoft University - NLD

Academic Career:

BAC

Bachelor (NLD)

Academic Program:

H011

H011

Campus:

AMS

Amsterdam Campus

Academic Load:

Full-Time

Customize | Find | View All

First1 of 1Last

*Requisite ID	Description	*Approval Result	Result Date
		Passed	

Adjust Approval page

- Requisite ID

The requisite ID for which the student has been evaluated.
Requisites are defined on the Requisites table.
See [Chapter 19, "\(NLD\) Setting Up Test Administration," Defining Evaluation Rules, page 485.](#)
- Approval Result

If necessary, change the result to either *Passed* or *Not Passed*.
- Result Date

The system populates this field with the date on which the Evaluation process is run.

Adjusting Evaluation Results

Access the Adjust Result page (Records and Enrollment, Test Administration NLD, Adjust Evaluation Results, Adjust Result).

Adjust Approval

Adjust Result

Bert Wiegel

SSRNL00005

Find | View All

First

1 of 1

Last

Academic Institution:

PSNLD

PeopleSoft University - NLD

Academic Career:

VAVO

Advanced General Educ. (NLD)

Academic Program:

R007

VAVO ATH NW no profile

Campus:

MAIN

Main Campus

Academic Load:

Full-Time

Find | View All

First

1 of 1

Last

Requisite ID:

00000002

Requisite HAVO

Result:

Passed

Customize | Find | View All

First

1-2 of 2

Last

Order	Line Number	Test ID	Test Description	Official Grade	Completed	Correction Required	Test ID Hg/Lvl	Education level	Description		
10	10	00002287	Sk	9	☒	☐	00002156	VWO	Na1	+	-
20	20	00000088	Combination Grade Havo Vavo	8	☒	☐	00002156	VWO	Na1	+	-

Adjust Result page

- Order

Enter the requisite line number.
- Correction Required

Select if the test ID, official grade, or test ID higher level on this line can be replaced by another test ID.

Reporting Evaluation Data

Evaluation data is used to print diplomas and grade lists. The data is also used as a basis for official reporting to the Dutch government.

This section discusses how to run the appraisal report process.

Page Used to Report Evaluation Data

Page Name	Definition Name	Navigation	Usage
Appraisal Reporting	SSR_RUNAPPRREP_NLD	Records and Enrollment, Test Administration NLD, Appraisal Reporting, Appraisal Reporting	Start the Evaluation Reporting SQR process (SREVRPNL).

Running the Appraisal Report Process

Access the Appraisal Reporting page (Records and Enrollment, Test Administration NLD, Appraisal Reporting, Appraisal Reporting).

Appraisal Reporting			
Run Control ID: TATest		Report Manager Process Monitor	Run
*ID:	SRN015	HELMUS,ERIC M	
*Academic Institution:	PSNLD	PeopleSoft University - NLD	
*Academic Career:	VAVO	Advanced General Educ. (NLD)	
*Academic Program:	R004	Atheneum N&T	
*Tree Name:	TATTEST	*Tree EffDt:	01/01/1900
*From Date:	01/04/2005	*To Date:	05/31/2005
Run Date:			

Appraisal Reporting page

ID	Enter the ID for the student.
Academic Program	Enter the academic program.
Tree Name	Enter the name of the test tree name where the evaluation results are stored.
Tree EffDt (tree effective date)	Enter the effective date of the tree.
From Date and To Date	Enter the from and to dates for which the evaluation process was run.
Run Date	The system populates with the date on which the reporting process is run.

Loading and Viewing Grade Data in Test Trees

Load grade data in test trees either by student or by program, and then view the grades within the tree structure.

This section discusses how to:

- Load grade data into test trees by student.
- Load grade data into test trees by program.
- View a student's test trees.
- View a student's grades in a test tree.

Pages Used to Load and View Grade Data in Trees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Grades in Tree per Student	SSR_RUNTSTEMPL_NLD	Records and Enrollment, Test Administration NLD, Grades in Tree per Student, Grades in Tree per Student	Select students and run the Grades in Tree per Student SQR process (SRGITENL).
Grades in Tree per Program	SSR_RUN_CALTST_NLD	Records and Enrollment, Test Administration NLD, Grades in Tree per Program, Grades in Tree per Program	Select programs and run the Grades in Tree per Program SQR process (SRGITPNL).
Study Program - Test	SSR_STPRG_TREE_NLD	Records and Enrollment, Test Administration NLD, View Grades in Tree, Study Program - Test	View the test trees that are linked to the student.
Grades in Tree	SSR_STTRGRD_NLD	Records and Enrollment, Test Administration NLD, View Grades in Tree, Grades in Tree	View the individual test grades for the student.

Loading Grade Data into Test Trees by Student

Access the Grades in Tree per Student page (Records and Enrollment, Test Administration NLD, Grades in Tree per Student, Grades in Tree per Student).

Grades in Tree per Student

Run Control ID: TATest [Report Manager](#) [Process Monitor](#) Run

***Academic Institution:** PSNLD PeopleSoft University - NLD

***Academic Career:** BAC Bachelor (NLD)

Campus: MAIN Main Campus

***Term:** 2040 Acad year 2004-2005

Session: Regular Academic Session

***Current Effective Date:** 02/10/2005 Delete All Students

▼ Add Students

Basis: **Group:** Add Students

Customize Find View All First 1-3 of 3 Last				
	ID	Name		
1	SRN013	GELDER,NICOLAAS J		
2	SRN023	AMSTERDAM,DANIEL J		
3	SRN033	MEGGELEN,ADRIANA N		

Grades in Tree per Student

The fields on this page are the same as the fields on the Cumulative Grades per Student page.

See [Chapter 21, "\(NLD\) Managing Test Administration," Calculating Grades per Student, page 519.](#)

Loading Grade Data into Test Trees by Program

Access the Grades in Tree per Program page (Records and Enrollment, Test Administration NLD, Grades in Tree per Program, Grades in Tree per Program).

Grades in Tree per Program

Run Control ID: Test [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSNLD PeopleSoft University - NLD

*Academic Career: BAC Bachelor (NLD)

Campus: MAIN Main Campus

Customize | Find | View All | First 1 of 1 Last

*Academic Program	Description		
H010	H010	+	-

Grades in Tree per Program page

The fields on this page are the same as the fields on the Cumulative Grades per Program page.

See [Chapter 21, "\(NLD\) Managing Test Administration," Calculating Grades per Program, page 520.](#)

Viewing a Student's Test Trees

Access the Study Program - Test page (Records and Enrollment, Test Administration NLD, View Grades in Tree, Study Program - Test).

Study Program - Test

Grades in Tree

ERIC HELMUS SRN015

Academic Institution: PSNLD PeopleSoft University - NLD

Academic Career: BAC Bachelor (NLD)

Academic Program: H010 H010

Campus: MAIN Main Campus

Academic Load: Full-Time

Find | View All | First 1 of 1 Last

Effective Date: 09/01/2003 **Status:** Active

Tree Name	Tree EffDt	Description
TEST	01/01/1900	CAL02.1.3 Sports

Study Program - Test page

Viewing a Student's Grades in a Test Tree

Access the Grades in Tree page (Records and Enrollment, Test Administration NLD, View Grades in Tree, Grades in Tree).

Study Program - TestGrades in Tree

ERIC HELMUSSRN015

Academic Institution:PSNLDPeopleSoft University - NLD

Academic Career:BACBachelor (NLD)

Academic Program:H010H010

Campus:MAINMain Campus

Academic Load:Full-Time

Find | View AllFirst1 of 1Last

Effective Date:09/01/2003Status:Active

Find | View AllFirst1 of 1Last

Tree Name:TESTTree EffDt:01/01/1900

Customize | Find | First1-4 of 4Last

Grades in TreeDetails

Sequence	Test ID	Level1	Level2	Grades
1	000000008	CAL02.1.3 Sports		9.6
2	000000003		CAL02.1.3.3 Sports	
3	000000006		CAL02.1.3.2 Sports	
4	000000007		CAL02.1.3.1 Sports	

Grades in Tree page

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Chapter 22

(NLD) Managing Studielink Communications

All information about Studielink is located in the *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "(NLD) Managing Studielink"

Chapter 23

Performing Repeat Checking

This chapter provides an overview of the three repeat checking methods and discusses how to run the Repeat Rule Checking process in batch.

Understanding the Three Repeat Checking Methods

The Student Records Repeat Rule Checking process is flexible and robust. Much of repeat checking occurs automatically, without the user seeing it. However, Student Records also enables you to run the Repeat Rule Checking process in batch and manually.

Automatic Repeat Checking

Automatic repeat-checking processing occurs when you:

- Post enrollment requests.
- Post grades using the Enrollment Request page or the Quick Enrollment page.

Repeat checking does *not* occur when you post grades using the Student Enrollment page or the grade roster.

- Post transfer credit.

With automatic repeat-checking processing, you do not have to run a process through the process scheduler to check for repeats (although that is an option). After you perform a little setup, the system runs the process automatically.

Note the slight differences between the automatic repeat-checking processing through enrollment request grade posting and the automatic repeat-checking batch processing following grade posting and transfer credit posting.

When a student attempts to enroll in classes, the Repeat Rule Checking process scans the student's course history for a course ID or equivalent course ID that matches the requested course ID. If the process finds a matching pair, it can do one of three things: issue a warning that repeat codes might apply and that the enrollment might not count towards the student's degree, prevent the enrollment, or ignore the match. Note that the process does not assign repeat codes to the repeated course at this stage.

When you post grades (using the Enrollment Request page) and transfer credit, the Repeat Rule Checking process likewise scans the student's course history for a course ID or equivalent course ID that matches the ID of the course for which you are posting the grade or transfer credit. If the process finds a matching pair, it evaluates each course of the pair based on the repeat rules that you have created. Because the process can no longer prevent enrollment because the student has already taken the class, it assigns a repeat code. The process assigns a violation repeat code to the repeated course when the repeated course causes the student to exceed the total units allowed or total attempts allowed (as defined first on the Repeat Rule 2 page and later for each rule on the Repeat Rule Detail 1 page). Or the process assigns a repeat code to both courses in the matched pair when the repeated course is in violation of a particular repeat rule.

For example, you can set up a rule for the undergraduate career that allows students to repeat twice those courses in which they receive a failing grade. The Repeat Rule Checking process scans the student's history to identify other instances of this particular course ID or equivalent course ID. When the process finds a repeat and establishes the matched pair, it evaluates the current course to see if it violates the repeat rule's total attempts allowed and total units allowed. If either maximum has been exceeded, the Repeat Rule Checking process assigns a violation repeat code to only the current course in the matched pair. However, if the process determines that the repeat violates any of the established rules, it assigns repeat codes to the matched pair of courses.

Because automatic repeat checking during peak enrollment and grade-posting periods can negatively impact the performance of your system, you can temporarily suspend automatic repeat checking for the entire academic institution on the Academic Institution 5 page, for an academic career on the Repeat Checking page (Academic Career Table component), and for academic programs on the Taxonomy/Campus page (Academic Program Table component).

Automatic repeat checking is optional when processing transfer credit. You set this repeat checking control on the Academic Institution 5 page.

Repeat Checking in Batch

Run the Repeat Rule Checking process in batch through the Repeat Checking page or set up the Process Scheduler to run the process automatically. After grades are posted, you can run repeat checking in batch whenever you want in the term. However, you should not run the batch process more than once per term because codes that have been set in the first run can be inadvertently changed in subsequent runs.

When you use the grade roster to post grades, you must run the batch process to check courses against your repeat rules. The automatic Repeat Rule Checking process runs only when grades are posted using the Enrollment Request page. Therefore, one way to use the repeat checking in batch functionality is to run the batch process after most of your grades have been posted on the grade roster. Then, you can run repeat checking on grade input for individual students whose grades are posted after the batch process has been run.

You can run repeat checking in batch for all students in an entire academic career, for an academic program within an academic career, or for individual students. Repeat checking in batch can also be term-driven, running from a specific term and moving back in time.

Assigning Repeat Codes Manually

You can manually assign repeat codes to a student's record. For special individual cases, you can go into the student's record through the Student Enrollment page, the Quick Enrollment page, or the Enrollment Request page, depending on your security access, and select a value for the Repeat Code field. You can also use this method to change the repeat codes that the automatic process assigned. Assigning repeat codes manually affects academic statistics just as it would if the repeat codes were assigned using the Repeat Rule Checking process.

In addition, repeat rules contain certain exemption conditions. You can set up exemption codes on the Repeat Rule 2 page and manually assign these codes to a specific class on the Student Enrollment 1, Enrollment Request, or Quick Enrollment page. When the Repeat Rule Checking process finds a repeat, and the repeat rule specifies that an exemption exists, the process looks to see whether the repeat code that is exempted is assigned to the student's record.

For example, a repeat rule might demand that a repeat be approved by petition. Thus, an *Approved via Petition* repeat code would be listed as an exemption so that when a student received the approval, you could assign the appropriate repeat code to the student's enrollment record. The Repeat Rule Checking process would identify the enrollment as a repeat, but when it found the exempted repeat code on the current class, it would allow the enrollment. Exemption codes function for both front-end and back-end repeat check processing, allowing overrides to the total attempts allowed and total units allowed maximums that are established on the Repeat Rule 2 page.

See Also

[Chapter 5, "Setting Up Repeat Checking," page 47](#)

Running the Repeat Rule Checking Process in Batch

This section discusses how to run the Repeat Rule Checking process (SRPCERPT) in batch.

Page Used to Run the Repeat Rule Checking Process in Batch

Page Name	Definition Name	Navigation	Usage
Repeat Checking	RUNCTL_SR_RPTRULE	Records and Enrollment, Term Processing, End of Term Processing, Repeat Checking, Repeat Checking	Run the Repeat Rule Checking COBOL/SQL process (SRPCERPT) in batch, or set up the process scheduler to run the process automatically.

Running the Repeat Rule Checking Process in Batch

Access the Repeat Checking page (Records and Enrollment, Term Processing, End of Term Processing, Repeat Checking, Repeat Checking).

Repeat Checking

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

*Institution	*Career	Program	Term	ID	*Mode	*Check	*Scope		
PSUNV	UGRD	LAU		SR0400	A	A	E	+	-
PSUNV	UGRD	LAU	0550	SR0401	T	0	E	+	-
PSUNV	UGRD	LAU	0550	SR0402	T	0	E	+	-
PSUNV	UGRD	LAU	0550	SR0403	T	0	E	+	-
PSUNV	UGRD	LAU	0550	SR0404	T	0	E	+	-

Repeat Checking page

Institution Select the academic institution for which you want to run the process.

Career Select the academic career within the academic institution, or the academic career for a particular student, for which you want to run the process. If you do not select an academic program and ID, the process checks for repeats for every student in this academic career (you can also narrow the search by term).

Program Select the academic program for which you want to run the process. If you do not select an ID, the process checks for repeats for every student in this primary academic program (you can also narrow the search by term).

Term Select the term for which you want to run the process. The system uses the start date of the term as the effective date and uses repeat rules that are valid for the term.

ID If you want to check for repeats for particular students, select an ID. If you do not specify an ID, the process runs on all students in the academic career, primary academic program, and term that you selected.

Mode

From the following choices, select the mode for the repeat process. The system uses the aspect of the student's record that you select.

All/Entire Record: The Repeat Rule Checking process starts at the beginning of the student's record and progresses forward to the current term, considering all courses within the student's record. This mode is ideal for processing over many terms that have never been processed for repeat checking, for example, after converting student data. You should not specify values for the Term field when you run the Repeat Rule Checking process in the *All/Entire Record* mode.

Entire Term: The Repeat Rule Checking process checks for repeats against *only* the student enrollment records within the term that you specify in the Term field. The process starts with the specified term and progresses back in time looking *only* for matches of classes that were taken within the specified term. The Term field is required when you are running the process in this mode. This is the standard mode to use when running repeat checking in batch at the end of each term.

Note. Keep in mind that when you run the process in the *All/Entire Record* mode, any previous set repeat codes are subject to be changed.

Check

From the following choices, select which aspects of the student's enrollment records (STDNT_ENRL) the process should check.

All Courses: The process analyzes all student enrollment records within the mode and scope that you select.

Only Repeat Candidates: The process analyzes only those courses in the selected process term for which the repeat candidate flag on the STDNT_ENRL table is set to Y. Courses in prior terms can contain either a Y or N value.

Scope

From the following choices, select the scope of the process.

All Work for Term: The process considers all of the course work on the student's enrollment records, including course transfer credit.

Student Enrollments Only: The process considers only courses for which the student enrolled through the internal academic institution. Credit received by transfer is not considered.

Transfer/Test Credit: The process considers only course transfer credit.

If you select *All Work for Term* or *Transfer/Test Credit*, the Repeat Checking process assigns repeat codes to transfer credit, whether or not the Process on Transfer Credit check box on the Academic Institution 5 page is selected.

See Also

[Chapter 5, "Setting Up Repeat Checking," Understanding Repeat Checking Functionality, page 47](#)

[Chapter 5, "Setting Up Repeat Checking," Defining Repeat Rules, page 54](#)

Chapter 24

Managing the Schedule of Classes

This chapter provides an overview of the schedule of classes and discusses how to:

- Schedule new classes.
- Modify scheduled classes.
- Modify scheduled class meetings.
- View and update class sections.
- Roll data from the course catalog to the schedule of classes.
- Define class associations.
- Define class permissions.
- Create combined sections.
- Schedule examinations.
- Modify course events.
- View instructor schedules.
- View instructor schedules through self-service pages.
- View class facility usage.
- Search for an available facility.
- Search for classes.
- Print the Schedule of Classes report.
- Copy classes from one term to another.
- Clearing the Resource Queue table.

Understanding the Schedule of Classes

When you first set up your Student Records system, you schedule new courses for the first time. From then on, it is likely that you will roll classes from term to term, add any new courses to your schedule, and if necessary, revise classes that are already scheduled.

Note. After you set up your course schedule for the first time, you can set parameters along the way that command the system to roll, or copy, certain courses from term to term, and you can request that certain verifications are made against a student's record at enrollment request time. After you copy a prior term schedule to a new term, you can use the scheduling feature to move existing courses from time period to time period, to add sections, and so on.

The scheduling features in the Student Records application include the following four components:

1. Schedule of Classes
2. Schedule New Course
3. Schedule Class Meetings
4. Update Sections of a Class

The difference between these components is the view of the classes that you see:

- The Schedule of Classes component displays only those courses that have already been scheduled for a term.

Instead of having to search through the list of all available courses, you can use the schedule of classes component to view just those courses that you have already scheduled.

- The Schedule New Course component displays all courses available to schedule.
- The Schedule Class Meetings component displays individual class sections that have been scheduled.
- The Update Sections of a Class component displays a snapshot summary of section information for a class.

You can use this component to view and make changes to individual class sections so that when you save any changes to a section the system performs the save process faster.

Other features of the class schedule function that we discuss in this section include how you create class associations and student permissions for enrollment. We also move through the "combined sections" functionality so that you get an introduction of the power of the tools, and we review instructor schedules and class meeting patterns. Finally, we explore the facility search capabilities, producing the schedule of classes report, and copying classes from term to term.

Particular setup is required if you use the Classroom Scheduling Interface with a third party scheduling system. Refer to the PeopleSoft Student Records Classroom Scheduling Technical Notes document that is available on My Oracle Support at <https://support.oracle.com/CSP/ui/flash.html>.

Scheduling New Classes

This section provides an overview of new class scheduling, lists prerequisites, and discusses how to:

- Define basic data for class sections.
- Enter class fee information.
- Define class meeting patterns.

- Define auto enroll options and capacity.
- Define class reserve capacity.
- Link class notes to sections.
- Link exam times to classes.
- Define learning management system (LMS) data for classes.
- Define textbooks for classes.
- Interface class sections with the general ledger.

Understanding New Class Scheduling

Student Records possesses a great feature for easing your data entry in the schedule of classes. The four primary components are: Schedule New Course, Schedule of Classes, Schedule Class Meetings, and Update Sections of a Class. The components are identical, except that their search mechanisms differ.

In the Schedule New Course component you can view *all* courses from the course catalog that can be scheduled. In the Schedule of Classes component you can view *only* those courses that have been scheduled for a term. In the Schedule Class Meetings component you can view the Meetings page, the Enrollment Cntrl (enrollment control) page, and the Exam page, and make edits without accessing the entire class and all of its sections in the schedule of classes. In the Update Sections of a Class component you can view *only* individual class sections of a course that have been scheduled for a term.

We review the Schedule New Course component first, because it is where you begin.

To schedule a class:

1. Define sections, special class fees, topics, attributes, and course administrator information on the Basic Data page.
2. Enter class meeting times, days, facilities, instructors, and room characteristics on the Meetings page.
3. Define class status, capacity, auto enroll, and resection to section numbers on the Enrollment Cntrl page.
4. Define reserve capacity and enrollment requisites on the Reserve Cap (reserve capacity) page.
5. Link notes to class sections on the Notes page.
6. If you are manually scheduling exams for class sections, enter exam information on the Exam page.
7. Define textbook assignments for each class section on the Textbook page.
8. Assign classes (class item types) to specific general ledger accounts on the GL Interface page.

Prerequisites

Before you can schedule a new class, you must:

- Define your academic calendar, repeat rules, and course catalog.
- Define your facility IDs, topic IDs, and your instructor workload assignment types (if applicable).

- Define your reserve capacity enrollment requirement groups (if applicable).
- Define your note numbers (if applicable).
- Define your exam time codes and exam types (if applicable).
- Define your course material type values.
- Define your GL values.

See Also

Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," page 23

Pages Used to Schedule a Class

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Schedule of Classes - Basic Data	CLASS_ENTRY	• Curriculum Management, Schedule of Classes, Schedule New Course, Basic Data • Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Basic Data	Define sections, add specific class fees, topics, attributes, and designate a course administrator.
Class Fees Modal	CLASS_FEE_TBL_MDL	Click the Add Fee button on the Schedule of Classes - Basic Data page.	Enter the charge method for the component of the class.
Class Sub Fees Modal	CLASS_SUBFEE_MDL	Click the Add Fee button on the Schedule of Classes - Basic Data page.	Enter the details of the course fee.
Schedule of Classes - Meetings	CLASS_MTG_PATTERN	• Curriculum Management, Schedule of Classes, Schedule New Course, Meetings • Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Meetings	Define class meeting patterns and facilities, link instructors to classes, assign instructor workload values, and specify room characteristics.
Instructor Contact Hours	CLASS_MTG_PAT_HRS	Click the Contact Hours link on the Meetings page.	Review total course contact hours, weeks of instruction, and other contact hours information.

Page Name	Definition Name	Navigation	Usage
Combined Section Detail	CLASS_CMBND_SEC	If available, click the Combined Sections link on the Meetings or Enrollment Cntrl page.	Review all of the classes in the combined section
Schedule of Classes - Enrollment Cntrl (enrollment control)	CLASS_ENRL_CNTL	- Curriculum Management, Schedule of Classes, Schedule New Course, Enrollment Cntrl - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Enrollment Cntrl	Set enrollment limits and capacity requirements, and identify sections for which you want the system to auto enroll students.
Reserve Cap (reserve capacity)	CLASS_RSRV_CAP	- Curriculum Management, Schedule of Classes, Schedule New Course, Reserve Cap - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Reserve Cap	Assign reserve capacities for class sections. You can define any number of reserve capacity groups for a class. Reserve capacities are defined through the Enrollment Requirement Group component. When a student enrollment request is processed, the system automatically searches through the reserve capacities in sequential order and places the student in the first group with an available spot for which the student qualifies based on the reserve capacity group rules.
Schedule of Classes - Notes	CLASS_NOTES	- Curriculum Management, Schedule of Classes, Schedule New Course, Notes - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Notes	Link existing class notes or free-form text notes to class sections.

Page Name	Definition Name	Navigation	Usage
Exam	CLASS_EXAM	- Curriculum Management, Schedule of Classes, Schedule New Course, Exam - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Exam	Manually schedule final exams for class sections.
Textbook	SSR_CLASS_TEXTBOOK	- Curriculum Management, Schedule of Classes, Schedule New Course, Textbook - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, Textbook	Assign textbooks to class sections.
LMS Data	CLASS_LMS_SETUP	- Curriculum Management, Schedule of Classes, Schedule New Course, LMS Data - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, LMS Data	Enter LMS information for this class.
GL Interface	CLASS_TBL_GL	- Curriculum Management, Schedule of Classes, Schedule New Course, GL Interface - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, GL Interface	Map class section fees as item types to their proper General Ledger accounts. The system generates charges to the student's account based on the class and course code that you define in this component and offsets these charges based on the General Ledger that you define in this page. Your office needs to coordinate the information on this page with your controller's office.
Journal Set ChartFields	SSF_CF_WRKGRID_SEC	Click the Jrnl Set ChartFields link on the GL Interface page.	Continue to enter ChartField information that maps class section fees to their proper General Ledger accounts.

Defining Basic Data for Class Sections

Access the Schedule of Classes - Basic Data page (Curriculum Management, Schedule of Classes, Schedule New Course, Basic Data).

Basic Data		Meetings	Enrollment Cntrl	Reserve Cap	Notes	Exam	LMS Data	Textbook	GL Interface
Course ID:	007129	Course Offering Nbr:		1					
Academic Institution:	PeopleSoft University	Term:		2010 Spring					
Subject Area:	HISTORY	Undergrad		History					
Catalog Nbr:	100	Perspectives on the Present		Auto Create Component					
Class Sections Find View All First 1 of 3 Last									
*Session:	1	Regular Academic Session		Class Nbr:		2774			
*Class Section:	1	*Start/End Date:		01/24/2010 05/08/2010					
*Component:	LEC	Lecture		Event ID:		000021918			
*Class Type:	Enrollment								
*Associated Class:	1	Units:		3.00					
*Campus:	MAIN	Main		Add Fee					
*Location:	PSCSHCDA	Hacienda		☒ Schedule Print					
Course Administrator:		☐ Student Specific Permissions							
*Academic Organization:	HISTORY	History		☒ Dynamic Date Calc Required					
Academic Group:	LBART	College of Liberal Arts		☐ Generate Class Mtg Attendance					
*Holiday Schedule:	PSS	Academic Holiday Schedule		☒ Sync Attendance with Class Mtg					
*Instruction Mode:	P	In Person		☐ GL Interface Required					
Primary Instr Section:	1								
Class Topic									
Course Topic ID:		☐ Print Topic in Schedule							
Equivalent Course Group									
Course Equivalent Course Group:		☐ Override Equivalent Course							
Class Equivalent Course Group:									
Class Attributes									
*Course Attribute		*Course Attribute Value							

Schedule of Classes - Basic Data page

Auto Create Component	If you click this button, the system automatically creates one component for each of the components that you selected to auto create on the Course Catalog - Components page. The system populates the pages in the schedule of classes with the required data for each component. This saves you data entry and ensures that one section for each component is scheduled. If you have multiple class sections for each component type, you must still define the remaining class sections manually.
Class Section	For each component that the system creates automatically, enter the class section number. The system defaults into the Class Schedule Entry page the field values of the preexisting class section. Note. If you have begun to schedule sections of a course and you then click the Auto Create Component button, the process only creates a section for those components that are set to <i>Auto Create</i> on the course catalog and have not yet been scheduled.
Session	Enter the type of session to which the class sections of this course offering belong. If you want to schedule open entry/exit class sections, you must define them within an <i>OEE</i> session. Session values are delivered with your system as translate values. You can modify the codes and descriptions of these values except for <i>OEE</i> , where you can modify the descriptions only. Any modification to this code requires a substantial programming effort. In order for students to enroll in the <i>OEE</i> class sections that you define, you must either define the <i>OEE</i> Dynamic Date rule for each class section on the Dynamic Class Dates page or the Course Catalog - Offerings page.
Class Nbr (class number)	The system creates a unique class number identifier that students can use when they enroll in a class. The class number appears on the Schedule of Classes report. The system increments this number automatically, based on the number that you specify on the Term Value page.
Class Section	Enter the class section. It must be unique within course offering and session.
Start/End Date	The system populates this field by default to the start and end dates of the session (as specified on the Session Table page). You can override the dates for an individual class. The schedule of classes start and end dates can extend beyond the boundaries of the session begin and end dates.
Component	The system populates this field by default to the graded component on the Catalog Data page (such as <i>Lecture</i> , <i>Laboratory</i> , <i>Discussion</i> , and so on) of the course. You can have multiple components and sections within a course offering.

Class Type

The class type of *Enrollment* indicates which section is the primary section at enrollment time. The class type of *Non-Enrollment* is used to indicate that the section choice is the student's secondary enrollment option, or that the section is used in auto-enrollment. Within a class, only one component can possess the class type of *Enrollment*.

For example, at PSUNV Microbiology 240 has *Lecture*, *Laboratory*, and *Discussion* components. There are 5 lecture, 10 laboratory, and 15 discussion sections. We might select the discussion sections as the *Enrollment* sections, the lecture sections as the *Non-Enrollment* section using auto-enrollment, and the laboratory sections as *Non-Enrollment* sections with a student choice of lab section at enrollment time.

Associated Class

Select an associated class number from the list box, or enter an associated class value of your own. By using associated class numbers, you link class sections that constitute a single course offering. For instance, in our previous example, we'd gather a certain number of lecture, lab, and discussion sections into one associated class number to indicate that the three components are related to one another. If you are scheduling a new section, the system populates the Associated Class field to 1 by default.

When you schedule the first section of a course offering and use the prompt box, the system only displays this default value. You can use a prompt value, or you can manually enter any new one- to four-digit number into the field. Upon saving the page, the system extracts the necessary course data from the course catalog, creates a row in the Class Associations component for this class association number, and populates the row with the appropriate course catalog data. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course from within the same associated class number.

If you add a new class associations value to a scheduled class, and you want to make changes to the class association data that the system extracts from the course catalog, you must make your changes on the Class Associations component.

A special associated class number, 9999, enables you to associate a section with any other section. However, you can only use this associated class number for nongraded components.

Units

The units value is a related display based on the unit range defined on Class Associations component. When first scheduling a course, the system populates the Associated Class field to 1 by default. Once the section is saved, the unit value is defaulted from the Course Catalog to the Associated Class and is displayed on the Schedule of Classes. If the class association unit range is modified, the assigned unit value will accurately be reflected on the Schedule of Classes.

On subsequent pages within the Schedule of Classes, the unit range will be displayed within the Class Sections group box.

Campus	The system populates the Campus field by default from the Course Catalog - Offerings page, indicating the campus that offers the course. You cannot revise this default. If a specific campus was not identified in the course catalog and does not default, then you can, on a section-by-section basis, schedule classes at various campuses. Note. Because you cannot revise the campus value if one was provided on the course catalog level, it is best if you do not identify a specific campus on the Course Catalog - Offerings page unless absolutely necessary.
Location	Enter the location of the campus. Location values are linked to campuses on the Campus Table page. A campus must be specified before you select a location.
Course Administrator	Select the course administrator ID of the person in charge of the course (usually the primary instructor). This field is informational only.
Academic Organization	The system populates the academic organization by default from the Course Catalog - Offerings page. The academic organization refers to the organization that offers the class. You can override this value.
Academic Group	The system populates the academic group by default from the Course Catalog - Offerings page. Note. You can define global notes by academic group, which can appear on the Schedule of Classes report. In addition, academic group controls the valid meeting pattern values and their corresponding normal class duration values.
Instruction Mode	The system populates this field by default to <i>In Person</i>, but you can override the value. The instruction mode indicates whether the class is taught <i>In Person</i> or using <i>Interactive TV</i>, <i>World Wide Web</i>, <i>Correspondence</i>, and so on. Instruction mode values are defined on the Instruction Mode page. Important! You can generate attendance rosters for only those classes with an instruction mode value of <i>P</i>.
Primary Instr Section (primary instructional section)	Enter the primary instructional section number if applicable. This field is specifically used for distance learning classes. You can use this field to indicate in which section the instructor resides. This field is for informational purposes only.
Schedule Print	The setting of this check box populates by default to the setting on the Course Catalog - Offerings page. Select this check box to display the class in the schedule of classes. If you clear this check box, the section does not display in student or visitor class search when accessed through PeopleSoft Campus Self Service. Students can enroll in these classes, but only if they enter the exact class number (without using the class search feature).

Student Specific Permissions	Select this check box to set up student-specific class permissions. Student-specific permissions enable instructors or administrators to control section enrollment by granting advance add permission to individual students. Note. This applies only to add permissions. Drop permissions are always student specific, whether or not the check box is selected.
Include in Dynamic Date Calc (include in dynamic date calculation)	Select this check box to include this component of the class section in the Dynamic Class Dates process. The value that you select here populates by default from the corresponding field for the course offering component on the Course Catalog - Components page. For nonprimary components of a course offering, this check box is optional. You can override the default value on a section-by-section basis. For primary components, however, the system automatically selects and makes unavailable this check box because the Dynamic Class Dates process always uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses for the primary component the value as defined on the Class Associations - Class Components page. If you decide to include additional components of the class section in the Dynamic Class Dates process calculations, the process includes in its calculations the meeting times that fall within the start date and end date range of the primary component. For example, the lecture section is the primary component. The start and end dates for the lecture are 10 weeks apart, with the lecture meeting every Monday. For the dynamic class date rule, you use a rule scheme for drop dates that is based on the number of class meetings, and that each subsequent class meeting defines the next level drop deadline. If you include only the lecture in the Dynamic Class Date process calculations, the first drop deadline would be the second lecture, the second drop deadline would be the third lecture, and so on. However, you may also have a discussion component that meets once every Thursday for 10 weeks, starting the same week as the lecture. If you select to also include the discussion in the calculations, the first drop deadline would be the first discussion because it is the second class meeting. The second drop deadline would be the second lecture, the third drop deadline the second discussion, and the final drop deadline the third lecture.
Dynamic Date Calc Required (dynamic date calculation required)	The system automatically selects this check box whenever you make a change to the class meeting pattern or class dates of a class section within a dynamically dated session because these changes can potentially impact the Dynamic Class Date process calculations. When you run the Dynamic Class Dates process using the Process Scheduler (Dynamic Class Dates page), you have the option to use this field as a parameter. You can thus, for example, recalculate the landmark academic calendar dates for only the classes in which the class meeting pattern has been changed. See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i>, "Defining Dynamic Academic Calendars."

Generate Class Mtg Attendance (generate class meeting attendance)

Select this check box to indicate that you want the system to always generate attendance rosters for this class. This value defaults from the Course Catalog - Components page each time that you schedule a new course. By selecting this check box, you flag the class so that when you generate attendance rosters through the Attendance Roster Generator page and you select the Obey Generate Class Mtg Attendance check box, the generator creates attendance rosters only for classes that have this flag selected and that meet your processing criteria. If you clear this check box on the Attendance Roster Generator page, the system generates attendance rosters for all classes that meet your processing criteria, regardless of the check box setting on the Basic Data page. You can generate attendance rosters through the Class Attendance page regardless of this check box value.

GL Interface Required

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

Add Fee

To add a class section fee, you must click the Add Fee button for each new class section.

Class Topic

Course Topic ID

Enter a course topic ID to link course topics to class sections. Select a topic ID for the section. Topic ID values are defined on the Catalog Data page. Additionally, you can also attach topics to specific class meeting patterns.

Print Topic in Schedule

If you enter a topic ID, this check box becomes available for entry. The system selects this check box by default. You can change the setting.

Note. In order for the topic to appear on the transcript, you must select the Print Course Topic check box on the Transcript Type - Enrollment/Statistics page.

Equivalent Course Group

Course Equivalent Course Group

If the course is linked to an equivalent course group on the Catalog Data page, the system displays that information in this field and the Override Equivalent Course check box becomes available for entry.

Override Equivalent Course

Select to override the Catalog Data setting for this class section.

Class Equivalent Course Group

Enter another equivalent course group for the class section in this field.

Class Attributes

Course Attributes and Course Attribute Value

Use the Course Attributes field to link attributes to class sections. The system populates this field and the related course attribute values from the course catalog. You can override or amend these values. Values for course attributes are defined on the Catalog Data page.

Note. Course attributes are used primarily for institutional research and reporting purposes and to print repetitive text in the course catalog and schedule of classes. Course attributes are not used by the Academic Advisement application.

Entering Class Fee Information

Access the Class Fees Modal page (click the Add Fee button on the Schedule of Classes - Basic Data page).

Class Fees Modal

Class Sub Fees Modal

SetID:

PSUNV

Course ID:

007129 Perspectives on the Present

Delete Fee

Offer Number:

1

Term:

0640 2010 Spring

Session:

1 Regular Academic Session

Section:

1

Component:

LEC Lecture

Charge Method:

Always

☐ Charge for Wait Listed Class

☐ Charge for Course Fee

☒ Include in Pro-rata

☒ Include in other Withdrawal

Class Fees Modal page

Enter the charge method for the component of the class. These values are set up in PeopleSoft Student Financials tables.

The check box options enable you to specify when the system charges fees.

Class Sub Fees Modal

Access the Class Sub Fees Modal page (click the Add Fee button on the Schedule of Classes - Basic Data page).

Class Fees Modal

Class Sub Fees Modal

SetID: PSUNV

Course ID: 007129

Perspectives on the Present

Offer Number: 1

Term: 2010 Spring

Session: Regular

Class Section: 1

Component: Lecture

☐ Audit Rate specified

Sub Fees

Find | View All

First 1 of 1 Last

'Account Type:

'Item Type:

Fee Trigger:

☒ Use Criteria ☐ Use Equation

Course Rate ID:

Amount/Unit:

0.00

Amount/Unit (Audit):

0.00

Minimum Amount:

0.00

'Adjustment Code:

Waiver Group:

☐ Exclude HECS Students

Fee Amt Equation:

Flat Amount:

0.00

Flat Amount (Audit):

0.00

Maximum Amount:

0.00

USD

'Due Date Code:

Class Sub Fees Modal page

Enter the details of the course fee in this page. You are prompted from tables set up in the Student Financials application.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Setting Up Fees and Tuition Groups," Defining Class Fees.

Defining Class Meeting Patterns

Access the Schedule of Classes - Meetings page (Curriculum Management, Schedule of Classes, Schedule New Course, Meetings).

Basic Data		Meetings		Enrollment Cntrl		Reserve Cap		Notes		Exam		LMS Data		Textbook		GL Interface		
Course ID:	007129			Course Offering Nbr:			1											
Academic Institution:	PeopleSoft University																	
Term:	2010 Spring			Undergrad														
Subject Area:	HISTORY			History														
Catalog Nbr:	100			Perspectives on the Present														
Class Sections Find View All First 1 of 3 Last																		
Session:	1		Regular Academic Session		Class Nbr:		2774											
Class Section:	1		Component:	Lecture		Event ID:		000021918										
Associated Class:	1		Units:	3.00														
Meeting Pattern Find View All First 1 of 1 Last																		
Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	T	F	S	S	*Start/End Date						
KING104	50	MWVF	8:00AM	8:50AM	☒	☐	☒	☐	☒	☐	☐	01/24/2010 05/08/2010						
King 104		Topic ID:		Free Format Topic:														
☐ Print Topic On Transcript												Contact Hours						
Instructors For Meeting Pattern Customize Find View All First 1 of 1 Last																		
Assignment		Workload																
ID	Name	*Instructor Role	Print	Access	Contact	Empl Rcd#	Job Code											
SR12101	Litman,Edward	Prim In	☒	Post		0	420025											
Room Characteristics Customize Find First 1 of 1 Last																		
*Room Characteristic												*Quantity						
												1						

Schedule of Classes - Meetings page

Note. For institutions that schedule large numbers of sections of a class and have facility conflict check activated, use the Schedule Class Meetings component to schedule facility and meeting pattern information. Because the system only performs edit checks on an individual class section (rather than for all the sections of the class), you benefit from faster performance. To use the Schedule Class Meetings component to schedule facility and meeting pattern information, enter all information for the class, except facility and meeting pattern in the Schedule of Classes or Schedule New Course components. Then go to the Schedule Class Meetings component, enter the subject and catalog number for the class, select the first section, and then update the facility/meeting pattern information one section at a time, using the Next in List button on the tool bar to scroll through all the sections for the course.

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

Common Page Information

Event ID

The system creates a unique event ID record in the Event table when you schedule a class with a meeting pattern and facility ID. The Event table is used to record class and non-class events for room scheduling.

Facility ID	Enter a facility ID for the class. Facility values are defined on the Facility Table page.
Capacity	The system populates this field by default to the setting on the Facility Table page.
Pat(pattern)	Enter the class meeting pattern. Meeting patterns associated with the academic group for the class are available. Meeting pattern values are defined on the Academic Group Table - Standard Meeting Pattern page. Note. It is important that you enter the most important meeting pattern first. In some places in the system when viewing classes you can only see the meeting pattern which was entered first. Also, the system assigns a final exam code based on the first class meeting pattern.
Mtg Start (meeting start) and Mtg End (meeting end)	Enter the class meeting start and end times. The system defaults an end time after you enter a start time, based on the default Normal Class Duration set on the Academic Group table - Standard Meeting Pattern page.
M (Monday), T (Tuesday), W (Wednesday), T (Thursday), F (Friday), S (Saturday), and S (Sunday)	The system populates the meetings days by default based on what you enter in the Pat field.
Start/End Date	For the first meeting, the system populates these fields to the start and end date from the Session table. For all subsequent meetings you add, the system populates this field to the start and end dates on the Basic Data page. The meeting start and end dates must be assigned within the start and end date range assigned to the class on the Basic Data page.
Topic ID	Select a class topic ID for this class meeting pattern. For example, at PSUNV, ENGLLIT 299 meets on MWF and TTH. The MWF class covers "The Mystery Genre," while the TTH class covers "British Influence on US Writers." You can also link class topics to entire classes on the Basic Data page. Topic IDs are defined on the Catalog Data page.

Free Format Topic

Enter a free format topic if a predefined topic ID is not suitable. For example, if a professor wants to teach ENGLLIT 299 as "19th Century Novelists," but the topic had not been set up as a topic ID, you could enter it as a free format topic. You can only link free format topics to class meeting patterns.

Note. You cannot assign class meeting pattern topic IDs to combined sections. This would cause data integrity problems. For this reason, after sections are combined, the system makes the Topic ID field unavailable on the Meetings page. Instead, only assign free format topics to combined sections.

In addition, if you combine sections that already have class meeting pattern topic IDs assigned to them, the system deletes the topic IDs.

See [Chapter 24, "Managing the Schedule of Classes," Creating Combined Sections, page 600.](#)

Print Topic On Transcript

Select this check box to allow course topics to appear on the advisement report.

Course topics defined at the class meeting pattern must have this check box selected, as well as the Display Topics in AA Reports check box on the Transcript Type - Basic Data page, for the class meeting topic to appear.

See [Chapter 14, "Setting Up Transcripts," Designating Enrollment and Statistics Data, page 334.](#)

Note. Selecting this check box allows the class meeting pattern topic to be printed on both transcripts and advisement reports. To allow the topic to print on only one of the reports, correctly set the option to print topics on the transcript type for each report type.

Contact Hours

Click to access the Instructor Contact Hours page, where you can review total course contact hours, weeks of instruction, and other contact hours information.

Course Contact Hours

Derived from the course catalog.

Weeks of Instruction

Derived from the Session table.

Total

Equals the course contact hours multiplied by the weeks of instruction.

Total Course Contact Hours (Actual)

Calculated from the class meeting pattern. Equals the sum of the end time minus the start time for every meeting date, excluding holidays. The system only calculates this value for the graded component if a facility is booked for the class.

Combined Section

Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. After you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Assignments Tab

See the Meetings page exhibit for a view of this tab.

ID

Enter the ID of the instructor for the course. The system prompts you from the Personal Data view or one of seven Instructor/Advisor views. The prompt values depend on:

- The Edit Instructor Against option and the Assign Instructor By check box that your institution selects on the Academic Organization Table page for the academic organization to which this class belongs.
- The Edit Instructor Against option and the Assign Instructor By check box that your institution selects on the Academic Organization Table page for the academic organization to which this class belongs.

You can associate one or more instructors with each meeting pattern. The system carries forward the instructor ID from the previous meeting pattern when you add a new meeting pattern. Override the instructor ID if necessary.

Note. In order to accommodate the Instructor Workload feature, a single instructor may be assigned to more than one row, although this may not be common practice. For example, you may want to assign instructor A to teach 50 percent load factor with an assignment type of Internet, and another 50 percent load factor with an assignment type of *In Class Lecture*.

See [Chapter 25, "Tracking Instructor Workload,"](#) page 623.

Instructor Role

Enter the instructor role for the corresponding ID number. Values for this field are delivered with your system as translate values. You can modify these values. Insert rows to add multiple instructors and their corresponding instructor roles.

Note. For independent study courses for which the student can select one of several instructors, assign multiple instructors the *Primary* instructor role. If you select an Instructor Edit field value of *Class Instructor Edit* on the Class Associations page, only the primary instructors defined for the class on the Meetings page display on the Enrollment Request page during enrollment.

- Print** Select to display the instructor's name on the Schedule of Classes report. The system populates this check box by default to the setting on the Course Catalog - Offerings page.
- Access** Enter the grade roster access for this instructor. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The values work in hierarchical fashion:
- Approve:* Instructor can enter grades and approve the grade roster.
- Grade:* Instructor can only enter grades for the class.
- Post:* Instructor can enter grades, approve the roster, and post the grades.
- Contact** The values you enter in this field have no impact elsewhere in the system. The Contact field on this page has no programming tied to it, and does not relate to the delivered Instructor Workload feature in any way.
- Empl Rcd#** (employee record number) Relates job information to instructors for reporting purposes. In addition, the system displays a warning message if the FULL_PART_TIME value on the job does not coincide with the same field value on the instructor assignment class record related to the instructor assignment class on the Term Workload page.
- Job Code** Displays the value specified on the Accommodations page for a particular employee record.

Workload Tab

Select the Workload tab.

Instructors For Meeting Pattern									
Assignment		Workload							
ID	Name	Assign Type	App Load	Load Factor	Work Load	Auto Calc	Assignment FTE %		
SR12101	Litman,Edward	Lecture	☒	100.0000		☒		+	-

Schedule of Classes - Meetings page: Workload tab

- Assign Type** (assignment type) Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. The system populates the field by default from the Academic Institution 4 page and can be overridden. Only those assignment types current as of the term begin date and with the View on Schedule of Classes check box selected are available.

App Load (apply load)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. The check box indicates whether the assignment counts toward an individual's total term full time equivalent (FTE). percentage. The field corresponds to the Include Assignment in Workload check box on the Assignment Type page and cannot be overridden. The only way to change the setting of this check box is to select a different assignment type.

Load Factor

If desired, you can use this field to divide one course component into multiple assignments across instructors. Inserting multiple rows per course component and assigning each one a load factor (percent) enables you to divide a component into different assignment types among instructors. For example, you can assign instructor A to teach 30 percent of the lecture component, and instructor B to teach 70 percent of the lecture component. It is your responsibility to set the load factor. The total load factor on one course component should equal 100 percent. The system displays a soft warning message if the total does not equal 100 percent.

Work Load

In order to provide maximum ease in assigning workload hours to individuals, the system auto calculates default workload hours when you schedule classes. The system bases calculations on the academic progress units or course component workload hours for the class (set up on the class association and class component pages), multipliers both per subject/component and per instructor, and load factor. The Work Load field stores the resultant workload hours.

Manual modifications to work load hours are enabled and effect the Assigned FTE%.

See [Chapter 8, "Setting Up Instructor Workload," Course Component Workload Hours Formula, page 195.](#)

Auto Calc (automatic calculation)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. Select this check box if you want to have the workload value recalculated any time the user manually updates assignment type or load factor. The default is selected.

Note. Manually entering a value in the Work Load field clears the Auto Calc check box so that the manual entry is not overridden automatically if you change the assignment type or load factor. You can select the Auto Calc check box again; however, doing so recalculates workload.

Assignment FTE%
(assignment full time equivalency percentage)

Appears on this page if the Calculate Workload check box is selected on the Academic Institution 4 page. This value represents the particular assignment's weight based on the 100 percent weekly workload hours or the 100 percent OEE workload hours for the assignment type. For example, if the assignment type *Lecture* has 100% weekly workload hours set to 15, and you assign an instructor to teach a 3 hour lecture component with an assignment type of Lecture, the assignment FTE % is 20 (because 3 hours out of 15 makes 20%).

It is calculated and cannot be modified by the user.

Room Characteristics

Room Characteristic and Quantity

Use the Room Characteristic field to link room characteristics to classes. The system populates the Room Characteristic field and the Quantity field from the Course Catalog - Components page. You can override these values. The Room Characteristic field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum quantity of room characteristics for Schedule25 is 96. Therefore, be sure that you select values between 01 and 96.

Defining Auto Enroll Options and Capacity

Access the Schedule of Classes - Enrollment Cntrl page (Curriculum Management, Schedule of Classes, Schedule New Course, Enrollment Cntrl).

Basic Data		Meetings		Enrollment Cntrl		Reserve Cap		Notes		Exam		LMS Data		Textbook		GL Interface			
Course ID:	007129	Course Offering Nbr:				1													
Academic Institution:	PeopleSoft University	Term:				2010 Spring													
Subject Area:	HISTORY	Undergrad																	
Catalog Nbr:	100	History																	
				Perspectives on the Present															
Enrollment Control Find View All First 1 of 3 Last																			
Session:	1	Regular Academic Session				Class Nbr:		2774											
Class Section:	1	Component:	Lecture			Event ID:		000021918											
Associated Class:	1	Units:	3.00																
*Class Status:	Active			Cancel Class															
Class Type:	Enrollment			Enrollment Status:		Open													
*Add Consent:	No Consent			Requested Room Capacity:		35		Total											
*Drop Consent:	No Consent			Enrollment Capacity:		35		0											
1st Auto Enroll Section:				Wait List Capacity:				0											
2nd Auto Enroll Section:				Minimum Enrollment Nbr:															
Resection to Section:																			
☒ Auto Enroll from Wait List ☐ Cancel if Student Enrolled																			

Schedule of Classes - Enrollment Cntrl page

Class Status

The system populates this field to *Active* by default. Class status values are delivered with your system as translate values. You can override the status to indicate *Stop Further Enrollment*, *Cancelled Section*, or *Tentative Section*. The Schedule of Classes report enables you to select class status, so that you can print only *Active* classes, or only *Inactive* classes, and so on.

Note. When you select *Stop Further Enrollment*, *Cancelled Section*, or *Tentative Section*, the system sets enrollment status to closed. Classes with class statuses of *Stop Further Enrollment*, *Cancelled Section*, or *Tentative Section* do not appear in class search.

The class status of *Active* has coding attached to it and should not be deleted from the translate table. You can add as many new class status values to the translate table as you want, but they will not have coding attached to them.

Cancel Class

Click to cancel the class in view. The class status must be *Canceled Section*. The button processes one section cancellation at a time. If you want to cancel multiple sections, you must post your request for each section that you want to cancel.

Warning! If you want to cancel the section regardless of whether students are enrolled, you must select the Cancel if Student Enrolled check box. Doing so, however, drops any students who are enrolled in the section and requires that you recalculate tuition for those students.

Add Consent and Drop Consent

Values default from the Catalog Data page and indicate the type of consent, if any, that is required to enroll in or drop the class. You can override these values.

If you select *Instructor* or *Department*, consent is granted either by a permission number or a student specific permission. (Drop permissions are always student specific). The consent requirement can also be overridden during the enrollment process, by selecting the permission override.

Auto Enroll from Wait List

This check box is unavailable for open entry - open exit (OEE) classes (classes tied to an OEE session). Select to enable the COBOL/SQL Wait List process (SRCPWAIT) to move students from the wait list to enrolled status when a space opens up in the section. Spaces become available through enrollment drops or an enrollment capacity increase. Generally, when spaces become available in a section, the class status opens, allowing students to enroll. However, selecting this check box keeps the status closed so that you have time to move students from the wait list into the class by running the wait list process (before other students enroll).

If you do not select the Auto Enroll from Wait List check box and you have students on the wait list for the class, when the class status changes to open you cannot use the wait list process to move students from the wait list into the class.

You have to move wait listed students into the class manually, and students that are not on the wait list can enroll in the class.

See [Chapter 34, "Using Enrollment-Related Processes," Moving Students from Wait Lists to Enrollment, page 837.](#)

Note. "Enrollment" sections can only auto-enroll "non-enrollment" sections.

1st Auto Enroll Section and 2nd Auto Enroll Section

Enter a section within the same associated class number in which the system should automatically enroll students into the 1st Auto Enroll Section and 2nd Auto Enroll section. The auto enroll section must have a different component from the parent section.

Resection to Section

Enter the alternative section in which the system automatically enrolls a student if the primary section is full.

The component of the primary section and the resection to section class must be the same. For instance, when Section 1 Lecture is filled, the system enrolls students in Section 3 Lecture.

Cancel if Student Enrolled

Select for the system to process a request for a canceled class section regardless of whether students have already enrolled in the section. If you do not select this check box and you attempt to cancel a section in which students have enrolled, the system prevents you from posting the change, keeping the class status active. Thus, by leaving the box cleared you prevent inadvertently canceling a section in which students are enrolled.

Requested Room Capacity

Enter the requested room capacity for the class. Your room capacity can be different than your enrollment capacity. Because the system stores two separate capacity values, this field enables you to manipulate the enrollment capacity without affecting room scheduling. The system populates the Requested Room Capacity field by default from the default section size on the Course Catalog - Components page. This field is useful for you especially if you use Universal Algorithm's Schedule25 software.

For more information about the interface between Universal Algorithm's Schedule25 software and PeopleSoft Campus Solutions, see your Schedule25 documentation.

Enrollment Capacity	The system populates the enrollment capacity by default from the default section size on the Course Catalog - Components page.
Wait List Capacity	Enter the wait list capacity for the section to indicate the maximum number of students you want to allow to wait list for the class.
Minimum Enrollment Nbr (minimum enrollment number)	Enter the minimum enrollment number in order for the section to be offered. If the minimum enrollment number is not realized you might decide to cancel the section. This field is for informational purposes only.
Total	The system displays the current total of students enrolled and on the wait list for the section.
Combined Section	Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. After you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Defining Class Reserve Capacity

Access the Reserve Cap page (Curriculum Management, Schedule of Classes, Schedule New Course, Reserve Cap).

Basic Data

Meetings

Enrollment Cntrl

Reserve Cap

Notes

Exam

LMS Data

Textbook

GL Interface

Course ID:007129

Academic Institution:PeopleSoft University

Term:2010 Spring

Subject Area:HISTORY

Catalog Nbr:100

Course Offering Nbr:1

Undergrad

History

Perspectives on the Present

Class Sections

Find | View All

First

1 of 3

Last

Session:1

Class Section:1

Associated Class:1

Regular Academic Session

Component:Lecture

Units:3.00

Class Nbr:2774

Event ID:000021918

Reserve Capacity

Find | View All

First

1 of 1

Last

'Reserve Capacity Sequence:1

Enrollment Total:0

Reserve Capacity Requirement Group

Customize | Find |

First

1 of 1

Last

*Start Date

*Requirement Group

Cap Enrl

0

Schedule of Classes – Reserve Cap page

- Reserve Capacity Sequence

The system creates the reserve capacity sequence number indicating the order in which it evaluates the sets of requirement groups during enrollment. You can change this number. If you want to set up more than one requirement group for more than one start date, you must set up each one under its own sequence number. This is important to note because the system does not combine total cap enrollment values within the same reserve capacity sequence. Instead, the system selects and uses only one requirement group per reserve capacity sequence—the one that has the most current effective date.
- Enrollment Total

The total number of students enrolled as part of the reserve capacity sequence.

Start Date and Requirement Group

Enter the effective date for your reserve capacity. This date determines when the enrollment capacity requirement group becomes active. If you enter a subsequent row within the same reserve capacity sequence number, the system references the row with the current effective date and this row overrides all others within the sequence.

Select the requirement group for the reserve capacity. Values for requirement groups are defined through the Enrollment Requirement Group component. Students who attempt to enroll in the class and who satisfy the reserve capacity requirement group that you specify can enroll in the class up to the Cap Enrl value, (as long as the enrollment does not exceed the total enrollment capacity that you specify on the Enrollment Control page).

In order to set various enrollment capacities, or to discontinue the reserve capacity as of a certain date, you can add rows for the same requirement group with a later effective date. For example, if you want to change a reserve capacity for a class on a specific date, you can add a second row to the sequence with a Start Date value equal to the expiration date, and enter a new enrollment capacity for the row.

You can also use this method to *expire* reserve capacities (instead of deleting the reserve capacity sequence and losing your historical data). Under the same reserve capacity sequence, insert a new effective-dated row with the date that you want the reserve capacity to expire, then enter the same requirement group number and set the enrollment capacity to 0.

Warning! If you expire (set to 0) the Cap Enrl field value for any reserve capacity sequence row within the section, the system inactivates all reserve capacity sequence values for the section.

Cap Enrl (capacity enrollment) The maximum number of seats that you want to reserve for students who satisfy the requirement group parameters. The system combines the values of the most recent row of each requirement group.

The system does not combine this value with other capacity enrollment values within the same sequence number unless the requirement group is different. Otherwise, the system only combines the most current row for each reserve capacity sequence.

See Also

[Chapter 7, "Setting Up Enrollment Requisites," page 131](#)

Linking Class Notes to Sections

Access the Schedule of Classes - Notes page (Curriculum Management, Schedule of Classes, Schedule New Course, Notes).

Basic Data		Meetings		Enrollment Cntrl		Reserve Cap		Notes		Exam		LMS Data		Textbook		GL Interface	
Course ID:	007129	Course Offering Nbr:						1									
Academic Institution:	PeopleSoft University	Term:						Undergrad									
Subject Area:	HISTORY	History						History									
Catalog Nbr:	100	Perspectives on the Present						Perspectives on the Present									
Class Sections Find View All First 1 of 3 Last																	
Session:	1	Regular Academic Session						Class Nbr: 2774									
Class Section:	1	Component:	Lecture						Event ID: 000021918								
Associated Class:	1	Units:	3.00														
Class Notes Find View All First 1 of 1 Last																	
Sequence Number:	1																
Print Location:	After	☐ Even if Class Not in Schedule															
Note Nbr:																	
Free Format Text:																	

Schedule of Classes - Notes page

Sequence Number The system creates a class notes sequence number. The number determines the display order of the class notes for a section if multiple notes exist. You can override this number.

Print Location Enter the print location of the note, either *Before* the class listing, or *After* it.

Even if Class Not in Schedule This check box has no programming tied to it.

Note Number Enter a note number to reference a preexisting note. The note's description appears adjacent to the note number. Note number values are defined on the Class Notes Table page.

Free Format Text Enter a free format text note.

Copy Note Click to copy the note number text to the free format text. The note can then be modified to accommodate the class section. This eliminates the note number and note text.

Clear Note Click to clear the free format text.

See Also

[Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Class Notes, page 24](#)

Linking Exam Times to Classes

Access the Exam page (Curriculum Management, Schedule of Classes, Schedule New Course, Exam).

Basic Data

Meetings

Enrollment Cntrl

Reserve Cap

Notes

Exam

LMS Data

Textbook

GL Interface

Course ID:007129

Course Offering Nbr:1

Academic Institution:PeopleSoft University

Term:2010 Spring

Subject Area:HISTORY

Catalog Nbr:100

Undergrad

History

Perspectives on the Present

Class Sections

Find | View All

First

1 of 3

Last

Session:1

Regular Academic Session

Class Nbr:2774

Class Section:1

Component:Lecture

Event ID:000021918

Associated Class:1

Units:3.00

Exam Seat Spacing:

Final Exam:Last Class Meeting

Class Exam

Customize | Find

First

1 of 1

Last

Exam Time Code	Combined Exam	Exam Date	Exam Start	Exam End	Class Exam Type	Facility ID	Building	Room
	☐				Final			

Schedule of Classes – Exam page

- Exam Seat Spacing

If you indicate that a final exam will occur on the Course Catalog - Components page, the system populates the Exam Seat Spacing field by default from that page. It indicates the number of seats between students during the final exam and is for informational purposes only. You can override this number.
- Exam Time Code

By entering a predefined exam time code, you save yourself some data entry time for the exam date, time, and facility values. Exam time values are defined on the Exam Code Table page.
- Combined Exam

Select to indicate that this exam can share a facility with another exam.

Note.

Time and facility conflicts with other events, such as regular class meetings, are not permitted—the system performs conflict checking for these.

If you do not select the Combined Exam check box, the system verifies that no conflicts exist in room and time period scheduling. The stated room and time period is used for only one class exam.
- Exam Date, Exam Start, Exam End, Class Exam Type, and Facility ID

If you do not select an exam time code, you can enter values in the Exam Date, Exam Start, Exam End, Class Exam Type, and Facility ID fields. The system performs facility conflict checking when you save the page.

Defining LMS Data for Classes

Access the LMS Data page (Curriculum Management, Schedule of Classes, Schedule New Course, LMS Data).

Basic Data		Meetings		Enrollment Cntrl		Reserve Cap		Notes		Exam		LMS Data		Textbook		GL Interface		
Course ID:	007129			Course Offering Nbr:			1											
Academic Institution:	PeopleSoft University																	
Term:	2010 Spring						Undergrad											
Subject Area:	HISTORY						History											
Catalog Nbr:	100						Perspectives on the Present											
Class Sections Find View All First 1 of 3 Last																		
Session:	1			Regular Academic Session			Class Nbr:			2774								
Class Section:	1			Component:			Lecture			Event ID:			000021918					
Associated Class:	1			Units:			3.00											
Learning Management System																		
Provider for Authentication																		
LMS Extract File Type:				XML V1.1 (req to authenticate)														
LMS Extract Group ID:				PSUNV-HISTORY-100-SEC1														
LMS URL:																		
Last LMS Class Extract Datetm:				Last LMS Enroll Extract Datetm:														

Schedule of Classes – LMS Data page

Provider for Authentication

If your institution utilizes the learning management systems feature with self-service user authentication, enter the LMS Authentication Provider. The provider for authentication appears by default according to the provider assigned on the Components page in the Course Catalog component. For instances in which the Components page has no Provider for Authentication, the system uses the setting on the Academic Institution 3 page. The LMS Authentication is designed to be used with the XML V1.1 LMS Extract File Type. Providers are defined on LMS Provider Setup page.

PeopleSoft Campus Self Service provides a direct link for enrolled students and the instructor to the third-party web site for classes assigned an LMS Authentication Provider.

LMS Extract File Type

(learning management system file type)

If your institution utilizes the learning management systems feature, enter the LMS file type that you use as your interface. The file type defaults according to the LMS file type on the Course Catalog - Components page. In instances where the Course Catalog - Components page has no LMS File Type, the system uses the setting on the Academic Institution 3 page. Values are *XML V1.1*, *Blackboard CourseInfo 4*, and *API Input Format*. WebCT Campus Edition and Vista both support XML V1.1.

LMS Extract Group ID (learning management system group ID)	When you select an LMS file type, the LMS Group ID field populates automatically to academic institution, subject area, catalog number, and section number. For the XML file type, values are separated by dashes, such as TERM-INSTITUTION-SUBJECT-CATALOG NBR-SEC#. For authentication to work as designed, do not edit this entry. For XML extracts, at runtime, the system always appends "term-" to the beginning of the string and "-class number" at the end of the string.
LMS URL (learning management system URL)	If you are using a provider for authentication, do not enter an LMS URL. If you do not want to use LMS authentication, but want to link students enrolled in a class to a designated URL such as an instructor's website, you can specify the website in the LMS URL field. The URL must be preceded by the http:// designation.
Last LMS Class Extract Datetm (class extract date/time)	This field is empty when you first schedule a class, and it automatically populates with a date and time when you extract class data. In addition, the LMS extract process uses this field to distinguish between <i>Snapshot</i> and <i>Update</i> data. Presence of this date means that a class is "ignored" by the extract process if run in update mode and the record is not new or no changes to the class have taken place. No date means that the class is extracted for the LMS update extract and the date is updated to the run date.
Last LMS Enrol Extract Datetm (enrollment extract date/time)	This field is empty when you first schedule a class, and it automatically populates with a date and time value when you extract membership data. In addition, the LMS extract process uses this field to distinguish between <i>Snapshot</i> and <i>Update</i> data. Presence of this date means that enrollment data is "ignored" by the extract process if run in update mode, and the record is not new or no changes have taken place to enrollment status, grading basis, or grade. No date means that enrollment data is extracted for the LMS update extract and the date is updated to the run date.

Note. Currently, the system passes all classes individually to the LMS at the component level, including those that comprise a combined section. Combined section data is provided within the XML extract.

Defining Textbooks for Classes

Access the Schedule of Classes – Textbook page (Curriculum Management, Schedule of Classes, Schedule New Course, Textbook).

Basic Data		Meetings	Enrollment Cntrl	Reserve Cap	Notes	Exam	LMS Data	Textbook	GL Interface																																
Course ID:	007129	Course Offering Nbr:			1																																				
Academic Institution:	PeopleSoft University																																								
Term:	2010 Spring	Undergrad																																							
Subject Area:	HISTORY	History																																							
Catalog Nbr:	100	Perspectives on the Present																																							
Class Sections Find View All First 1 of 3 Last																																									
Session:	1	Regular Academic Session			Class Nbr: 2774																																				
Class Section:	1	Component:	Lecture		Event ID: 000021918																																				
Associated Class:	1	Units:	3.00																																						
Textbook Assignment																																									
Textbook Assignment Status ☐ Pending ☒ Textbook entry complete ☐ No textbooks assigned to class Copy Textbooks																																									
Customize Find First 1-3 of 3 Last <table border="1"> <thead> <tr> <th>Seq No</th> <th>*Course Material Type</th> <th>*Course Material Status</th> <th>Title</th> <th>ISBN</th> <th>Author</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Textbook</td> <td>Required</td> <td>The American Future: A History</td> <td>9870670044795</td> <td>Simon Schama</td> <td>+</td> <td>-</td> </tr> <tr> <td>2</td> <td>Textbook</td> <td>Required</td> <td>The World: A History, Volume 1</td> <td>9870131777644</td> <td>Felipe Fernandez-Armesto</td> <td>+</td> <td>-</td> </tr> <tr> <td>3</td> <td>Article</td> <td>Recomm</td> <td>The Nation magazine - Feb 2006</td> <td></td> <td></td> <td>+</td> <td>-</td> </tr> </tbody> </table>										Seq No	*Course Material Type	*Course Material Status	Title	ISBN	Author			1	Textbook	Required	The American Future: A History	9870670044795	Simon Schama	+	-	2	Textbook	Required	The World: A History, Volume 1	9870131777644	Felipe Fernandez-Armesto	+	-	3	Article	Recomm	The Nation magazine - Feb 2006			+	-
Seq No	*Course Material Type	*Course Material Status	Title	ISBN	Author																																				
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3	Article	Recomm	The Nation magazine - Feb 2006			+	-																																		
Special Instructions Additional articles will be assigned throughout the term and will be available in the History dept office																																									

Schedule of Classes – Textbook page

Note. Course materials entered on this page appear on the Class Detail page and on the Faculty and Student Textbook Summary pages. When the Textbook Assignment Status is *Pending*, the data is available only on administrative, Instructor and Advisor pages. Students and visitors receive a message: *Textbooks to be determined*. When the Textbook Assignment Status is *Textbook entry complete*, the data is then available to students and visitors.

Textbook Assignment Status Select Pending to indicate that the textbook data that you are entering for the class is not final.

The system displays pending textbook information to administrators, instructors and advisors only. Students and visitors cannot view pending textbook information. They receive a message: *Textbooks to be determined*.

Pending is selected by default.

Select Textbook entry complete after you complete entering textbook assignments. This option indicates that the textbook data is final. When you select this option, the textbook data is available to all users, including students and visitors.

No textbooks assigned to class Select this check box if no textbooks are to be assigned to the class section, for example, no textbooks are required for MUSIC 398, Individual Instruction. The Textbook Assignment Status must be set to Textbook entry complete, in order for students to view the message: *No textbooks required for this class.*

Copy Textbooks Click this button to copy the textbook and special instructions from another class to the current class. The copied assignments replace any existing assignments and special instructions for the current class.

Course Materials

Select the Course Materials tab (view this tab in the previous example of the Textbook page).

Course Material Type For each course material assignment, enter the course material type. Valid values are defined on the Course Material Type table. Examples include textbook, article, and other course materials.

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Course Material Types, page 28.](#)

Course Material Status Enter the course material status. Values for this field are delivered with your system as translate values. The values are *Required* and *Recommended*. You can modify these values.

ISBN No edits are performed on the ISBN field.

Details

Select the Details tab.

Course Materials Details Notes									
Seq No	*Course Material Type	*Course Material Status	Title	Publisher	Edition	Year Published	Price	Currency Code	
1	Textbook	Required	The American Future: A History	Harper Luxe		2009	29.00	USD	+ -
2	Textbook	Required	The World: A History, Volume 1	Prentice Hall	2nd	2009	104.00	USD	+ -
3	Article	Recomm	The Nation Magazine - Feb 2006					USD	+ -

Schedule of Classes – Textbook page: Details tab

The values in the Course Material Type, Course Material Status, and Title fields are carried forward from the Course Materials tab.

Year Published Enter the year that the course material edition was published.

Price Enter the recommended retail price.

Currency Code

Enter the currency code. The base currency code defined on the Installation Table (Set Up HRMS, Install, Installation Table, HRMS) Options tab is selected by default.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Integrating Campus Solutions with Human Capital Management."

Notes

Select the Notes tab.

Course Materials Details Notes Customize Find First 1-3 of 3 Last					
Seq No	*Course Material Type	*Course Material Status	Title	Course Material Notes	
1	Textbook	Required	The American Future: A History		+ -
2	Textbook	Required	The World: A History, Volume 1		+ -
3	Article	Recomm	The Nation Magazine - Feb 2006	Renewing America article	+ -

Schedule of Classes – Textbook page: Notes tab

The values in the Course Material Type, Course Material Status, and Title fields are carried forward from the Course Materials tab.

Interfacing Class Sections with the General Ledger

Access the GL Interface page (Curriculum Management, Schedule of Classes, Schedule New Course, GL Interface).

Basic DataMeetingsEnrollment CntrlReserve CapNotesExamLMS DataTextbookGL Interface

Course ID:007129Course Offering Nbr:1

Academic Institution:PeopleSoft University

Term:2010 SpringUndergrad

Subject Area:HISTORYHistory

Catalog Nbr:100Perspectives on the Present

Class SectionsFind | View AllFirst1 of 3Last

Session:1Section:1☐ Revenue From Item Type

Write-off ChartFields:*****

JournalsFindFirst1 of 1Last

Jrnl Set:

Timing:

+

-

DB/CR:

GL Pct:

Priority:999

Priority Amount:USD

Account Limit:

☐ Defer Revenue - Until:

Jrnl Set ChartFields:☐ Dynamic OrganizationDeferred ChartFields:☐ Deferred Dynamic Org

Schedule of Classes - GL Interface page

On this page, next to the Jrnl Set field, copy and paste icons are available. Use the copy icon to copy the setup for the row, which can then be pasted to the new, or any proceeding row.

Revenue From Item Type

Select if you do not want to track revenue by class. The system will allocate revenue based on the credit entry defined for the tuition item type. In this case, you do not populate ChartField information.

The system automatically tracks receivables for a class based on the debit entry defined for the tuition item type (on the Item Types - GL Interface page). If you want to track revenue by class, you must select the GL Interface Required check box on Schedule of Classes - Basic Data page and then enter a credit entry for the class by completing the ChartFields on this page.

Jrnl Set ChartFields (journal set ChartFields)

Click the link to enter additional information on the Journal Set ChartFields page.

To input all areas for the ChartFields, abbreviated display fields have been added. The number of delimiters displayed is based on the number of ChartFields.

The abbreviated display fields are used to view the ChartField set up as a string, add or update the ChartField string. All ChartField edits set up on the SF Installation page are adhered to within the display field.

See Also

PeopleSoft Student Financials 9.0 PeopleBook, "Using GL Interface Processing"

PeopleSoft Student Financials 9.0 PeopleBook, "Completing Student Financials General Setup," Mapping Item Types to General Ledger Accounts

Modifying Scheduled Classes

Use the Schedule of Classes component when you want to modify or maintain data for classes that have been scheduled. The functionality of the pages in this component are identical to the Schedule New Course component, but the view of classes offered to you is limited to scheduled classes only.

For institutions that schedule large numbers of sections of a class and have facility conflict check activated, use the Schedule Class Meetings component to edit facility and meeting pattern information for scheduled classes. Because the system performs edit checks only on an individual class section (rather than for all the sections of the class), you benefit from faster performance.

Note. To use the Schedule Class Meetings component to schedule facility and meeting pattern information, enter all information for the class, except facility and meeting pattern in the Schedule of Classes or Schedule New Course components. Then go to the Schedule Class Meetings component, enter the subject and catalog number for the class, select the first section, and update the facility/meeting pattern information one section at a time, using the Next in List button on the tool bar to scroll through all the sections for the course.

Modifying Scheduled Class Meetings

This section provides an overview of modifications to scheduled class meetings and discusses how to:

- Update meetings information.
- Update enrollment control information.
- Update exam information.

Understanding Modifications to Scheduled Class Meetings

Use the Schedule Class Meetings component when you want to modify or maintain data for an individual class section that has been scheduled. This component contains three pages—the Meetings page, the Enrollment Cntrl page, and the Exam page. These pages are the same as those in the Schedule New Course and Schedule of Classes component.

For example, if you have a course that has 20 scheduled sections for a term and you want to make changes to only two of those 20 sections, you can use the Schedule Class Meetings component to make the necessary changes to each of those two sections individually. Because the system has to run edit checks only on the individual class section rather than all 20 class sections, you benefit from the system's faster performance.

To modify a scheduled class meeting:

1. Update meeting times, facility reservations, and instructor assignments on the Schedule Class Meetings - Meetings page.
2. Update class size, wait list limits, class status, and consent on the Schedule Class Meetings - Enrollment Cntrl page.
3. Link exams and edit exam facility information on the Schedule Class Meetings - Exam page.

Pages Used to Modify Class Meeting Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Schedule Class Meetings - Meetings	CLASS_MTG_PAT_SCTN	Curriculum Management, Schedule of Classes, Schedule Class Meetings, Meetings	Update meeting times, facilities, and instructors for one class section at a time.
Schedule Class Meetings - Enrollment Cntrl (enrollment control)	CLASS_ENRL_CN_SCTN	Curriculum Management, Schedule of Classes, Schedule Class Meetings, Enrollment Cntrl	Update class status values.
Schedule Class Meetings - Exam	CLASS_EXAM_SCTN	Curriculum Management, Schedule of Classes, Schedule Class Meetings, Exam	Link exams to one class section at a time and to edit facility information.

Updating Meetings Information

Use the Schedule Class Meetings - Meetings page to update meeting times, facilities, and instructors for one class section at a time.

See Also

[Chapter 24, "Managing the Schedule of Classes," Defining Class Meeting Patterns, page 552](#)

Updating Enrollment Control Information

Use the Schedule Class Meetings - Enrollment Cntrl page to easily update class status values. In particular, when you need to cancel a class that has multiple sections, it is more efficient to use this component than to cancel the section through the Schedule of Classes component. Most fields on this page are display only because the primary reason for accessing this class meeting is to update the class status value.

See Also

[Chapter 24, "Managing the Schedule of Classes," Defining Auto Enroll Options and Capacity, page 559](#)

Updating Exam Information

Use the Schedule Class Meetings - Exam page to link exams to one class section at a time and to edit facility information.

See Also

[Chapter 24, "Managing the Schedule of Classes," Linking Exam Times to Classes, page 566](#)

Viewing and Updating Class Sections

This section lists a prerequisite and discusses how to review class sections.

Review or update a class section as follows:

1. Access the Update Sections of a Class page.
2. Modify data for the specific class sections that you want to update.

Prerequisite

You must first schedule the class.

See Also

[Chapter 24, "Managing the Schedule of Classes," Scheduling New Classes, page 540](#)

Page Used to View and Update Class Sections

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Update Sections of a Class	CLASS_CONTROL	Curriculum Management, Schedule of Classes, Update Sections of a Class, Update Sections of a Class	Review or modify a snapshot summary of section information for a class. The page displays one row for each section scheduled for a course offering during a term.

Reviewing Class Sections

Access the Update Sections of a Class page (Curriculum Management, Schedule of Classes, Update Sections of a Class, Update Sections of a Class).

Update Sections of a Class

Course ID:001234

Academic Institution:PeopleSoft University

Term:2003 Fall

Subject Area:ANTHRO

Catalog Nbr:101

Course Offering Nbr:1

Undergrad

Anthropology

Introduction to Anthropology

Class Sections

CustomizeFindView All

First1-2 of 2Last

Class Status

Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Add Consent	*Drop Consent	Schd Print
Regular	1	1023	Lecture	Closed	E	A	1				D	N	☒
Regular	100	1321	Lecture	Closed	E	A	1				N	I	☒

Update Sections of a Class page

Note. Multiple views of this page are available by selecting the tabs in the scroll area.

Class Status Tab

Class Type

The class type of *E* (enrollment) indicates which section is the primary section at enrollment time. The class type of *N* (non-enrollment) is used to indicate that the section choice is the student's secondary enrollment option, or that the section is used in auto-enrollment. Within a class, only one component can possess the class type of *E*.

Class Stat (class status)

The system populates the Class Stat field to *A* (active) by default. Class status values are delivered with your system as translate values. You can override the status to indicate *Stop Further Enrollment*, *Cancelled Section*, or *Tentative Section*. The Schedule of Classes report enables you to select on class status, so that you can print only *Active* classes, or only *Inactive* classes, and so on.

Note. The class status of *Active* has coding attached to it and should not be deleted from the translate table. You can add as many new class status values to the translate table as you want, but these will not have coding attached to them.

Assoc (associated class number)

The system displays the associated class number. You can edit this field if no students have yet enrolled in the section.

Auto Enrl 1 (auto enroll 1)

For classes that have associated auto enroll sections, you can view or edit the first auto enroll section.

Auto Enrl 2 (auto enroll 2)

For classes that have associated auto enroll sections, you can view or edit the second auto enroll section.

Resection

Enter the alternative section in which the system automatically enrolls a student if the primary section is full.

The component of the primary section and the resection to section class must be the same. For instance, when Section 1 Lecture is filled, the system enrolls students in Section 3 Lecture.

Add Consent and Drop Consent

Values default from the Enrollment Cntrl page and indicate the type of consent, if any, that is required to enroll in or drop the class. You can change these values.

If you select *Instructor* or *Department*, consent is granted either by a permission number or student-specific permission. (For drop permissions, consent is granted on a student-specific basis only.) The consent requirement can also be overridden during the enrollment process, by using the permission override.

Schd Print (schedule print)

The system populates this check box by default from the Schedule Print check box on the Basic Data page. Select this check box to display the class in the schedule of classes. If you clear this check box, the section does not display in the Schedule of Classes - Class Search function if accessed through Campus Self Service. Similarly, if you clear this check box, students using the self-service enrollment feature do not see this class in their class search results. They can enroll in the class, but only if they enter the exact class number (without using the class search feature).

Note. Section numbering is important because the system sorts by section number on this page and in the schedule of classes report.

Class Enrollment Limits Tab

Access the Class Enrollment Limits tab.

Class Sections								
Class Status		Class Enrollment Limits						
Session	Section	Class Nbr	Component	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Min Enrl
Regular	1	1023	Lecture	0				
Regular	100	1321	Lecture	0		20		

Update Sections of a Class page: Class Enrollment Limit tab

Use the Class Enrollment Limits tab to view summary enrollment information for a class. The page displays one row for each section scheduled for a course offering.

Cap Enrol (capacity enrollment)

The system populates this field by default to the Enrollment Capacity field on the Enrollment Cntrl page.

Tot Enrl (total enrollment)

The system displays the current total of students enrolled in the class section.

Wait Cap (wait list capacity)	The system displays the current total of students wait listed for the class section.
Wait Tot (wait list total)	The system populates this field by default to the Wait List Total field as displayed on the Enrollment Cntrl page.
Min Enrl (minimum enrollment)	The system populates this field by default to the Minimum Enrollment Nbr field on the Enrollment Cntrl page.
Combined Section	Click to access the Combined Section Detail page, where you can view all of the classes in the combined section. This link only appears for combined classes.

Note. After you combine classes, you must perform updates to meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for entry for combined sections.

Rolling Data from the Course Catalog to the Schedule of Classes

This section discusses how to run the Course Roll process.

Update the schedule of classes with changes that you have made to a course offering in the course catalog after you have scheduled a class or enrolled students.

To copy data from the course catalog to the schedule of classes:

1. Access the Course Roll page and specify the course offering that has recent changes.
2. Compare the information on the top of the page with the information for each section.
3. If the information differs, click the Course Roll button to copy the catalog information down to the individual class sections.

Prerequisite

You must first create your catalog and schedule of classes.

Page Used to Roll Data from the Course Catalog to the Schedule of Classes

Page Name	Definition Name	Navigation	Usage
Course Roll	CRSE_ROLL	Curriculum Management, Roll Curriculum Data Forward, Course Roll, Course Roll	Upon entering the page, the system prompts you to select a course offering from a list of courses already in the schedule of classes for a given term and session.

Running the Course Roll Process

Access the Course Roll page (Curriculum Management, Roll Curriculum Data Forward, Course Roll, Course Roll).

Course Roll

Course ID: 001234 Introduction to Anthropology

Status: Active

Institution: PSUNV PeopleSoft University

Eff Date: 01/01/1900

Term: 0505 2003 Fall

Term Begin Date: 08/27/2003

Subject Area: ANTHRO Anthropology

Career: UGRD Undergrad

Catalog Nbr: 101

Acad Group: LBART Lib Arts

Course Roll

Class Sections

Customize Find
1-2 of 2 Last

Institution	Career	Term	Session	Academic Group	Class Nbr	Subject	Catalog	Section	Description
PSUNV	UGRD	0505	1	LBART	1023	ANTHRO	101	1	Introduction to Anthropology
PSUNV	UGRD	0505	1	LBART	1321	ANTHRO	101	100	Introduction to Anthropology

Course Roll page

The system displays the course offering information for the term and session in the upper portion of the page, and displays all of the related class sections that have been scheduled for that term and session of the course on each detail line in the Class Sections area.

On the lower portion of the page, compare the Institution, Career, Term, Session, Academic Group, Class Nbr (class number), Subject, Catalog, Sect (section), and Description (course title) values for the scheduled class sections with the values for the related course catalog offering (on the upper part of the page).

If these values are different, click the Course Roll button to synchronize the scheduled class sections with the latest course catalog offering information. The system rolls the course catalog data down to the schedule of classes for each class section that is scheduled for the course during the term and session you specify. The system processes the request and immediately displays the *prospective* changes to the schedule of classes results in the Class Sections area. This is your opportunity to review the results of the roll process. If you are not satisfied with the results, do not save the page. Exit the page, and no update to the schedule of classes occurs. Alternatively, if you are satisfied with the results of the roll process, save the page to confirm and update the schedule of classes.

Note. On the Course Catalog - Offerings page, if you have changed the institution where the course is scheduled and students are already enrolled in the class sections, the system does not process the rolling of the data to the schedule of classes for those class sections.

See Also

[Chapter 6, "Setting Up the Course Catalog," Creating Course Offerings, page 88](#)

Defining Class Associations

This section provides an overview of class associations, lists a prerequisite, and discusses how to:

- Adjust units.
- Modify class components.
- Modify requisites.

Understanding Class Associations

Class association numbers link all class sections that constitute a single offering. With a common association number, you can control not only the sections of classes in which a student must enroll, but you can also control elements of the sections including units, components, and requisites.

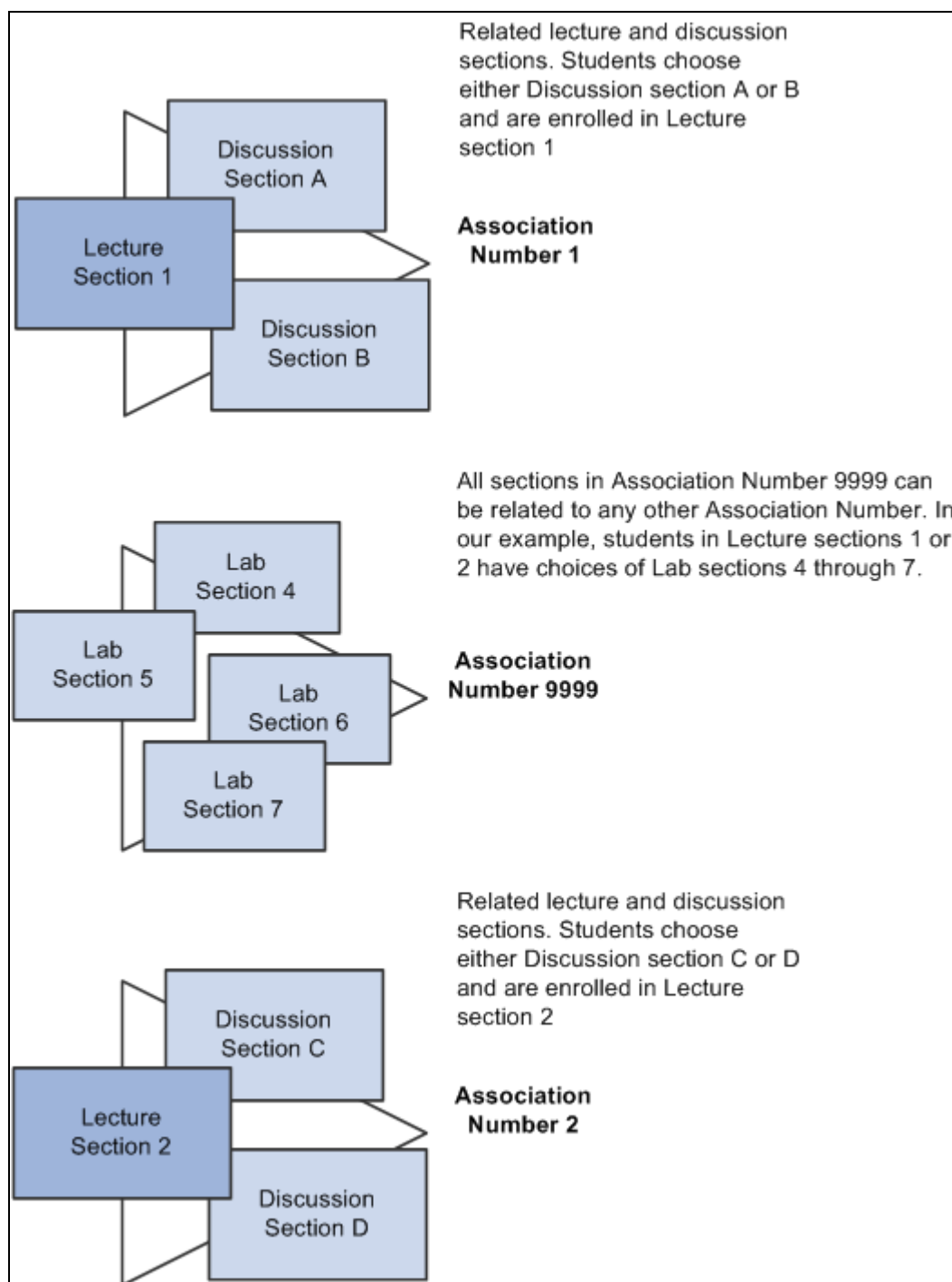
Use the class associations component when you have scheduled classes and an administrative or academic change dictates that you must add or modify class components, or adjust units within associated sections.

Regardless of how many components a course offering has (lecture, lab, discussion), always use a unique class association number to identify it. This includes offerings that have just a single component, such as a lecture. Because each section is in its own group, a student can be enrolled in one section and on the wait list for a second more desirable section.

In addition, if you assign a unique class association number, you can vary the units, requisites, and components of individual sections when you have a single component course.

Warning! If you do not indicate a unique association number for each section of a single component course, students cannot wait list for multiple sections.

A visual representation of the class association concept might look like the following graphic. The course has two lecture sections, four discussion sections, and four lab sections. Student in lecture section 1 can only be in discussion sections A or B, and students in lecture section 2 can only be in discussion sections C or D. All students must enroll in a lab section, but can choose any lab section.



An illustration of the class association number concept

Discussion sections A, B, C, or D are set up with a class type of Enrollment in the Schedule of Classes. Students select to enroll in one of these sections. Lecture sections are set up with a class type of Non-Enrollment and the auto-enroll option selected. Students are automatically enrolled in a lecture section dependent upon the discussion section chosen. Lab sections are set up with association number 9999 because students have an option of enrolling in any of these.

Use the class associations component after you schedule your classes for a term. In this component you can maintain the data of a group of classes which form a single course offering.

The data in the class associations component is created after you schedule classes. Use this component only if you want to override defaults that are set in the course catalog.

Note. After you create the schedule of classes, if you amend the course catalog those changes are not reflected in the schedule of classes. Use the Class Associations component if you must make changes to classes already scheduled, such as adjusting units, modifying components, or modifying requisites. You can also use the Course Roll page to make changes to classes that are already scheduled.

See Also

[Chapter 24, "Managing the Schedule of Classes," Rolling Data from the Course Catalog to the Schedule of Classes, page 578](#)

Prerequisite

You must first schedule the class.

Pages Used to Define Class Associations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Class Associations	CLASS_ASSOC	Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Associations	Adjust units, change instructor edit views, and select the blind grading option after you schedule a class. All data on the page defaults from the Course Catalog component. All of the data elements can be changed for a class association.
Class Components	CLASS_ASSOC_CMPNT	Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Components	Modify aspects of class components such as grading basis, course components, and requirement designations. Display all related sections for the class association. For convenience, the system also displays any class sections with class association 9999.
Class Requisites	CLASS_ASSOC_RQS	Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Requisites	Modify, and, if appropriate, add more requisites to a class.

Adjusting Units

Access the Class Associations page (Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Associations).

Class AssociationsClass ComponentsClass Requisites

Course ID:003280

Academic Institution:PeopleSoft University

Term:2003 Fall

Subject Area:ENGLLIT

Catalog Nbr:120

Session:1

Course Offering Nbr:1

Undergrad

English Literature

Anglo-Saxon Lit

Regular Academic Session

Class Roll

Class AssociationsFind | View AllFirst1 of 1Last

Associated Class:1

Minimum Units:3.00

Academic Progress Units:3.00

Course Count:1.00

Billing Factor:1.000

Tuition Group:

Maximum Units:3.00

FA Units:3.00

Course Contact Hours:36.00

*Instructor Edit:No Choice

☐ Use Blind Grading

Class Associations page

The system creates the record here when you enter and save the schedule of classes. The associated class number links all class sections that constitute a single course offering. For example, all lab and discussion sections plus the associated lecture sessions have the same associated class number. The system populates all of these fields by default from the course catalog.

Note. Association number 9999 can be associated with any other associated class number. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course (such as lecture, lab and discussion) from within the same associated class group (or from group 9999). You can only assign association number 9999 to nongraded components.

Minimum Units and Maximum Units	The system populates the Minimum Units and Maximum Units fields by default from the course catalog. You can override these values.
Academic Progress Units and FA Units (financial aid units)	The system populates these fields by default from the course catalog. You can override these values. The fields are unavailable for entry for variable unit courses.
Course Count	The system populates this field by default from the course catalog. The course count indicates the worth, or count, of the course towards an advising requirement. Some institutions count courses, as well as units, towards degree requirements. You can override this value.

Course Contact Hours

The system populates this field by default from the course catalog. Course contact hours may be used for manual workload analysis. You can override this value, which you initially define on the Catalog Data page. Use this field only if you want to report contact hours manually.

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

See [Chapter 25, "Tracking Instructor Workload," page 623](#).

If you track contact hours manually and therefore use the Course Contact Hours field, the course contact hours should equal the instructor contact hours. If you are overriding the value of the Course Contact Hours field, then to maintain consistency—and therefore increase clarity—you should update the instructor contact hours using the Meetings page. The system itself performs no cross-reference verification to ensure that the corresponding values match.

Billing Factor

The system populates this field to 1 by default. The billing factor regulates billing units, which the system uses to calculate per unit fees. When you establish fees for terms, courses, and classes, you can assess a per unit fee which is derived from the billing units on the student's enrollment record. Billing units are equal to the billing factor times academic progress units ($BU = BF \times APU$). So if billing factor is set to 1 and academic progress units is set to 3, billing units would be 3. Alternatively, if the billing factor is set to 2, and academic progress units is set to 3, billing units would be 6. Because billing factor defaults to 1, billing units are usually equal to academic progress units.

The Student Enrollment 1 page is the only place where you can override billing units for an individual enrollment. The only time that billing units and academic progress units would differ is when the billing factor is set to anything other than 1, or if either of these values were changed on the Student Enrollment 1 page.

Instructor Edit

Select how you want the system to prompt for instructor IDs during class scheduling and enrollment. This option determines the availability of the Instructor ID field during enrollment, for courses for which the student has the option to select the instructor, such as independent study courses. The system populates the value for the Instructor Edit field by default from the Catalog Data page. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Values are:

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

Class Instructor Edit: If you select this option, the system makes the Instructor ID field on the Enrollment Request, Quick Enroll, and Self Service Enrollment pages available and prompts the user with only the Primary Instructors for the class, as defined on the Meetings page.

Use this option for independent study courses or the like, for which the student can select one of several primary instructors.

Instructor/Advisor Edit: If you select this option, the system makes the Instructor ID field available on the Enrollment Request, Quick Enroll, Enrollment and Self Service Enrollment pages. The system prompts the user with only the instructors available to teach this course, as defined on the Instructor/Advisor Table page.

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

The *Instructor/Advisor Edit* option should be used only for courses that belong to academic organizations for which the Instructor Advisor option is selected (on the Academic Organization Table page). This ensures that instructor selection is controlled by the academic organization settings.

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors, page 35.](#)

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Designing Your Academic Structure," Defining Academic Organizations.

Tuition Group

Regardless of the tuition group that you enter on this page, all students are charged tuition based on their own tuition group. Use this field to designate a specific group of students that you want to charge additional course fees for the course.

This field is optional.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Setting Up Fees and Tuition Groups," Setting Up Tuition Groups.

Use Blind Grading

Select this check box to enable grade rosters for blind grading. The system populates this field by default from the Course Catalog - Offerings page.

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

Class Roll

If the class is scheduled and students are enrolled, and you make changes to the fields in the Class Associations component, in most cases this affects student enrollment. You therefore need to update the enrollment records of each student in the class. To do so, click the Class Roll button for all rows on the page. The system creates enrollment maintenance transactions through a COBOL process and displays for you an enroll request ID related to these transactions. We suggest that you write down the enrollment request ID numbers for use on the Block Enrollment page.

The COBOL process considers the following fields when updating student records:

- Minimum Units.
- Academic Progress Units (when minimum and maximum units are the same).
- Financial Aid Units (when minimum and maximum units are the same).
- Course Count (if set to Course Count Enrollment on the Academic Program - Course page).
- Billing Factor.
- Tuition Group.
- Grading Basis.
- Requirement Designation.

Note. To update the students' records, you must navigate to the Block Enrollment page and run the block enrollment process using this enroll request ID. The system uses the enrollment maintenance transactions grouped within this enroll request ID to update the student enrollment records that your changes have affected.

Modifying Class Components

Access the Class Components page (Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Components).

Class Associations		Class Components		Class Requisites	
Course ID:	001031	Course Offering Nbr:	1		
Academic Institution:	PeopleSoft University				
Term:	2010 Spring	Undergrad			
Subject Area:	BIOLOGY	Biology			
Catalog Nbr:	103	General Biochemistry			
Session:	1	Regular Academic Session			

Class Association Components						Find	View All	First	1 of 3	Last
Associated Class:	1									
*Grading Basis:	GRD	Graded								
Graded Component:	Lecture					*Grade Roster Print:	Component			
Requirement Designation:						Primary Component:	LEC			

Class Components							Customize	Find	View All	First	1-3 of 3	Last
*Course Component	Contact	Optional	Workload Hours	*Final Exam	Auto Create							
Discussion		☒		No	☐							
Laboratory		☐		No	☐							
Lecture		☐		Yes	☐							

Class Sections					Customize	Find	View All	First	1-3 of 3	Last
Section	Class Nbr	Component	Class Type	Class Status						
1	3064	Lecture	Enrollment Section	Active						
1L	3067	Laboratory	Non-Enrollment Section	Active						
2L	3068	Laboratory	Non-Enrollment Section	Active						

Class Association 9999					Customize	Find	View All	First	1-3 of 4	Last
Section	Class Nbr	Component	Class Type	Class Status						
1D	3071	Discussion	Non-Enrollment Section	Active						
2D	3072	Discussion	Non-Enrollment Section	Active						
3D	3073	Discussion	Non-Enrollment Section	Active						

Class Components page

The system creates the record here when you enter and save the schedule of classes. The associated class number links all class sections that constitute a single course offering. For example, all lab and discussion sections plus the associated lecture sessions have the same associated class number.

The system populates all of these fields by default from the course catalog.

See [Chapter 6, "Setting Up the Course Catalog," Creating Course Offerings, page 88.](#)

Note. Association number 9999 can be associated with any other associated class number. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course (such as lecture, lab and discussion) from within the same associated class group (or from group 9999). You can only assign association number 9999 to nongraded components.

Grading Basis

The system populates this field by default from the course catalog. Select the grading basis to use for the class. Grading basis values are linked to grading schemes on the Grading Scheme Table page.

Grade Roster Print

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

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

Component: Grade rosters print for the graded component of the class. The graded component is specified on the Course Catalog - Components page.

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

None: No grade roster prints for the class.

Graded Component

The system populates this field by default to the component on the Components page that has the Graded Component check box selected. You can override this value. Select the graded component, indicating the component with which the course grade is associated.

After students enroll in a component within the class association, this field is unavailable for entry.

Requirement Designation

Enter a requirement designation for the class. A requirement designation can be extra work that has to be done for a course, such as Design Credit, or a requirement designation can specify a special type of a course to use in a course list for the Academic Advisement application. Requirement designation values are defined on the Requirement Designation Table page, and default from the Catalog Data page. Example requirement designation values are *Design Credit*, *Thesis Choice*, and so on.

Requirement designations feed into the Academic Advisement application.

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Requirement Designations, page 38.](#)

Primary Component

If you are using the Dynamic Class Dates feature, it is mandatory that you enter a primary component for the class, even if you only have one component. The Dynamic Class Dates process uses the scheduled class section of the primary component to calculate the landmark dates on a dynamic academic calendar. The process uses the primary component value as defined in this field. You can select to include other components of the class in Dynamic Class Dates process calculations on the Schedule of Classes - Basic Data page.

After students enroll in a component within the Class Association, this field is unavailable for entry.

Course Component	Enter a course component for the class association. The system populates this field by default from the Course Catalog - Components page. Values for this field are delivered with your system as translate values. You can modify these values. The course component indicates the parts of the course offering (<i>lecture, laboratory, seminar</i> , and so on). One course offering can have multiple components.
Contact	Enter the contact hours you want to record for the instructors teaching this component of the course. The Instructor Workload feature does <i>not</i> reference this free form field. Use this field only if you want to report contact hours manually.

Note. Modifying the course components and the contact hours for each component creates inconsistency between this page and the Meetings page. Although you can edit the corresponding fields on the Meetings page, with no impact elsewhere in the system, you should, for clarity, maintain consistency between these two pages. The system itself performs no cross-reference verification to ensure that the corresponding values match. Thus, to maintain consistency you should verify that the course component contact hours on this page equal the instructor contact hours on the Meetings page.

Optional	If you select this check box, enrollment in the component is optional for this associated class.
Workload Hrs (workload hours) and OEE Workload Hrs (open entry/exit workload hours)	If you select the Calculate Workload check box on the Academic Institution 4 page, thereby activating the automated Instructor Workload feature, the Workload Hrs field appears on the Class Components page. The Workload Hrs or OEE Workload Hrs field defaults to the workload hours specified on the Course Catalog - Components page. In other words, if you set the lecture to three workload hours on the Course Catalog - Component page, then whenever a lecture for this course is scheduled, the lecture component defaults to three workload hours on the Class Components page. Similarly, if you set the laboratory component to 1 workload hour on the Course Catalog - Components page, then whenever a laboratory for this course is scheduled, the laboratory component defaults to one workload hour on the Class Association - Class Components page. The user can modify the component values on the Class Association - Class Components page if necessary. This field is optional. The workload hours specified here can be used by the default workload hours formula as specified by the Course Component Workload Hours% field on the Academic Institution 4 page.

Final Exam	Enter a value to indicate whether a final exam is given in the course. The value defaults from the Course Catalog - Components page. Final exam values are delivered with your system as translate values. Add as many values to the translate table for the final exam as needed. The only value that you must not remove from the translate table is <i>Yes</i>, which has coding attached to it. Values are: <i>Yes</i>: The <i>Yes</i> value enables block final exam scheduling. <i>No</i>: Indicates that this component has no final exam. Entering <i>No</i> eliminates this component from the block exam scheduling process. <i>Last Class</i>: Indicates that a final exam is taken in the last regularly scheduled class (as opposed to during final examination week). Entering <i>Last Class</i> eliminates this component from the block exam scheduling process.
Class Sections	Displays all related sections for the class association.
Class Association 9999	For convenience, displays any related class section with class association 9999. Note. No class association records are created for 9999 sections.

Modifying Requisites

Access the Class Requisites page (Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Requisites).

Class Associations

Class Components

Class Requisites

Course ID:	003280	Course Offering Nbr:	1
Academic Institution:	PeopleSoft University		
Term:	2003 Fall		Undergrad
Subject Area:	ENGLIT		English Literature
Catalog Nbr:	120		Anglo-Saxon Lit
Session:	1		Regular Academic Session

Catalog Requisite

Requirement Group:	008005	Detail	Literature 120 Prerequisites
Long Description:	Literature 120 requires pre-requisites of either Literature 100 or 102.		

Class Association Requisites

Find | View All First 1 of 1 Last

Associated Class:	1	☒ Also Use Catalog Requisite
Requirement Group:		Detail
Long Description:		

Class Requisites page

- Detail

Click to access the Requirement Group Summary page, where you can review the enrollment requisites for both the course and class.
- Also Use Catalog Requisite

Select to command the system to use the course catalog requisite as well as the class requisite in the enrollment process.

Note. If you have requisites in the course catalog and you do not want to use them for the class offering, clear the Also Use Catalog Requisite check box.
- Requirement Group

Enter the class requisite requirement group. Requirement group values are created through the Enrollment Requirement Group component.
- Long Description

The system populates this field by default to the long description of the enrollment requirement group.

Defining Class Permissions

This section provides an overview of class permissions, lists prerequisites and common elements, and discusses how to:

- Create add permissions for classes.

- Create drop permissions for classes.
- Generate add permissions for a subject area.

Understanding Class Permissions

Class permissions are numbers or authorizations that you can associate with a class and assign to students to use at enrollment time. You can create *general* or *student-specific* add permissions. You can also generate add permission numbers for an entire subject area. You can create only *student-specific* drop permissions.

Class permissions can override conditions such as requisites and limits. Permissions allow a student to add or drop a class, as long as the student uses the permission by the expiration date and does not violate overall student limitation rules (such as maximum number of units).

Prerequisites

Before you can define class permissions, you must:

- Schedule a class.
- Select the Student Specific Permissions check box on the Basic Data page (for student-specific permissions).

This option applies to add permissions only.

- Clear the Student Specific Permissions check box on the Basic Data page (for general class permissions).

This option applies to add permissions only.

Common Elements Used in This Section

Instructor

View class instructor data. Because there can be multiple instructors for a class, name data for each employee ID appears.

Expiration Date

In the Defaults group box, this is the default expire date. You can change this date. When you create permissions for a class, the system populates the Expire Date column with the default date value. The system retrieves the value for the Default Date field from the SESS_TIME_PEROD table or the SESSION_TABLE based on the following criteria:

If the value of the add/drop action for the TIME_PERIOD field on the SESS_TIME_PEROD table is 140 and an end date value exists for this field, the system retrieves this end date value as the default date.

If the end date for the TIME_PERIOD field on the SESS_TIME_PEROD table does not exist, the system retrieves the end date for the term as the default date. The system retrieves this value from the SESSION_TBL_END_DT field on the SESSION_TABLE page.

In the Class Permission Data group box, the expiration date defaults from the date in the Defaults group box. You can change this date.

Sequence Number	The system generates a sequence number and assigns it to each permission based on the order you create the permissions.
Permission Use Date	The system populates this field with a value of <i>Not Used.</i> by default. When the student successfully uses the add or drop permission, this field is populated with the use date.
Comments	Add comments for individual permission rows.

Pages Used to Create Class Permissions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Permission to Add	CLASS_PERMISSION	Records and Enrollment, Term Processing, Class Permissions, Class Permissions, Permission to Add	Create student-specific permissions or general permission numbers for adding classes.
Permission to Drop	CLASS_PERMISSION2	Records and Enrollment, Term Processing, Class Permissions, Class Permissions, Permission to Drop	Create student-specific permission numbers for dropping classes.
Generate Add Permissions	RUNCTL_SRSPRMSN	Records and Enrollment, Term Processing, Class Permissions, Generate Add Permissions, Generate Add Permissions	Generate general add permission numbers for an entire term and subject area. Before you access the Generate Add Permissions page, the Consent field on the Enrollment Cntrl page for all classes within the subject you specify, must be set to <i>Department</i> or <i>Instructor</i> .

Creating Add Permissions for Classes

Access the Permission to Add page (Records and Enrollment, Term Processing, Class Permissions, Class Permissions, Permission to Add).

Permission to Add
Permission to Drop

Course ID: 001239 **Course Offering Nbr:** 1
Academic Institution: PeopleSoft University
Term: 2007 Fall Undergrad
Subject Area: ECON Economics
Catalog Nbr: 140 Macroeconomics

Class Section Data
Find | View All First 1 of 4 Last

Session: 1 Regular Academic Session **Class Nbr:** 2428 **Class Status:** Active
Class Section: 001 **Class Type:** Enrollment Section
Component: Lecture **Instructor:**

☐ Student Specific Permissions

Defaults

Expiration Date: 12/12/2007

Permission Valid For:

Closed Class	Requisites Not Met	Consent Required	Career Restriction	Permission Time Period
☒	☒	☒	☒	☒

Assign More Permissions: ☐ Set All Permissions to Issued

Class Permission Data

Customize | Find | 1-10 of 10 Last

General Info Permission Comments

Seq #	Number	ID		Issued	Issued By	Issued Date	Status	Permission Use Date	Expiration Date	
1	256172	SR13435	Swift,Joshua	☐			Used	06/13/2007	12/12/2007	
2	724509	SR13592	Ochoa,Graciella	☐			Used then Dropped	06/13/2007	12/12/2007	
3	950865	SR13433	Carollan,Sian	☐			Used but Waitlisted	06/13/2007	12/12/2007	

Permission to Add page

Student Specific Permissions The status of this check box defaults from the Basic Data page.

Permission Time Period

Select this check box to allow a student to enroll in the class during the enroll with permission time period. This time period is determined by a user's enrollment security access ID and by the time period end dates that are defined in the Session Time Period table.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Student Records," Setting Up Enrollment Access IDs.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Establishing Terms and Sessions."

The Permission Valid For check boxes are used to specify the conditions that a class permission overrides:

Closed Class	Select to allow students to enroll in a class that is full. This type of permission also allows students to enroll in a closed combined section, or in a class where all available seats are subject to reserve capacity requirements that they might not meet.
Requisites Not Met	Select to allow students to enroll in a class for which they do not meet the prerequisites.
Consent Required	Select to allow students to enroll in a class that requires instructor or department consent to add, as indicated by the Add Consent field on the Enrollment Cntrl page.
Career Restriction	Select to allow students to enroll in a class that is outside their career.
Permission Time Period	Select to allow students to enroll in a class during the enroll with permission time period. This time period is determined by a user's enrollment security access ID and by the time period end dates that are defined in the Session Time Period table.
Assign More Permissions	This field is available only if the Student Specific Permissions check box is not selected. Enter the number of permissions you want to create. When you click Generate, the requested number of rows appear in the Class Permission Data group box.
Set All Permissions to Issued	If you select this check box, all the cleared Issued check boxes in the Class Permission Data group box are selected. The Issued By and Issued Date fields are populated when you save the page.

Class Permission Data

The information that appears in this group box changes, depending on whether you create student-specific or general add permissions.

General Info

Select the General Info (general information) tab.

Number	The value that appears is a random number generated for general class permissions.
ID	For student-specific permissions, enter the ID for which you want to create the permission. For general class permissions, this field is populated with the student's ID when the student successfully uses the add permission. When the permission is used, the field is display only.
Issued	Select this check box to indicate that a general permission has been issued to a student. Select the Set all Permissions to Issued check box to select the check boxes in all rows.

Issued By and Issued Date

If the Issued check box is selected, these fields are populated when you save the page. The system displays the operator's user ID in the Issued By field.

Status

View the status of the permission. Values include:

Used but Wait Listed: Appears when a student is placed on the wait list for a class for which the student has a permission number or student specific permission. The wait list process can therefore use the permission number or student specific permission to allow the student to enroll, without meeting conditions such as requisites.

Used: In the example of a student who is placed on the wait list for a class, this value appears when the student is moved from the wait list and enrolled in the class.

Used then Dropped: Appears when a student uses a permission to add a class and subsequently drops the class.

Permission

Select the Permission tab.

Class Permission Data							
General Info Permission Comments							
Seq #	Number	ID	Closed Class	Requisites Not Met	Consent Required	Career Restriction	Permission Time Period
1	572862	SR0446	☐	☐	☐	☐	☐
2	314828		☒	☒	☒	☒	☒
3	54902		☒	☒	☒	☒	☒

Permission to Add page: Permission tab

The permission conditions, such as Closed Class, default to the values selected in the Defaults group box. You can select different values for each permission row. When the permission is used, the check boxes become unavailable.

Creating Drop Permissions for Classes

Access the Permission to Drop page (Records and Enrollment, Term Processing, Class Permissions, Class Permissions, Permission to Drop).

Permission to Add

Permission to Drop

Course ID: 003276

Course Offering Nbr: 1

Academic Institution: PeopleSoft University

Term: 2007 Fall

Undergrad

Subject Area: ENGLIT

English Literature

Catalog Nbr: 102

Survey of American Literature

Class Section Data

Find | View All First 1 of 1 Last

Session: 1

Regular Academic Session

Class Nbr: 1210

Class Status: Active

Class Section: 1

Class Type: Enrollment Section

Component: Lecture

Instructor:

Defaults

Expiration Date: 12/12/2007

Permission Valid For:

Requisites Not Met	Consent Required	Permission Time Period
☒	☒	☒

Generate

☐ From Student Enrollment
 ☐ From Permission to Add

Class Permission Data

Customize | Find | First 1 of 1 Last

General Info | Permission | Comments

Seq #	ID	Name	Status	Permission Use Date	Expiration Date		
1	SR0446	Benson,Tara	Not Used		12/12/2007		+ -

Permission to Drop page

Drop permissions can be used even if the class does not use add permissions. Drop permissions are always student specific.

You can create drop permissions on a student-specific basis only.

The Permission Valid For check boxes are used to specify the conditions that a class permission overrides:

Requisites Not Met

Select to allow students to drop a class even if it is being used as a corequisite for another class. For example, a student is enrolled in Class A and Class B. Class B requires concurrent enrollment in Class A. If the Requisites Not Met check box is selected, the student can drop Class A without also dropping Class B.

Consent Required

Select to allow students to drop a class where instructor or department consent is required to drop, as indicated by the Drop Consent field on the Enrollment Cntrl page.

Permission Time Period

Select to allow students to drop a class during the drop with permission session time period. This time period is determined by a user's enrollment security access ID and by the time period end dates that are defined in the Session Time Period table.

Note. The drop permission has no impact on the consequence of the drop, for example, drop without penalty. This is still determined by the academic calendar dates.

From Student Enrollment

Click this button, and then click Generate to create drop permissions for students who are enrolled in the class. You receive an error message if no eligible rows exist.

From Permission to Add

Click this button, and then click Generate to create drop permissions for students who have been granted add permissions on the Permission to Add page. You receive an error message if no eligible rows exist. Eligible rows only exist if add permissions were created on a student-specific basis. Rows are generated whether or not the student has enrolled in the class.

Class Permission Data

View and update details and add comments for drop permissions.

General Info

Select the General Info tab.

ID

Enter the ID for which you want to create a drop permission. When the permission is used, the field becomes unavailable for edit.

Status

View the status of the permission. Values are *Used* and *Not Used*.

Permission

Select the Permission tab.

Class Permission Data						
General Info Permission Comments						
Seq #	ID	Requisites Not Met	Consent Required	Permission Time Period		
1	SR0446 	☒	☒	☒		

Permission to Drop page: Permission tab

The permission conditions, such as Requisites Not Met, default to the values selected in the Defaults group box. You can select different values for each permission row. When the permission is used, the check boxes become unavailable.

Generating Add Permissions for a Subject Area

Access the Generate Add Permissions page (Records and Enrollment, Term Processing, Class Permissions, Generate Add Permissions, Generate Add Permissions).

Generate Add Permissions

Run Control ID: class_perm [Report Manager](#) [Process Monitor](#)

'Academic Institution: PSUNV PeopleSoft University

Find View All		First	1 of 1	Last
Academic Group:	LBART	College of Liberal Arts		
'Term:	0570	2006 Fall		
Subject Area:	HISTORY	History		
Percent of Enrollment Capacity:	0.10			
Minimum of Permission Assign:	10			
Commit Frequency:	1			
Permission Expire Date:	12/12/2006			
Permission Valid For:				
Closed Class	Requisites Not Met	Consent Required	Override Career	Permission Time Period
☒	☒	☒	☒	☒

Generate Add Permissions page

Generate add permissions for a subject area for a particular term.

Academic Group Enter the academic group for which you want to generate add permissions. Academic group values are defined on the Academic Group Table page.

Term Enter the term for which you want to generate add permissions. Term values are defined on the Term Table page.

Subject Area Enter the subject area for which you want to generate add permissions. When you run the process based on subject, the system references the Add Consent field on the Enrollment Cntrl page. Subject area values are defined on the Academic Subject Table page.

Percent of Enrollment Capacity Enter the percent of enrollment capacity the system should use to calculate the number of permissions to create. In the example shown in the page above, the system creates general permissions for 10 percent of the enrollment capacity for every class in the College of Liberal Arts for Fall 2006.

Minimum of Permission Assign Enter the minimum number of general permissions that you want the system to assign for each class. In the example shown in the page above, the system would always assign a minimum of 10 permission numbers for each class, regardless of enrollment capacity.

Commit Frequency	Defaults to 1. The lower the commit frequency, the better concurrence of data. Even though a higher commit frequency enables faster processing of the job, the job could conflict with another one. You should leave the commit frequency at 1.
Permission Expire Date	If a student does not use the permission before the expiration date, the student no longer has permission to enroll in the class. The system pulls the value of the Permission Expire Date field from the TERM_TABLE and SESS_TIME_PEROD tables for each section that exists based on the following criteria: If the value of the add/drop action for the TIME_PERIOD field on the SESS_TIME_PEROD table is 140 and an end date value exists for this field, the system retrieves this end date value as the default date. If the end date for the TIME_PERIOD field on the SESS_TIME_PEROD table does not exist, the system retrieves the end date for the term as the Default Date. The system retrieves this value from the TERM_TBL_END_DT field on the TERM_TABLE page.
Permission Valid For	All check boxes default to selected. You can select particular check boxes for each academic group, term, and subject combination.

Creating Combined Sections

This section provides an overview of combined sections and discusses how to:

- Define a combined section ID.
- Link classes to a combined section ID.

Understanding Combined Sections

If you need to offer two or more separate classes as one class offering, you can combine sections. For example, you may have a course that is offered by the Economics Department (ECON 101) that is identical to a course that is offered by the Business School (BUSN 111). Perhaps you want to offer each class every semester (so students can pick and chose when they take the course), but there is only a maximum of 30 students total each semester who request the two classes, so it just is not economical. To offer both courses in the schedule of classes each semester, yet have the courses be taught as a single class (with one professor, one location, one meeting pattern, and so on), you can combine sections. Students who enroll in the Economics department version can use one class number to enroll, and students who enroll in the Business Department's version can use a different class number to enroll. Yet, all of the students participate in a single class environment. In this case, the combined sections share an event ID. If you want to combine classes that have different meeting patterns and/or instructor information, you can select the Skip Meeting Pattern and Instructor Edit check box, thereby disabling the edit and eliminating the propagation of data across the sections. You can combine sections permanently or for a single class occurrence. You can also combine sections within or across subjects. The enrollment and wait list capacities are controlled both at the section level and at the sections combined level.

To create combined sections:

1. Define a combined sections ID on the Combined Sections Table page.
2. Link classes to the combined sections ID and choose a combination type on the Combined Sections page.

Before you combine sections be sure that a facility ID (if one was entered) exists for only one of the classes you are combining.

Pages Used to Create Combined Sections

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Combined Sections Table	SCTN_CMBND_TBL	Curriculum Management, Combined Sections, Combined Sections Table, Combined Sections Table	Create combined section IDs for each term and session at your institution.
Identify Combined Sections	SCTN_CMBND	Curriculum Management, Combined Sections, Identify Combined Sections, Identify Combined Sections	After you create a combined section ID, use this page to link classes to the ID, define the combination type, and indicate whether or not to enforce or skip the meeting pattern and instructor edit. If the edit is disabled (skipped), then meeting pattern and instructor data can be entered on any of the Schedule of Classes components. If the edit is enforced, then after you combine classes, you must perform all updates to the meeting pattern and instructor information through the Schedule Class Meetings - Meetings page. When you edit this information for a combined section, it is automatically propagated to all of the other combined sections within the same combined sections ID. Within the Schedule of Classes and Schedule New Course components, the facility/meeting pattern and instructor information is unavailable for combined sections.

Defining a Combined Section ID

Access the Combined Sections Table page (Curriculum Management, Combined Sections, Combined Sections Table, Combined Sections Table).

Combined Sections Table

Academic Institution:PeopleSoft University

Term:2003 Fall

Session:Regular Academic Session

*Combined Sections ID	*Description	*Short Description		
0002	Statistics-Section 1	Statistics	View Combined Sections	+ -

Combined Sections Table page

- Combined Sections ID

The system generates a combined sections ID, providing a unique identifier for each combined sections record.
- Description and Short Description

Enter a description and a short description for the combined sections ID. We suggest that these names have some descriptive value to the administrator who assigns these IDs to classes. The descriptions are not visible by students.
- View Combined Sections

Click to access the Combined Sections Table page, where you can view classes that are linked to a specific combined section ID.

Linking Classes to a Combined Section ID

Access the Identify Combined Sections page (Curriculum Management, Combined Sections, Identify Combined Sections, Identify Combined Sections).

Identify Combined Sections

Academic Institution: PSUNV PeopleSoft University
Term: 0505 2003 Fall
Session: 1 Regular Academic Session
Combined Sections ID: 0002 Statistics-Section 1
***Combination Type:** Cross Subject

☒ **Permanent Combination**
☐ **Skip Mtg Pattern & Instr Edit**
 Warning: Mtg Pattern & Instr information will not be shared within the combined section.

Combined Capacities			Total
Requested Room Capacity:	30	Enrollment Capacity:	30 0
		Wait List Capacity:	10 0

Combined Sections												Class Description	
*Class Nbr	Subject	Catalog Nbr	Section	Status	Req Room Cap	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Acad Group			
1681	PSYCH	235	1	Open	35	35	0	0	0	LBART	+ -		
1682	STATS	115	1	Open	30	30	0	10	0	LBART	+ -		

Identify Combined Sections page

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

Combination Type

Enter the combination type. You combine sections *Within Subject*, *Cross Subject*, or *Both*. Values for this field are delivered with your system as translate values. There is no programming associated with this field.

Permanent Combination

Select this check box to command the system to roll the combination when you perform the prior term copy process. If you clear this check box, the system assumes that the combination is a temporary arrangement for the current term.

Skip Mtg Pattern & Instr Edit (skip meeting pattern and instructor edit)

Select this check box to combine sections with different meeting patterns and instructor information. In this case, you enter the meeting pattern and instructor information directly in the Schedule of Classes, but the updated data is *not* propagated across the sections. The system considers instructor workload for each of the sections, and does not combine hours. If necessary, instructor workload hours can be adjusted on the Meetings page.

Requested Room Capacity

Enter the requested room capacity for the combined section. The room capacity can be different than the enrollment capacity. The requested room capacity is used with Universal Algorithm's Schedule25 software.

Note. Requested room capacity of combined sections is used for informational purposes only. The system only enforces individual section requested room capacities.

Enrollment Capacity and Wait List Capacity	Enter the enrollment capacity and the wait list capacity for the combined section. The system updates the total as enrollments are processed. The system uses the lower of the individual section and combined section values. The system uses these values to determine the combined section's virtual status. See the Status field description for more information on virtual statuses.
View Combined Sections Table	Click to access the Combined Sections Table page, where you can view or edit the section combined IDs.
Class Number	Enter the class numbers of sections to combine. If the instructor, meeting pattern, session begin and end date, or weeks of instruction are not identical to previously selected class numbers, an error occurs (unless you select the Skip Mtg Ptn & Instr Edit check box). Note. If you combine sections that have class meeting pattern topic IDs assigned to them, the system deletes the topic IDs. This is to prevent possible data integrity problems. Combined sections share meeting pattern information and the sections within the combination may be different courses with their own topic IDs and descriptions. For the same reason, you cannot assign class meeting pattern topic IDs to combined sections. However, you can assign free format topics. See Chapter 24, "Managing the Schedule of Classes," Defining Class Meeting Patterns, page 552. Note. When you remove a class from a combined section, the system deletes all meeting patterns and instructor data from the section that is removed, unless the Skip Meeting Pattern & Instr Edit check box is selected.
Status	The combined section's virtual status appears here. If a class's enrollment status is closed the class's virtual status is closed. If the class's enrollment status is open, the system determines the virtual status by comparing the total number of students enrolled with the combined enrollment capacity. For example, if the combined enrollment capacity was set to 9 and there were 5 students enrolled in PSYCH 235 and 4 in STATS 115 the virtual status would be closed. Thus, when a person conducts a class search, PSYCH 235 and STATS 115 would appear as closed, even though in the schedule of classes (CLASS_TBL) the sections would show statuses of open. The system also displays the combined section's virtual status on the Combined Section Detail page. See Chapter 24, "Managing the Schedule of Classes," Searching for Classes, page 613.

Scheduling Examinations

This section provides an overview of exam scheduling, lists prerequisites, and discusses how to:

- Schedule exams for individual classes.
- Run the Exam Scheduling process.
- Troubleshoot the Exam Scheduling process.

Understanding Exam Scheduling

You can schedule exams on a class-by-class basis or in large blocks. The block exam scheduling process is useful if you want to schedule exams in the same facility as the primary meeting for the class.

To schedule an exam for a single class (in a facility other than the regular class for the primary meeting):

1. Access the Schedule Class Meetings - Exam page.
2. Enter your reservation.

To schedule exams in large blocks:

1. Access the Exam Scheduling page and specify your processing parameters.
2. Run the Exam Scheduling process.

Prerequisites

Before you run the Exam Scheduling process, you must:

- Set the Final Exam field on the Course Catalog - Components page to *Yes*.
- Define exam codes on the Exam Code Table page.

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Exam Codes, page 27](#).

Pages Used to Schedule Exams

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Schedule Class Meetings - Exam	CLASS_EXAM	Curriculum Management, Schedule of Classes, Schedule Class Meetings, Exam	Link exams to one class section at a time and edit facility information.

Page Name	Definition Name	Navigation	Usage
Generate Exam Schedule	RUNCTL_SREXSCHD	Curriculum Management, Schedule of Classes, Generate Exam Schedule, Generate Exam Schedule	Run the Exam Scheduling process to schedule exams in batch, and reserve the regularly scheduled facility.

Scheduling Exams for Individual Classes

To schedule exams by individual section, use the Schedule Class Meetings component.

See Also

Chapter 24, "Managing the Schedule of Classes," Modifying Scheduled Class Meetings, page 573

Running the Exam Scheduling Process

Access the Generate Exam Schedule page (Curriculum Management, Schedule of Classes, Generate Exam Schedule, Generate Exam Schedule).

Generate Exam Schedule

Run Control ID: ps

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PSUNV

PeopleSoft University

*Term:

0518

2004 Spring

Academic Group	Session	Assign to Scheduled Facility
LBART	1	Regular
FA		

Generate Exam Schedule page

- Academic Institution

Enter the academic institution for which you want to schedule exams.
- Term

Enter the term for which you want to schedule exams.
- Academic Group and Session

Enter the academic group and session for which you want to schedule exams. Academic group values are defined on the Academic Group Table page. Session values are defined on the Session Table page.

Assign to Scheduled Facility Select this check box to command the system to assign exams the same facilities in which the class is scheduled for the term. If you clear this check box, exams are scheduled without a facility.

Note. When scheduling exams for class sections with multiple meeting patterns, the Exam Scheduling process assigns final exam codes based on the class meeting pattern entered first on the Meetings page.

Troubleshooting the Exam Scheduling Process

Setup issues that can cause the Exam Scheduling SQR to not schedule exams include the following:

- Exam Code table not set up correctly to correspond with all possible class meeting patterns.
- Exam Code table not set up for the specified term and session.
- Exam Scheduling page must have the correct academic group.
- Exam Scheduling page must have the correct session code.
- Class must be set up on the Class Associations - Class Components page with a Final Exam value of Yes.
- Class meeting patterns are not set up for the class.
- Facility will not be reserved if you run the process where the Assign to Scheduled Facility check box is not selected.
- Facility will not be reserved if you run the process where the Assign to Scheduled Facility check box is selected, but the facility is already in use by another event during the exam time.

Modifying Course Events

This section lists a prerequisite and discusses how to define course events.

Prerequisite

You must first have an event ID record in your system.

Page Used to Modify Course Events

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Class Event Table	COURSE_EVENT	Curriculum Management, Schedule of Classes, Class Event Table, Class Event Table	Review a class section's facility reservations, and modify or delete facility reservations by date.

Defining Class Events

Access the Class Event Table page (Curriculum Management, Schedule of Classes, Class Event Table, Class Event Table).

Class Event Table

Event ID: 000021813
***Description:**
Academic Institution: PeopleSoft University
Event Type: Course

Class Sections

Term	Subject	Catalog Nbr	Section	Class Nbr
0530	CHEM	102	1	1432

Campus Meetings

Facility ID	Building	Room	Day of Week	Start Time	End Time	Contact Minutes	Date	
ANGE102	Angel	102	Monday	9:00AM	9:50AM	50	08/30/2004	-
ANGE102	Angel	102	Wednesday	9:00AM	9:50AM	50	09/01/2004	-
ANGE102	Angel	102	Friday	9:00AM	9:50AM	50	09/03/2004	-
ANGE102	Angel	102	Monday	9:00AM	9:50AM	50	09/06/2004	-
ANGE102	Angel	102	Wednesday	9:00AM	9:50AM	50	09/08/2004	-
ANGE102	Angel	102	Friday	9:00AM	9:50AM	50	09/10/2004	-
ANGE102	Angel	102	Monday	9:00AM	9:50AM	50	09/13/2004	-

Class Event Table page

Description

The description of the course event. This is the course description.

Contact Minutes

Modify contact minutes for individual classes if necessary. The system bases the contact minutes on the start and end time of the course as defined in the Schedule of Classes. Changing contact minutes for a class meeting has no impact on course contact hours or instructor contact hours. If you have a particular class meeting that you would like additional facility time (perhaps a day for group project presentations, where students need additional time to take down their presentation materials at the end of class), you can increment the contact minutes to your desired reservation time. In addition, you can delete a single meeting facility reservation to make the facility available for another event. Click the Save button to edit the facility reservation. If facility checking is active, the system verifies that your requested reservation is valid before saving the request.

Note. If you are using the PeopleSoft facility conflict checking logic, be sure when you are scheduling classes that you indicate a facility for at least one component of a course. The system does not populate the Class Event Table page unless a facility is booked for at least one component of a course. You indicate facilities for course components on the Meetings page.

Viewing Instructor Schedules

This section discusses how to view instructor schedules.

Page Used to View Instructor Schedules

Page Name	Definition Name	Navigation	Usage
Instructor Schedule	INSTR_CLASS	Curriculum Management, Instructor/Advisor Information, Instructor Schedule, Instructor Schedule	Review an instructor's class schedule for a term.

Viewing Instructor Schedules

Access the Instructor Schedule page (Curriculum Management, Instructor/Advisor Information, Instructor Schedule, Instructor Schedule).

Instructor Schedule

ID: SR12124 Naoko Ikeda

Term: 0505 2003 Fall

Instructor Schedule

Instructor Schedule 2

Class Number	Subject	Catalog	Section	Component	Class Title	Start Time	End Time	Meeting Days	Building	Room
1578	SOC	180	2	LEC	World Pop Probs	1:00PM	1:50PM	MWF		
1608	PHILO	270	2	LEC	Philosophy of Mind					

Instructor Schedule page: Instructor Schedule tab

The system displays all class meetings for an instructor within a term.

Instructor Schedule 2 Tab

Select the Instructor Schedule 2 tab.

Instructor Schedule page: Instructor Schedule 2 tab

The system displays additional detail information for all class meetings for an instructor within a term.

Viewing Instructor Schedules Through Self-Service Pages

If your institution has licensed PeopleSoft Campus Self Service, your instructors can view their class schedule and weekly schedules directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Faculty Center"

Viewing Class Facility Usage

This section discusses how to review class facility usage.

Prerequisites

You must first assign events or classes with meeting patterns to a facility.

Page Used to View Class Facility Usage

Page Name	Definition Name	Navigation	Usage
Class Facility Usage	CLASS_MTG_PAT_DSPL	Curriculum Management, Facility and Event Information, Class Facility Usage, Class Facility Usage	Review a summary of events for a term, session, and day within a facility.

Reviewing Class Facility Usage

Access the Class Facility Usage page (Curriculum Management, Facility and Event Information, Class Facility Usage, Class Facility Usage).

Class Facility Usage

SetID: PSUNV
Facility ID: ANGE100 Angel 100 **Room Capacity:** 50
***Term:** 0505 2003 Fall **Facility Type:** Lecture Rm
Session: ***Day of the Week:** Monday [Fetch Class Meetings](#)

Class Sections															
Start Time	End Time	Subject	Catalog	Section	M	Tu	W	Th	F	Sa	Su	Start Date	End Date	Session	Tot Enrl
11:00AM	11:50AM	ENGLIT	100	1	☒	☐	☒	☐	☒	☐	☐	08/27/2003	12/16/2003	1	2
1:00PM	1:50PM	ENGLIT	102	1	☒	☐	☒	☐	☒	☐	☐	08/27/2003	12/16/2003	1	1
2:00PM	2:50PM	ENGLIT	134	1	☒	☐	☒	☐	☒	☐	☐	08/27/2003	12/16/2003	1	0

Class Facility Usage page

Term, Session, and Day of the Week Select a term, session, and day of the week for your facility search.

Fetch Class Meetings Click to retrieve all existing event information for the parameters specified.

Searching for an Available Facility

This sections discusses how to:

- Create facility search criteria.
- View facility search results.

Use the Search for a Facility component to search for available facilities when scheduling classes and non-course events, such as faculty meetings.

To search for an available facility:

1. Access the Facility Search Criteria page, and enter search criteria as detailed as necessary.
2. Click the Fetch Facilities button to retrieve your results.
3. Review your results on the Facility Search Results page.

Pages Used to Search for a Facility

Page Name	Definition Name	Navigation	Usage
Facility Search Criteria	FACILITY_SRCH	Curriculum Management, Facility and Event Information, Search for a Facility, Facility Search Criteria	Initiate your search for an available facility.
Facility Search Results	FACILITY_SRCH_RSLT	Curriculum Management, Facility and Event Information, Search for a Facility, Facility Search Results	Review the results of your search.

Creating Facility Search Criteria

Access the Facility Search Criteria page (Curriculum Management, Facility and Event Information, Search for a Facility, Facility Search Criteria).

Facility Search Criteria | **Facility Search Results**

Academic Institution: PeopleSoft University

Meeting Criteria

*From Date: 11/24/2010 *End Date: 11/24/2010
 *Meeting Start Time: 8:00AM *Meeting End Time: 5:00PM
 M Tu W Th F Sa Su [] [] [x] [] [] [] []

Facility Criteria

Facility Type: LCTR Lecture Room
 *General Assignment: Ignore Fld Room Capacity From: Room Capacity To: 100
 Academic Organization: LIBARTS College of Liberal Arts
 Facility Partition:
 Location Code:
 Building:
 Fetch Facilities

Facility Search Criteria page

Enter the criteria for your meeting in the Meeting Criteria group box. Enter any specific facility requirements you have in the Facility Criteria group box.

Click the Fetch Facilities button to retrieve a list of facilities that match your request.

Viewing Facility Search Results

Access the Facility Search Results page (Curriculum Management, Facility and Event Information, Search for a Facility, Facility Search Results).

Facility Search Criteria

Facility Search Results

Academic Institution: PeopleSoft University

The following facilities match your search criteria. From Date: 11/24/2010, End Date: 11/24/2010, Meeting Start Time: 8:00AM, Meeting End Time: 5:00PM, Day of Week: Wed, Facility Type: LCTR, General Assignment: Ignore Fld, Room Capacity To: 100, Academic Organization: LIBARTS,

Customize Find View All  								
Building	Room	Facility ID	Capacity	Type	Acad Org	Assignment	Partition	Location
Bush	100A	BUSH100A	50	LCTR	LIBARTS	N	01	PSCSHCDA
Bush	100B	BUSH100B	50	LCTR	LIBARTS	N	02	PSCSHCDA

Facility Search Results page

The system lists every facility that matches your criteria. Reserve the room through event scheduling.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Campus Event Planning," Tracking Event Attendance

Searching for Classes

This section provides an overview of class search and lists the pages used to search for classes.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Course Catalog and Schedule," Searching for Classes Using Self-Service Pages

Understanding Class Search

Use the Class Search feature to search or browse for classes within a specific institution and term. The Class Search feature is accessible through the core system and through PeopleSoft Campus Self Service.

Combined Section Statuses in Class Search

When you search for open classes, the system uses a virtual status to determine whether or not a combined section class appears on the Search for Classes - Search Results page. If the class has a virtual status of closed, the class does not appear on the Search for Classes - Search Results page for open classes.

The system calculates a virtual status for combined sections because combined section classes have combined enrollment capacities. A section with an enrollment capacity of 30 would appear in CLASS_TBL as open after only 15 students enroll, but if it is a combined section with a combined enrollment capacity of 30, and both classes have 15 students enrolled—which meets the combined enrollment capacity of 30—the combined section is closed, even though CLASS_TBL shows each section as open. The class search feature knows the combined section is closed because of the virtual status. The system determines the virtual status of the combined section on the Combined Sections page.

The system follows the following rules to determine the virtual status of a combined section class:

- If the enrollment status of a class is closed, the virtual status is closed.
- If the enrollment status of the class is open, the system evaluates whether or not seats are available within the combined section.

If seats are available, the virtual status is open. If no seats are available within the combined section, the virtual status is closed.

Pages Used to Search for Classes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search for Classes	SSR_CLSRCH_ENTRY	Curriculum Management, Schedule of Classes, Class Search, Search for Classes	Search for classes offered during a specific term. Enter search criteria and retrieve your results.
Search for Classes - Search Results	SSR_CLSRCH_RSLT	Click the Search button on the Search for Classes page.	Review all classes that match your search criteria.
Search for Classes - Class Detail	SSR_CLSRCH_DTL	Click a class section on the Search for Classes - Search Results page.	Review detail for a specific class.

Printing the Schedule of Classes Report

Use the Schedule of Classes Report component to print the schedule of classes report for a term.

This section discusses how to:

- Set Schedule of Classes Report parameters.
- Set Schedule of Classes Report options.

Pages Used to Print the Schedule of Classes Report

Page Name	Definition Name	Navigation	Usage
Print Class Schedule	RUNCTL_SRYSCHD	Curriculum Management, Schedule of Classes, Print Class Schedule, Print Class Schedule	Specify reporting parameters for the Schedule of Classes.
Report Options	RUNCTL_SRYSCHD2	Curriculum Management, Schedule of Classes, Print Class Schedule, Report Options	Further specify your Schedule of Classes reporting options.

Setting Schedule of Classes Report Parameters

Access the Print Class Schedule page (Curriculum Management, Schedule of Classes, Print Class Schedule, Print Class Schedule).

Print Class Schedule

Report Options

Run Control ID: 007118
[Report Manager](#)
[Process Monitor](#)

Run

Selection Criteria

Academic Institution:

PSUNV

PeopleSoft University

Term:

0505

2003 Fall

Academic Organization Node:

PSYCHOLOG

Psychology

Session:

1

*Schedule Print:

Yes

*Print Instructor in Schedule:

Yes

Print By Campus:

☐

Campus:

Print By Location:

☐

Location Code:

Class Status

☒ Active
☐ Cancelled

☒ Stop Enrl
☐ Tentative

Print Class Schedule page

Academic Institution

Enter the academic institution for which you want to print the schedule of classes. The system populates the Academic Institution field by default from the User Defaults 1 page. You can change the value. This field is required.

Term	Enter the term for which you want to print the schedule of classes. The system populates the Term field by default from the User Defaults 1 page. You can change the value. This field is required.
Academic Organization Node	Enter the academic organization node for which you want to print the schedule of classes. The report selects all classes whose academic organization (as assigned on the Schedule of Classes - Basic Data page) falls under the academic organization node that you enter here. You can view the hierarchy of academic organizations on the academic organization tree. <i>See PeopleTools PeopleBook: PeopleSoft Tree Manager</i>
Session	Enter the session for which you want to print the schedule of classes. If you do not enter a specific session, the system prints the schedule for the term you specify. Session values are defined on the Session Table page.
Schedule Print	Enter the schedule print value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Values are: <i>Yes:</i> All classes with the Schedule Print check box selected on the Basic Data page appear on the report. <i>No:</i> All classes with the Schedule Print check box cleared on the Basic Data page appear on the report. <i>All:</i> All classes appear on the report, regardless of the Schedule Print check box setting on the Basic Data page.
Print Instructor in Schedule	Enter a value to determine whether the instructor's name appears on the report. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Values are: <i>Yes:</i> All instructors with the Print check box selected on the Meetings page appear on the report. <i>No:</i> All instructors with the Print check box cleared on the Meetings page appear on the report. <i>All:</i> All instructors appear on the report, regardless of the Print check box setting on the Meetings page.
Class Status	Use the Class Status group box indicate what status of classes to print on the schedule of classes. Values are <i>Active</i> , <i>Cancelled</i> , <i>Stop Enrl</i> , and <i>Tentative</i> .
Print By Campus and Campus	Select to print the schedule of classes based on campus rather than by class section number. Select the campus to specify a single campus.
Print By Location and Location Code	Select to print the schedule of classes based on location within campus, rather than by class section number. Select the location code to specify a single location.

Setting Schedule of Classes Report Options

Access the Report Options page (Curriculum Management, Schedule of Classes, Print Class Schedule, Report Options).

Schedule of Classes **Report Options**

Run Control ID: PS [Report Manager](#) [Process Monitor](#) **Run**

Report Options

☐ Print Meeting Pattern/Instr ☒ **Report Only**

☒ Print Meeting Pattern Topic **File Path:**

☒ Print Class Attributes C:\TEMP\

☐ Print Class Notes

☐ Print Global Notes

☐ Print Sections Combined

☐ Print Class Characteristics

☐ Print Class Enrollment Limits

☒ Print Class Nbr for Non-Enroll

☐ Print Requirement Designation

☐ Print Reserve Capacities

Report Options page

Report Options

Set the report options to print the information that you want to display on the schedule of classes report.

Report Only

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

File Path

In addition to sending report output for this process to a file (through setting preferences in the PeopleSoft Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator.

Copying Classes from One Term to Another

This section lists prerequisites and discusses how to:

- Define criteria for the Prior Term Copy process.
- Select options for the Prior Term Copy process.

Use the Prior Term Copy component to copy the schedule of classes from term to term dependent upon criteria you submit and the roll down options you select.

To run the prior term copy process:

1. Access the Prior term Copy page.
2. Define your processing parameters.

Specifically, define the term from which you want to copy data, and define the term to which you want to copy data.

3. Define additional information such as the academic group and subject area that you want to copy (from and to).
4. Access the Prior Term Copy 2 page.
5. Define detailed options that specify the types of classes that you want to copy.
6. Click Run to run this request. PeopleSoft Process Scheduler runs the RUNCTL_SRROLL process at user-defined intervals.

Prerequisites

You must first define your academic institution and terms. In addition, you need to have a schedule of classes created in a prior term.

Pages Used to Copy Classes from Term to Term

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Copy Prior Term's Schedule	RUNCTL_SRROLL	Curriculum Management, Roll Curriculum Data Forward, Copy Prior Term's Schedule, Copy Prior Term's Schedule	Define the criteria for copying the schedule of classes from term to term.
Copy Prior Term's Schedule2	RUNCTL_SRROLL2	Curriculum Management, Roll Curriculum Data Forward, Copy Prior Term's Schedule, Copy Prior Term's Schedule2	Define additional class status and roll options for the process.

Defining Criteria for the Prior Term Copy Process

Access the Copy Prior Term's Schedule page (Curriculum Management, Roll Curriculum Data Forward, Copy Prior Term's Schedule, Copy Prior Term's Schedule).

Copy Prior Term's Schedule

Copy Prior Term's Schedule2

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

Run

'Institution:

PSUNV

PeopleSoft University

'Roll From Term:

0640

2010 Spring

'Roll To Term:

0660

2011 Spring

Find | View All

First 1 of 1 Last

Sequence:

1

Academic Group:

Subject Area:

FREN

French

Catalog Number From:

103

Catalog Number To:

103

Campus:

Session:

Commit Frequency:

1

Copy Prior Term's Schedule page

Academic Institution	Enter the academic institution for which you want to copy a schedule of classes data.
Roll From Term	The term from which you want to copy classes (the source term).
Roll To Term	The term to which you want to copy classes (the target term).
Sequence	The system populates this field to 1 by default, and increments by 1 for each row that you add. This value is for internal processing purposes only.
Academic Group	Enter an academic group for the classes that you want to copy.
Subject Area, Catalog Number From, and Catalog Number To	Enter a subject area for the classes that you want to copy. If you select a subject area, you have the option of specifying a range of catalog numbers. The system does not require you to select a subject area. If you do not select a subject area, the Catalog Number fields are unavailable for entry.
Campus	Enter a campus for the classes that you want to copy. This field is optional.
Session	Enter a session for the classes that you want to copy. This field is optional.
Commit Frequency	The system populates this field to 1 by default. The lower the commit frequency, the better concurrence of data. While the higher the commit frequency enables faster processing of the job, the job could get tied up with another process. You should leave the commit frequency at 1.

Selecting Options for the Prior Term Copy Process

Access the Copy Prior Term's Schedule2 page (Curriculum Management, Roll Curriculum Data Forward, Copy Prior Term's Schedule, Copy Prior Term's Schedule2).

Copy Prior Term's Schedule2

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Institution: PSUNV PeopleSoft University
Roll From Term: 0640 2010 Spring
Roll To Term: 0660 2011 Spring

Find | View All First 1 of 1 Last

Sequence: 1

Class Status

☒ Active ☐ Tentative
☐ Cancelled ☐ Stop Enrl

Roll Options

☒ Use Catalog Component ☒ Roll Meeting Patterns ☒ Roll Reserve Capacities
☒ Roll Combined Sections ☒ Roll Instructors ☒ Roll Class Requisites
☒ Roll Room Characteristics ☒ Roll Class Notes ☒ Roll Class Attributes
☒ Roll Textbook Assignments

Copy Prior Term's Schedule2 page

Class Status

Use the Class Status group box to indicate the status for classes that you want to copy. Values are *Active*, *Cancelled*, *Tentative*, and *Stop Enrl*. Each of these values corresponds to the class status value on the Enrollment Cntrl page.

Roll Options

Specify the type of information that you want to copy by selecting the appropriate roll options.

Use Catalog Component

Select this check box to validate against the course catalog and only roll those sections to the new term that are valid components of the course as defined in the course catalog. If you do not select this check box, the system copies all sections to the new term, regardless of the component designation.

Note. If a dynamic class date rule is associated with a class, you can still use the Prior Term Copy process by selecting the Use Catalog Component check box because the rule rolls from the course catalog. However, in order to calculate deadline dates, you must run the Dynamic Class Dates process within the copy to term.

Roll Combined Sections

Select this check box to roll combined sections that are designated as a permanent combination (on the Combined Sections page) to the new term.

Roll Textbook Assignments

Select this check box to roll textbook assignments. All data is carried forward except Textbook Assignment Status, which is set to Pending.

See [Chapter 24, "Managing the Schedule of Classes," Defining Textbooks for Classes, page 568.](#)

The remaining options are self-evident.

Note. If your institution uses the Instructor Workload feature, you should follow the Prior Term Copy process with the Workload Copy/Update process using the same roll from and roll to terms. This final step ensures that the process creates term workload records for all copied Schedule of Classes data.

Clearing the Resource Queue Table

This section provides an overview of the resource queue table and discusses how to clear the resource queue table.

Understanding the Resource Queue Table

For organizations that schedule classes with facility conflict checking activated, the resource queue table is a useful feature that prevents users from double booking facilities. When a user begins the class scheduling process, the system inserts a row in the resource queue table (via a COBOL program). This row signifies that someone within the organization is currently scheduling facilities. If another user attempts to reserve a facility, the system presents them with a message that resources are currently being allocated to another process and they must wait.

For example, "The resource you are trying to schedule is currently in use. Try your save again. If after 3 attempts you still cannot save, contact your system administrator."

When the scheduling process finishes, the row is removed from the Resource Queue table.

On occasion, system-wide or local client workstation errors may cause the row to remain in the table, thereby preventing the scheduling of classes. The Resource Queue Cleanup page was designed with this in mind. It is a powerful page, to be used by individuals at the system administrator level. The system administrator can click the Unlock Resource button on the Resource Queue Cleanup page, confirm their selection on the secondary page, and free up the resource.

Page Used to Clear the Resource Queue Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Resource Queue Cleanup	RESOURCE_QUEUE	Curriculum Management, Schedule of Classes, Resource Queue Cleanup, Resource Queue Cleanup	Unlock a facility resource.

Clearing the Resource Queue Table

Access the Resource Queue Cleanup page (Curriculum Management, Schedule of Classes, Resource Queue Cleanup, Resource Queue Cleanup).

Unlock Resource Click to unlock the resource.

Chapter 25

Tracking Instructor Workload

This chapter provides an overview of the processes and reports that you can use to track instructor workload and discusses how to:

- View and update workload data.
- Use the workload copy and update process.
- Walk through instructor workload.

See Also

[Chapter 8, "Setting Up Instructor Workload," page 195](#)

Understanding Instructor Workload

Higher-education institutions, particularly community colleges, need to set maximum limits on the workload assigned to the faculty and other individuals. These institutions also need to track and report actual workload assignments. To accommodate these needs, Student Records has a feature called Instructor Workload, which performs full-time equivalency tracking.

The Instructor Workload feature enables you to monitor the instructional and noninstructional workload for selected faculty, instructors, and staff. This feature enables you to define workload limits for groups or individuals. In addition, you can define multiple types of instructional and noninstructional work assignments using different workload standards for each type of assignment. You can have separate workload upper limits for part-time and full-time individuals and can set automated controls that prevent workload assignments beyond those limits.

If you use the Instructor Workload feature, the system automatically updates full-time equivalency workload values when you enter data on the class scheduling pages. You can also use a background process to copy workload data from one term to another, to update term workload records, or to produce a simple report.

Viewing and Updating Term Workload Data

Two primary ways are available to assign workload hours to an individual:

- Assign non-instructional hours (such as advising) on the Term Workload page.

- Assign an instructor to a class on the Meetings page (thereby attaching the class's workload hours to the instructor).

There is a third way of assigning workload to individuals, through the Workload Copy/Update process, where instructor workload assignments are copied in batch from one term to another. The Workload Copy/Update process is described in the next section of this chapter.

Prerequisites

Before you can review and update term workload, you must:

- Define instructor assignment class values for your institution on the Instructor Assignment Class page.
- Set the default instructor assignment class value for your institution on the Academic Institution Table - Academic Institution 4 page.

Pages Used to View and Update Term Workload Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Term Workload	INSTRUCTOR_TERM	Curriculum Management, Instructor/Advisor Information, Instructor Term Workload, Term Workload	Assign instructor values, view previously assigned term data, or manually update values.
Components	CLASS_ASSOC_CMPNT	Curriculum Management, Course Catalog, Course Catalog, Components	Modify aspects of class components, such as grading basis, course components, and requirement designations.
Meetings	CLASS_MTG_PATTERN	• Curriculum Management, Schedule of Classes, Schedule New Course • Curriculum Management, Schedule of Classes, Maintain Schedule of Classes • Curriculum Management, Schedule of Classes, Schedule Class Meetings	Enter or view class specific workload data for instructors. If you assign an individual to a class meeting, and they are not assigned to an instructor assignment class on the Term Workload page for the term, the system uses the default instructor assignment class from the Academic Institution 4 page to create a term workload record.

Viewing and Updating Individual Term Workload Data

Access the Term Workload page (Curriculum Management, Instructor/Advisor Information, Instructor Term Workload, Term Workload).

Term Workload

Dabbs,Constancio ID: SR0405

Workload Definition Find | View All First 1 of 2 Last

Academic Institution: PSUNV PeopleSoft University **Total Term FTE%** + -

Term: 0550 2005 Fall

Instructor Assignment Class: FULL Full-time

Calculate Workload: ☒ **Assigned FTE %:** 120.00

Limit Workload: ☒ **Instructor Multiplier %:** 100

Workload Assignment Job Code

*Description	Subject	Catalog Nbr	Section	Class Nbr	Comb Sects ID	*Assign Type	Work Load	App Load	Assignment FTE %	+ -
Inorg Synthesis and Reactions	CHEM	128	010	1687		Lecture		☒		+ -
Inorg Synthesis and Reactions	CHEM	128	011	1688		Lecture		☒		+ -

Term Workload page: Workload Assignment tab

If you want to view an individual's cumulative term full-time equivalent (FTE) percentage data, add non-course-based assignments (such as advising), or manually override a check box setting, you can reference the Term Workload page to do so.

Note. Multiple views of this page are available by selecting the tabs in the scroll area. Fields common to all views are documented here first.

Academic Institution	Displays the institution to which this Term Workload record is attached. Individuals can have separate records for separate academic institutions.
Term	Use to enter new term workload data, or to review an existing term workload record.
Instructor Assignment Class	When you access this page in Add mode and specify a term, this field displays the appropriate effective-dated setting that you specified on the Academic Institution 4 page. Enter an instructor assignment class value for this individual if different from the default. The Calculate Workload, Limit Workload, Assigned FTE %, and Instructor Multiplier % fields display the default settings from the Instructor Assignment Class page. You can change these settings.
Calculate Workload	Select to activate the Instructor Workload feature for this instructor or advisor in the specified term. This selection determines if the system creates term detail records at all. This selection alone does <i>not</i> control whether the feature produces a limit warning. You must select the Limit Workload check box in conjunction with the Calculate Workload check box for warnings to appear. This check box is selected by default if the Calculate Workload check box on the Instructor Assignment Class page is also selected. You can change this setting on a term-by-term basis.

Limit Workload

Select to activate the workload limit for this instructor or advisor in the specified term. This selection determines if errors and warnings are produced when assignments are made that exceed either the individual's assigned FTE percentage or the academic institution warning limits. This selection is available only if the Calculate Workload check box is selected. This check box is selected by default if the Limit Workload check box on the Instructor Assignment Class page is also selected. You can change this setting on a term-by-term basis.

Assigned FTE %(assigned full-time equivalency percentage)

Enter the assigned FTE percentage to indicate the percentage of the institution-wide standard (also known as the 100% Weekly Workload Hours field value on the Assignment Type page) to assign to this individual. By default, the system uses this field to display the same value as that set in the Assigned FTE% field on the Instructor Assignment Class page, but you can change it. For example, a value of *100.00* enables you to assign weekly workload hours to this instructor up to a total term FTE percent of 100. If you want to hold this instructor to only 80 percent of the institution-wide standard, then set the value to *80.00*. If you often overbook this instructor (perhaps only to ultimately drop the instructor from an assignment at the beginning of the term), then you could set this value to *120.00*. Total term FTE percent for an individual can never exceed the value specified in this field. You can change this setting on a term-by-term basis.

Instructor Multiplier %

Enter the instructor multiplier percentage to associate with this individual. By default, this field displays the same value as that set on the Instructor Assignment Class page and contributes to the default workload hours formula for courses assigned on the Meetings page. In most instances, you will probably set this field value to *100*. However, if you want to give a certain instructor double credit for the courses to which they are assigned, set this field value to *200* for the term. If you want students to receive only half credit for their course assignments, set this field value to *50*. In addition, you can always assign the instructor to a different instructor assignment class where this field is set to a default value of *50*. This multiplier does not apply to noncourse-based assignments made directly to the Term Workload page. You can change this setting on a term-by-term basis.

Total Term FTE % (total term full-time equivalency percentage)

Total term FTE percentage represents an individual's actual term assignment percentage.

This number is the result of the assignment percentage calculation and decreases or increases automatically as you add, delete, or modify various assignments.

Description

This field has three uses: to enter assignment descriptions manually when new rows are inserted, to view a course title that is derived from assignments made on the Meetings page, or to view a combined section header description when a combined section is assigned to an instructor.

Note. You cannot add, delete, or modify assignments made on the Meetings page.

Subject	Displays the academic subject for the course assigned (if applicable). A subject area is derived from the Course Catalog - Offerings page.
Catalog Nbr (catalog number)	Displays the value associated with this class number, if applicable. A catalog number is derived from the Course Catalog - Offerings page.
Sect (section)	Displays the value associated with this class. Section is derived from the Schedule of Classes - Basic Data page.
Class Nbr (class number)	Displays the autogenerated value associated with the course assigned, if applicable. The class number is derived from the Meetings page.

Workload Assignment Tab

See the previous exhibit for a view of this tab.

Comb Sects ID (combined sections ID)	A combined sections ID appears only when those courses assigned to an instructor comprise combined sections. The combined sections value is created on the Sections Combined Table page. The combined ID description is visible in the table on the Term Workload page, except when the Skip Meeting Pattern & Instructor Edit is selected on the Combined Sections page. In this case, the system considers instructor workload for each of the sections and does not combine hours. If necessary, you can adjust instructor workload hours on the Schedule of Classes - Meetings page. See Chapter 24, "Managing the Schedule of Classes," Creating Combined Sections, page 600.
Assign Type (assignment type)	Use this field in one of two ways. Use it to enter assignment types manually when you insert new rows, or use it to view an assignment type that is derived from assignments made on the Meetings page. All assignment types that are effective as of the term begin date are available.
Work Load	Displays the actual workload hours. Use this field to enter workload hours manually when you insert new rows, or use it to view workload hours derived from assignments made on the Meetings page.
App Load (apply load)	This check box determines whether the assignment counts toward an individual's overall assigned full-time equivalency percentage. The App Load check box setting corresponds to the Include Assignment in Workload check box setting on the related Schedule of Classes component and cannot be changed. For manually entered assignments, it can be changed.

Assignment FTE %
(assignment full-time
equivalency percentage)

The assignment FTE percentage represents the particular assignment's weight based on the 100 percent weekly workload hours value (or the 100 percent OEE weekly workload hours value) for the assignment type. For example, if the 100% Weekly Workload Hours field is set to 15 on the Assignment Type page, and you assign an instructor to teach a 3-hour lecture component with the same assignment type, the assignment FTE percent equals 20 (because 3 hours out of 15 makes 20 percent). The system calculates this number and the user can not modify it.

Job Code Tab

Select the Job Code tab.

Term Workload

Dabbs, Constanancio ID: SR0405

Workload Definition Find | View All First 1 of 2 Last

Academic Institution: PSUNV PeopleSoft University **Total Term FTE%** [+] [-]

Term: 0550 2005 Fall

Instructor Assignment Class: FULL Full-time

Calculate Workload: ☒ **Assigned FTE %:** 120.00

Limit Workload: ☒ **Instructor Multiplier %:** 100

Workload Assignment **Job Code**

*Description	Subject	Catalog Nbr	Section	Class Nbr	Session	Empl Rcd#	Job Code	[+]	[-]
Inorg Synthesis and Reactions	CHEM	128	010	1687	Regular Academic Session	0		[+]	[-]
Inorg Synthesis and Reactions	CHEM	128	011	1688	Regular Academic Session	0		[+]	[-]

Term Workload page: Job Code tab

Session

Displays the session name (if applicable) and is derived from the Meetings page. Sessions are a simple way to divide a term into multiple periods for offering courses.

Empl Rcd# (employee record number)

Relates job information to instructors for reporting purposes. The system displays a warning message if the FULL_PART_TIME value on the job does not coincide with that same field value on the instructor assignment class record related to the instructor assignment class on the Term Workload page.

Job Code

Displays the value specified on the Accommodations page for a particular employee record.

Viewing and Updating Workload Values on the Meetings Page

Use the Instructors For Meeting Pattern group box on the Meetings page to enter or view workload data for instructors.

See Also

Chapter 24, "Managing the Schedule of Classes," Defining Class Meeting Patterns, page 552

Using the Workload Copy/Update Process

The Workload Copy/Update process generates a report that classifies instructors who fall into one of the following six categories:

1. Reporting full-time instructors with workload over the allowed assignment.
2. Reporting part-time instructors with workload over allowed assignment.
3. Reporting full-time instructors with workload over the warning limit.
4. Reporting part-time instructors with workload over the warning limit.
5. Reporting full-time instructors with workload under the allowed assignment.
6. Reporting part-time instructors with workload under the allowed assignment.

If you run the process with the Report Only check box selected, the process does not update any term workload values. It just produces a report for the target term.

If you run the process with the Report Only check box cleared, all schedule of classes data from one term rolls over to another term. However, the Term Copy process alone does not roll forward term workload values. Instead, you must run the Workload Copy/Update process immediately following the Term Copy process to finish the task. This final step ensures that the process creates term workload records for all copied schedule of classes data.

Prerequisites

Term workload records must exist for the Roll From term.

Page Used to Report and Update Workload Values

Page Name	Definition Name	Navigation	Usage
Workload Copy/Update	RUNCTL_WORKLD	Curriculum Management, Roll Curriculum Data Forward, Copy/Update Workload Process, Workload Copy/Update	Enter report and process parameters.

Reporting and Updating Workload Values

Access the Workload Copy/Update page (Curriculum Management, Roll Curriculum Data Forward, Copy/Update Workload Process, Workload Copy/Update).

Workload Copy/Update

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Academic Institution: PeopleSoft University

Report Only: ☐

Roll From Term: 2003 Fall

Roll To Term: 2004 Fall

Copy Non-Course Assignments: ☐

Run Process for ID Range

Begin with ID:

End with ID:

Workload Copy/Update page

Academic Institution The institution for which you are running the process. Academic institution values are defined on the Academic Institution Table page. This field is required.

Report Only Select to report on instructor workload and not update any values.

Report Term

Use to specify the term for which you want to report. When you select the Report Only check box, the Report Term field appears and all other fields disappear.

When you do not select the Report Only check box, the process updates or creates term workload values, or it does both.

Roll From Term

Select the term to reference as the original or source term. This should match the Roll From Term field value on the Term Copy page for the Term Copy process that you run immediately prior to the Workload Copy/Update process. When this field appears, it is required.

Roll To Term

Select the term to reference as the new or target term. This should match the Roll To Term field value on the Term Copy page for the Term Copy process that you run immediately prior to the Workload Copy/Update process. When this field appears, it is required.

For example, if your institution uses both the Term Copy and Instructor Workload features, you run the Term Copy process from term X to term Y. Then you run the Workload Copy/Update process from the same term X to the same term Y. At the conclusion of this process, you can view the report to identify any individuals who might need manual adjustments.

In addition, you can run the Workload Copy/Update process both from and to the same term if needed. For example, you might originally run the Workload Copy/Update process from term X to term Y. Then, at a later date, you determine that you need to adjust some setup values that relate to the Instructor Workload feature for term Y (for example, assignment type, instructor class, or number of weeks in term or session.) You can change this data wherever necessary and then rerun the Workload Copy/Update process from term Y to term Y. This recalculates your term Y values (assignment FTE percent totals) with the newly adjusted setup values. As always, you have a newly generated report to view.

Note. The process of creating or updating To Term records references effective-dated information as of the report date (current date).

In addition, the assignment FTE percent values are not copied but are dynamically calculated according to the To Term parameters.

See [Chapter 24, "Managing the Schedule of Classes," Copying Classes from One Term to Another, page 617.](#)

Copy Non-Course Assignments

Select to include assignments made directly to the Term Workload page for the specified Roll From Term field value.

Note. Should you need to run the Update Workload process more than once with the same value in the Roll to Term field, be aware of the Copy Non-Course Assignments check box and its usage. If left selected each time that the process is run to the same term, non-course-based assignments are copied. For example, if you run the Update Workload process from fall 1999 to fall 2000, and in fall 1999, instructor A was assigned, on the Term Workload page, to advise the math club for 3 hours and, on the Schedule of Classes - Meetings page, to teach Math 100 for 3 hours, then both the 3-hour non-course advising assignment and the Math 100 course assignment correctly roll forward to fall 2000 as 3 workload hours each. However, if you run the Update Workload process a second time from fall 1999 to fall 2000 (with the Copy Non-Course Assignments check box still selected), you add another 3-hour advising assignment to the individual's term workload record. This gives the individual a total of two advising assignments and one class assignment for a total of 9 workload hours. To prevent this type of noncourse assignment copying, during any postprimary runs of the process, clear the Copy Non-Course Assignments check box.

Begin with ID and End with ID

To identify a subset of individuals to process, you might want to specify begin-with-ID and end-with-ID parameters. Both of these fields are optional. These fields are not available when you select the Report Only check box. The report always displays all applicable IDs (which might include more than the range of IDs processed).

Walking Through Instructor Workload

Now that you have familiarized yourself with all of the setup pages, walk through the following simple scenarios to help you visualize how everything is integrated. If possible, actually perform this walk through in a sample or test database. The exercise begins with references to the setup table located in the Implementing Instructor Workload Setup Tables section of this PeopleBook.

Warning! Although the conclusion of this exercise includes data clean up, there is one Term Workload record that you cannot delete. If you do not have access to a sample or test database, then use the steps below as a reference when you finally implement the feature. Do not perform this walk through in your production database.

To track instructor workload:

Define Assignment Types

First, create assignment types for at least two types of assignments. You will begin with lecture and advising.

1. Select Curriculum Management, Instructor/Advisor Information, Assignment Type, Add a New Value.
2. Enter an Assignment Type of *LEC* and then the code for your institution.
3. Click Add.
4. Enter the following effective date: *01/01/1900*.
5. Enter the following status: *Active*.
6. Enter the following description: *Lecture Assignment Type*.

7. Enter the following short description: *Lecture*.

This description appears in the grid on the Meetings and Term Workload pages.

8. Select the View on Schedule of Classes check box.

This causes the assignment type to be an available choice on all of the Meetings pages.

9. Select the Include Assignment in Workload check box.

10. Enter 9 in the 100% Weekly Workload Hours field.

This causes a 3-hour assignment to be converted to 30 percent of an individual's term workload, or, this causes a 9-hour assignment to be converted to 100 percent of an individual's term workload.

11. Enter 0 in the 100% OEE Workload Hours field.

12. Save.

13. Select Curriculum Management, Instructor/Advisor Information, Assignment Type, Add a New Value.

14. Enter an assignment type of *ADV*, and then the code for your institution.

15. Click Add.

16. Enter the following effective date: *01/01/1900*.

17. Enter the following status: *Active*.

18. Enter the following description: *Advising Assignment Type*.

19. Enter the following short description: *Advising*.

This appears in the grid *only* on the Term Workload page because you will set the next field to *OFF*.)

20. Clear the View on Schedule of Classes check box.

This ensures that an assignment type of *ADV* can never be assigned on the Meetings page. Instead, you want to reserve this assignment type for association with assignments made directly on the Term Workload page.

21. Select the Include Assignment in Workload check box.

22. Enter 9 in the 100% Weekly Workload Hours field.

This value means that if you want to give an instructor one course credit for advising, then give them 3 workload hours (or whatever the institution common course count is) for advising in a given term.

23. Enter 0 in the 100% OEE Workload Hours field.

24. Save.

Define Instructor Assignment Classes

To create instructor assignment class values and their corresponding defaults for two types of employees (beginning with full time and part time):

1. Select Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Add a New Value.
2. Enter an Instructor Assignment Class of *FT*, and then the code for your institution.
3. Click Add.
4. Enter the following effective date: *01/01/1900*.
5. Enter the following status: *Active*.
6. Enter the following description: *Full-Time*.
7. Select *Full Time* in the Full/Part Time field.
8. Select the Calculate Workload check box.
9. Select the Limit Workload check box.
10. Enter *120.00* in the Assigned FTE % field.
11. Enter *100* in the Instructor Multiplier field.
12. Save.
13. Select Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Add a New Value.
14. Enter an Instructor Assignment Class of *PT*, and then the code for your institution.
15. Click Add.
16. Enter the following effective date: *01/01/1900*.
17. Enter the following status: *Active*.
18. Enter the following description: *Part-Time*.
19. Select *Part Time* in the Full/Part Time field.
20. Select the Calculate Workload check box.
21. Select the Limit Workload check box.
22. Enter *60.00* in the Assigned FTE % field.
23. Enter *100* in the Instructor Multiplier field.
24. Save.

Activate Workload Feature and Specify Defaults

To activate the workload feature for your institution:

1. Select Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table.
2. Specify your institution, select Correct History, and select Search.
3. Insert an effective-dated row with today's date.

4. Select the Academic Institution 4 tab.
5. Select the Calculate Workload check box.
6. Enter *100.00* in the Full-Time Warning Limit % field.
7. Enter *50.00* in the Part-Time Warning Limit % field.
8. Enter *100* in the Course Component Workload Hours% field.
9. Leave the Academic Progress Units % field blank.
10. Enter *120.00* in the Full-Time Assigned FTE % field.
11. Enter *60.00* in the Part-Time Assigned FTE % field.
12. Enter the following assignment type: *LEC*.
13. Enter the following instructor class: *FT*.
14. Save.

Define Academic Subject Component Percentages

Normally, you must enter only component percentages for academic subjects at your institution that you would like multiplied as other than 100. However, just to familiarize you with the page, update the subject of *MATH* with a lecture value of 100.

To define academic subject component percentages:

1. Select Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table.
2. Specify your academic institution and a subject area of *MATH*; select Correct History and then select Search.
3. Select the Subject/Workload tab.
4. Enter the following course component: *Lecture*.
5. Enter the following component multiplier: *100*.
6. Save.

Define Course Catalog Workload Hours Information

To specify workload hours for a course:

1. Select Curriculum Management, Course Catalog, Course Catalog.
2. Specify your academic institution and a subject area of *MATH* if possible, select Correct History, and select Search.
3. Select a course from the search results.
4. Select the Components tab.

5. Verify that a component of *lecture* exists and has a workload hours value of 3. If not, update appropriately and Save.

Note any changes that you make to this course for cleanup later.

6. Note the following data:

- Course ID _____.
- Course Component _____.

7. View Class Component Workload Hours Information.

8. Make sure that you have the course scheduled and that you have specified values correctly in the Workload Hrs (workload hours) field on the Class Components page.

9. Select Curriculum Management, Schedule of Classes, Adjust Class Associations.

10. Specify your academic institution, a future, or current term (if you are using a PeopleSoft sample data database, enter *0460*), and the Course ID noted above.

11. Select Correct History and then select Search.

12. Select the Class Components tab.

13. Note the following data for the component:

- Term _____.
- Associated Class Nbr _____.

14. Verify that the lecture component exist, and that the corresponding workload hours read.

With regularly scheduled classes, this defaults from the catalog. If this is not a newly scheduled class, enter a value of 3 in the Workload Hours field.

15. Save the page.

16. Now take a look at another place that you can go to view or update Workload Hours data.

Use the following optional menu path after a component has been scheduled for a term but later needs to be accessed for review or minor updates. The performance opening these pages is ideal because only the meeting that you need for viewing or updating is loaded.

17. Select Curriculum Management, Schedule of Classes, Schedule New Class, Meetings.

18. Enter your institution, term, and course ID.

19. Click Search.

20. Notice that this component is much smaller than that of the regular schedule of classes (only three pages).

Because you are loading less data, the pages open more quickly. Note that on this page, you can make changes to the workload hours for the meeting and the assignments themselves.

21. Do not make any additional changes.

Define an Individual's Term Workload Information

To define an individual's term workload information:

1. Select Curriculum Management, Instructor/Advisor Information, Instructor Term Workload.
2. Enter an ID (*Instructor A*) and code for your institution.
3. Click Search.
4. Note the following data: ID_____.
5. Insert a row for the same term that you used previously for the class component.
6. Change the instructor assignment class to *PT* from Academic Institution Page 4 default of *FT* and exit the field.

Notice that all of the PT defaults autopopulate the check boxes and Assigned FTE % (assigned full-time equivalency percent) field. This is to show you how the check boxes and fields populate their default values. Now set your Instructor Assignment Class back to *FT*.

7. Select the Calculate Workload check box.
8. Accept the default of selected in the Limit Workload check box from the Instructor Assignment Class page.
9. Change the value in the Assigned FTE % field to *100.00*.

This ensures that you never assign the instructor to more than 100 percent of the full-time standard workload (9 workload hours in this example). If you wanted some slack, for give and take during scheduling, leave this at *120.00*, or even increase it.

10. Change the value in the Instructor Multiplier field to *200*.

Note that this does not double count assignments made directly to the Term Workload page.

11. Save.

Do *not* exit the page.

12. Assign Noncourse Based Assignments.
13. Manually assign a noncourse assignment of Advising to the previous ID (*Instructor A*).
14. Place cursor in Description field on the Workload Assignment tab and type "Advising the Math Club."
15. Enter the following assignment type: *Advising*.
16. Enter the following workload: *3*.
17. Save.

18. Notice that the Assignment FTE % (assignment full-time equivalency percent) field on the Workload Assignment tab autogenerates a percentage value of 33.33 percent.

This is using the formula for instructor assignments made directly to the Term Workload page. Remember, our 100 percent weekly workload hours for this assignment type are 9; therefore, 3 workload hours make up 33.33 percent of the instructor's total term FTE. Also notice that this value contributes to the overall Total Term FTE percent value for instructor A. Exit this page for now. You will return to it later.

Assign Course Based Assignments

To assign instructor A to a course using the Schedule of Classes - Meetings page:

1. Select Curriculum Management, Schedule of Classes, Maintain Schedule of Classes.
2. Enter the same term and course ID that you used in the steps above.
3. Click Search.
4. Select the Meetings tab.
5. On the Meetings - Assignment page, enter the ID for instructor A in the ID field, and exit the field.
6. Select the Workload tab.
7. Look at the Assignment Type field and notice that you do *not* see *ADV* as a choice. (because when setting up *ADV* as an assignment type, you cleared the view on Schedule of Classes check box).
8. Set the assignment type to *Lecture*.
9. Notice that workload hours read 6.

This is because you set the instructor multiplier to 200 percent, so every 3-hour assignment in this term counts as double workload hours. The 3 becomes a 6.

10. Notice that the Assignment FTE % (assignment full-time equivalency percent) field populates and represents that this course is worth double.
11. Save.

View an Instructor's Term Workload Summary

To return to Term Workload page to view instructor A's new workload information.

1. Select Curriculum Management, Instructor/Advisor Information, Instructor Term Workload.
2. Enter same ID for instructor A and code for your institution, and click Search.
3. Scroll to the term you used in steps above.
4. Looking at the page, you can now see both assignments: one made on the Term Workload page and another made on the Meetings page.

Notice that the course assigned on the Meetings page is actually counting double toward FTE. This is because you set the default Instructor Multiplier for this instructor to 200 percent.

Assign Workload for One Class Component to Two Instructors

To allow two instructors to share the responsibility of teaching the math class:

1. Return to the math class on the Schedule of Classes - Meetings page to update the assignments.
2. Select Curriculum Management, Schedule of Classes, Maintain Schedule of Classes.
3. Enter the same term, subject, and course you used in the previous steps, and click Search.
4. Select the Meetings tab.
5. Go to the Instructors For Meeting Pattern group box, select the Workload tab, and change the existing load factor for instructor A from *100.00* to *50.0*.

Notice changes in workload hours and assignment FTE percent.

6. Insert another row on the Workload tab and add another instructor.

You will refer to this second instructor as *Instructor B*. Alter instructor B's load factor to *50*. Remember, it is the user's responsibility to set load factor, and it is also the user's responsibility to ensure that the combined load factor for a course component equals 100, if that is what you want. In some rare instances, you might want them to equal more than 100, but this is not recommended.

Therefore, in looking at the grid, you have now specified that instructor A shall teach 50 percent of the class, and instructor B shall teach the other 50 percent.

7. Save.

View an Instructor's Updated Term Workload Summary

Now return to the Term Workload page for instructor A. Because you have altered the instructor's load factor to 50 percent for the math course, you should notice an overall decrease in the total term FTE percent.

To view an instructor's updated term workload summary:

1. Select Curriculum Management, Instructor/Advisor Information, Instructor Term Workload.
2. Enter an ID for instructor A and a code for your institution, and click Search.
3. Scroll to the term that you used in the previous steps.
4. Notice that updates made to the Meetings page automatically update the Term Workload record.

In addition, notice on this page that you cannot edit anything created on the Meetings page. If you want to change anything associated with an assignment made on the Meetings page, you must return to the Meetings page and make the change. The only assignments that you can modify on the Term Workload page are the non-course-based assignments.

5. Do not cancel the page.

Review Warning Limits

On the Term Workload Page, let us try some of the soft and hard warnings that you created. You set up institution-wide soft warning limits and some default FTE percentage hard warning and error limits on the Academic Institution 4 page. Keep the Term Workload page open and open the Academic Institution 4 page in a new window to review your earlier work.

To test the warnings that you set up:

1. Select Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table.
2. Specify your institution, select Correct History, and select Search.
3. Select the Academic Institution 4 tab.
4. Verify the following values in the listed fields:
5. Select the Academic Institution 4 tab.

The page should have the following values in the listed fields:

- Institution Wide *Soft* Warnings (which apply to all individuals where their Term Workload page has the Calculate Workload check box selected): Full-Time Warning Limit %: *100.00*; Part-Time Warning Limit %: *50.00*.
- Default FTE % Values/*Hard* Warnings (which serve as defaults on the Instr Assign Class page): Full-Time Assigned FTE %: *120.00*; Part-Time Assigned FTE %: *60.00*.

You can change these each time that you create a new Instructor Assignment Class. However, in order to minimize this type of change, pay special attention to the values that you enter. Try to make them as accurate as possible so that you can take full advantage of the data entry benefit this default provides

6. Look back at instructor A's Term Workload record.

Notice that the instructor already has an assigned FTE percent value for the term. Because of this, the default full-time assigned FTE percent value on the Academic Institution 4 page can *not* be used because instructor A does not need to rely on default FTE percent values for this term. Instead, instructor A has an assigned FTE percent value of *100*. This means that instructor A can never be assigned to more than 100 percent of the full-time standard (set up as 9 hours on the Assignment Type page for both *ADV* and *LEC*).

Test the Workload Limits

Close the Academic Institution 4 page, leaving just the Term Workload page open.

To test workload limits:

1. In the same term that you have been using, manually assign instructor A to a second advising assignment worth 4 workload hours.

This takes instructor A over the assigned FTE percent of *100* (or 9 hours in this example). Exit the workload hours field, attempt to save the page, and notice the hard warning or error that appears.

2. If you want to override this and save the assignment, you must increase the assigned FTE percent.

Set the percentage to 120, and try the assignment again. On second attempt, you should receive only institution soft warnings.

3. Save the page.
4. Before you move on to the next test, delete the second advising row that you just inserted, and set the assigned FTE percent to 110.

Instructor A should now have two rows on the Term Workload page for this term: one for advising the Math Club and another for the math course. The total term FTE percent should be 66.66 percent.

5. Save.

Limits Elicited by Using the Meetings Page

Select Curriculum Management, Schedule of Classes, Maintain Schedule of Classes.

1. Enter the same term, subject, and course that you used in the previous steps, and click Search.
2. Select the Meetings tab.
3. On the Meetings page Workload tab, go to the row in the grid for instructor A and manually enter a workload hour value of 6.5 for this math course, exit the field, and try to save.

You should get a soft warning that this creates a workload over the institution-wide preference, but you can save because you are not exceeding instructor A's individual assigned FTE percentage for the term.

4. Save but do not exit the page.
5. Return to the workload field and change the 6.5 to 7, exit the field, and try to save.

Notice that you get the hard warning and error that this exceeds instructor A's allowable assignment FTE percentage. The system does not permit you to save. The only way to override this and continue would be to navigate back to the Term Workload page for this individual and increase his or her assigned FTE percentage for the term.

6. Exit the page without saving.

Limits Viewed by Using the Workload Copy Report

Running the Workload Copy/Update process disregards error and warning limits so that the overall process runs successfully and completely. However, there is a follow-up report that tells you which individuals were assigned and whether either their individual assigned FTE percentages or institution-wide warning limits were exceeded.

Because you know that, in the previous example, instructor A has a total term FTE percentage in excess of the institution-wide warning standard, let's run the report and see how this instructor appears on the report.

1. Select Curriculum Management, Roll Curriculum Data Forward, Workload Copy/Update.
2. Enter a run control.
Select Add a New value.
3. Select the Report Only check box and enter the term that you have been using.
4. Save.
5. Click the Run button, select your process scheduler parameters, and click the OK button.

6. Allow the process to complete, then click the Report Manager link.
7. Enter a process type of *SQR Report*, then click the Refresh button.

The Workload Copy and Recalc (workload copy and recalculate) report should appear in the report list.

8. Click the View link to view the report.
9. Select the SRWRKLD.PDF file to view the report.

In viewing the report, you can see that the instructor A appears under the Reporting Full-Time Instructors with Workload over Warning Limit (100 percent) heading.

At this point, you wonder why you have sections entitled Reporting Instructors with Workload over Allowed Assignment.

If there is a hard warning in the system, how could individuals ever get in this predicament? Remember what happens when you run the Workload Copy/Update process from one term to another. The process can assign workload that exceeds limits if setup values differ between terms. This is why it is imperative that you always view this report after you run the Workload Copy/Update process. If you find that any individuals have exceeded their assigned FTE percentages for the term, you can easily identify them and modify their term workload records. You can also make adjustments on the Meetings page.

10. Because you will not run the Workload Copy/Update process at this time, close the report and exit the Update Workload page.

Walk Through Cleanup

Even though you are now in a test database, before you complete this exercise, you might want to clean up all of the data that you have just entered. To do so, follow these steps:

1. Remove Instructors A and B From the Math Course.
2. Select Curriculum Management, Schedule of Classes, Maintain Schedule of Classes.
3. Enter the same term, subject, and course that you used above.
Click OK.
4. On the Meetings page, delete both rows in the grid for instructors A and B, exit the field, and save.
5. Delete the Term Workload Records for Instructors A and B.
6. Select Curriculum Management, Instructor/Advisor Information, Instructor Term Workload.
7. Enter an ID for instructor A and a code for your institution, and click OK.
8. Delete appropriate term data.
9. Select Curriculum Management, Instructor/Advisor Information, Instructor Term Workload.
10. Enter an ID for instructor B and a code for your institution, and click OK.
11. Delete appropriate term data.
12. Remove Workload Hours for the math course.
13. Select Curriculum Management, Schedule of Classes, Adjust Class Associations, Class Components.

14. Enter the institution, term, and course that you have been using, and click OK.
15. Delete the workload hours of 3 for the lecture component and save.
16. Select Curriculum Management, Course Catalog, Course Catalog, Correction.
17. Enter the institution and course that you have been using, and click OK.
18. Delete the workload hours specified for the lecture component and save.
19. Remove Subject Component Multiplier for the Math Course.
20. Select Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload.
21. Enter the code for your institution and the code for the math course, and click OK.
22. Delete the row for lecture and save.
23. Turn off the feature at the institution level.
24. Select Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4.
25. Enter the code for your institution, and click OK.
26. Go to the row inserted with today's date, delete this row, and save.
27. Delete instructor assignment classes.
28. Select Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Correction.
29. Enter the instructor assignment class of *PT*, and then click OK, Delete, and Save.
30. Select Curriculum Management, Instructor/Advisor Information, Instructor Assignment Class, Correction.
31. Enter the instructor assignment class of *FT*, and then click OK, Delete, and Save.
32. Delete assignment types.
33. Select Set Up SACR, Foundation Tables, Academic Structure, Assignment Type, Correction.
34. Enter an assignment type of *ADV* and the code for your institution, and then click OK, Delete, and Save.
35. Select Set Up SACR, Foundation Tables, Academic Structure, Assignment Type, Correction.
36. Enter an assignment type of *LEC* and the code for your institution, and then click OK, Delete, and Save.

Note. You cannot inactivate or delete the autocreated *NON* assignment type. Leave this value as delivered.

Chapter 26

Managing Student Programs, Plans, and Subplans

This chapter provides overviews of academic program and plan activation, program actions and statuses, and program actions where future enrollments or future active terms with no enrollment exist, and discusses how to maintain student program stacks.

Understanding Academic Program and Plan Activation

A student must be active in an academic program and plan to later be activated into a term for that academic program and plan. You can activate students into academic programs and plans by either of the following methods:

- Transmit the student's academic program and plan data through the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions, this being the usual method.
- Enter the student's academic program and plan data manually in the Student Program/Plan component.

The system stores the student's academic program and plan data on rows in the academic program table (ACAD_PROG). Collectively, all of a student's rows in the ACAD_PROG table are called the student's *program stack*. Now the individual is active in an academic program and plan and qualifies for activation into a term.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Adding and Updating Applications," Updating Applications

Understanding Program Actions and Statuses

When you execute program actions to change a student's program data, the corresponding program action status often changes. For your reference, the program actions and program statuses relevant to Student Records are explained in the following table:

<i>Program Action Selected</i>	<i>Explanation</i>	<i>System Updates Program Status To</i>	<i>Additional Steps Required</i>
ACTV (Activate)	A student is ready either to enroll in a term or to be evaluated for transfer credit.	Active in Program	None
WADM (Administrative Withdrawal)	A student is withdrawn for administrative reasons.	Canceled	Post the withdrawal on the student Withdrawal page.
COMP (Completion of Program)	A student has completed the program.	Program Complete	If the student is ready for graduation processing, complete the graduate process on the Student Degrees page.
DEFR (Defer Enrollment)	A person has been admitted, and may be active for one admit term, but will actually enroll in a later admit term. This action lets you change the admit term for the applicant and record that they are deferring enrollment.	The last action's program status.	None
DATA (Data Change), PRGC (Program Change), PLNC (Plan Change)	Data relative to a student's program, plan, or career status was changed.	No status effect.	When you change a student's program with one of these program actions and the start date of the new program is after the effective date of the change, the system automatically resets the Form of Study field on the student's career term record to the default value of enrollment (<i>ENRL</i>). Use the Form of Study field on the Term Activation page to specify a value other than the default.
DISM (Dismissal)	A student is dismissed from the academic institution.	Dismissed	Post the withdrawal on the student Withdrawal page.

<i>Program Action Selected</i>	<i>Explanation</i>	<i>System Updates Program Status To</i>	<i>Additional Steps Required</i>
DISC (Discontinuation)	A student discontinues attendance.	Discontinued	Post the withdrawal on the student Withdrawal page.
LEAV (Leave of Absence)	A student takes a leave of absence from his program.	Leave of Absence	None
RADM (Readmit)	A person has applied to reenter a student career and academic program for which they already have a student record.	Active in Program	When you choose this action, the Career Number field on the Admissions Application Maintenance page becomes editable. On the Application Maintenance page, you must select which student record should be populated with the readmit information if the student enrolls again. Additionally, if you enter this action, the admit type that you enter on the Application Data page must be associated with readmit processing.
RLOA (Return from Leave of Absence)	A student returns from a leave of absence.	Active	Activate the student.
REVK (Revoke Degree)	Revoke a student's degree. The system automatically updates the student degree tables. Revoked degrees do not appear on the student transcript.	Active	Activate the student.
SPND (Suspension)	A student is suspended from your academic institution.	Suspended	Post a withdrawal on the student Withdrawal page.
TRAN (Transfer to Other Career)	A student makes an intercareer transfer.	Program Completed	Activate the student in the new academic career.

Program Action Selected	Explanation	System Updates Program Status To	Additional Steps Required
ADRV (Admission Revocation)	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission.	Cancelled	None
MATR (Matriculation)	A person has completed all necessary steps to become an active student in an academic program.	Active	Activate the student into the academic program.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Updating Application Program Actions and Statuses"

Understanding Program Actions Where Future Enrollments Exist

For certain program actions, if you enter the program action but the student is enrolled in classes where the start date of the term is after the effective date of that program action, the system displays a warning message because these are future enrollments. The program actions affected by future enrollments are the following:

Code	Description	Status
ADRV	Admissions Revocation	Cancelled
COMP	Completion of Program	Completed Program
DISC	Discontinuation	Discontinued
DISM	Dismissal	Dismissed
LEAV	Leave of Absence	Leave of Absence
SPND	Suspension	Suspended
TRAN	Transfer to Other Career	Completed Program

Code	Description	Status
VDIS	Voluntarily Discontinued	Discontinued
WADM	Administrative Withdrawal	Cancelled

If you receive the warning message for one of these program actions, then perform the appropriate action on the student's future class enrollments. Because each academic institution has different policies, the warning message alerts so that you can take action based on your institution's policies.

For example, if you enter a program action of *DISM* (Dismissal) and the student has registered and paid tuition for classes in the following term, your institution might require that you drop the student from the courses and issue a full refund.

Or, if you enter a program action of *COMP* (Completion of Program) and the student has registered for classes in the following term, your institution might require that you activate the student in a nondegree-seeking program by changing the student career number to the new academic program on the Term Activation page. This enables the student to continue attending the academic institution.

Understanding Program Actions Where Future Active Terms with No Enrollment Exist

If you enter certain program actions and a student is active in a future term or terms, where the start date of the term is after the effective date of that program action, and the student has no enrollment in the term or terms, the system displays a warning message. The program actions affected by future active terms with no enrollment are:

Code	Description	Status
COMP	Completion of Program	Completed Program
DISC	Discontinuation	Discontinued
DISM	Dismissal	Dismissed
LEAV	Leave of Absence	Leave of Absence
SPND	Suspension	Suspended
TRAN	Transfer to Other Career	Completed Program
VDIS	Voluntarily Discontinued	Discontinued

Code	Description	Status
WADM	Administrative Withdrawal	Cancelled

You can still save the program action change when you receive the warning message.

If you change the severity of the message (Message Catalog entry 14600, 870) to *Error*, you cannot save the change to the program action. To access the Message Catalog, select PeopleTools, Utilities, Administration, Message Catalog.

Maintaining Student Program Stacks

This section discusses how to:

- Maintain student academic programs.
- Select a student's career requirement terms.
- Maintain student academic plans.
- Maintain student academic subplans.
- (AUS) Enter Australia-specific student program information.
- (CAN) Enter ESIS student program data.

Pages Used to Manage Student Program Stacks

Page Name	Definition Name	Navigation	Usage
Student Program	STDNT_PROG	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program	Add an academic program to a student's program stack, maintain the student's academic program record, or execute program actions that update the student's academic program record.
Career Requirement Term	STDNT_CAREER_SP	Click the Career Requirement Term link on the Student Program page.	Select the student's career requirement term.
Student Plan	STDNT_PLAN	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Plan	Add an academic plan to a student's academic program or modify a student's existing academic plan.

Page Name	Definition Name	Navigation	Usage
Student Sub-Plan	STDNT_SUB_PLAN	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Sub-Plan	Add an academic subplan to a student's academic plan, or modify a student's existing academic subplan.
AUS Student Program	SSR_STD_PRG_AUS	Records and Enrollment, Career and Program Information, Student Program/Plan, AUS Student Program	Enter Australia specific information for the student. Note. The fields on this page are available only if the Australian DEST, HECS, Centrelink, TAC check box is selected on the Academic Institution 6 page.
Cdn Student Program (Canadian student program)	CAN_RPT_STD_ENR	Records and Enrollment, Career and Program Information, Student Program/Plan, Cdn Student Program	Note. This page is available only if the Canadian Government Reporting check box is selected on the Academic Institution 6 page. Define ESIS student program data.

See Also

[Chapter 41, "Tracking Student Data," Tracking Student Attributes, page 1013](#)

[Chapter 44, "Graduating Students," Verifying and Updating Student Degree Data, page 1083](#)

Maintaining Student Academic Programs

Access the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program).

Student Program		Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
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Academic Career:	Undergraduate	Career Requirement Term		Student Career Nbr: 0	
Find View All First 1 of 1 Last					
Status:	Active in Program				
*Effective Date:	07/25/1998	Effective Sequence: 0			
*Program Action:	ACTV	Activate		Action Date: 07/25/1998	
Action Reason:		Joint Prog Appr: ☐			
*Academic Institution:	PSUNV	PeopleSoft University			
*Academic Program:	LAU	Liberal Arts Undergraduate			
*Admit Term:	0330	1998 Fall			
Requirement Term:	0330	1998 Fall			
Expected Grad Term:		*Campus: WALCR		Walnut	
				*Acad Load: Full-Time	
Admissions ☐ From Application Application Nbr: Application Program Nbr: 0					

Student Program page

Academic Career The academic career to which the student's academic program belongs. Students can be active in multiple academic careers, either consecutively or concurrently.

Career Requirement Term Click to access the Career Requirement Term page.

Student Career Number Differentiates a student's multiple academic programs within the same academic career. The default value is zero. For students with multiple academic careers, you can keep the default value. For students with multiple academic programs within the same academic career, you must select a unique academic career number for each academic program that you add. The lowest career number designates the student's primary academic program within the academic career. A student's primary academic program controls the values of various fields on the student's career term record (STDNT_CAR_TERM).

Status Indicates the high-level relationship that the student has with the academic program specified on a given row as of the effective date of the row.

Effective Date Enter the date on which the program action and the other field values on the row becomes effective. If a term has begun and you must update a student's academic program so that a new academic program is the primary one, you must use an effective date that is prior to the maximum program effective date for that term.

Effective Sequence Determines the sequencing of changes to a student's program. The system increments this number whenever you enter new effective-dated changes to a student's academic program data for a given academic career.

Program Action	A change to a student's academic program data. Select the program action that you want to execute. If a student has future enrollments and you enter certain program actions, the system displays a warning message informing you that the student is enrolled in classes after the effective date of the program action. If the program change affects the student's primary academic program, the system resets the FA_ELIGIBILITY field on the STDNT_CAR_TERM table to the appropriate value of the newly assigned academic program, as defined in the Financial Aid Eligible field on the Academic Program page. Plus, the system selects the FA_STATS_CALC field on the STDNT_CAR_TERM table. This indicates to PeopleSoft Financial Aid that a relevant change has been made to the student's career term record and that the FA Term Build process should be rerun for the student.
Action Date	The date that the program action was executed. It can be different from the effective date. The system records and displays the action date for tracking purposes.
Action Reason	Indicates why a particular program action was taken or offers a further description of the program action. For example, you can record that a student withdrew from an academic program. The reason that you enter could be <i>Medical Reasons</i> or <i>Change of Program</i> . Select the reason for the program action.
Academic Institution	The system automatically populates the academic institution, which refers to the academic institution that owns the student's academic program.
Academic Program	Select the student's academic program. To change this value as a student changes academic programs, insert a row, select a program action of <i>PRGC</i> , and select a new value for this field.
From Application, Program Number, and Admissions Application Number	If the student's information on the ACAD_PROG table was transmitted into the table through the Activate Applications matriculation process (ABPCPPRC), the From Application check box is selected and the system displays the admissions application number and program number.
Joint Program Approved	Select to track that a student is in a dual academic program. When you select this check box the system activates the Dual Academic Program field, where you must enter the other academic program in which the student is active for this academic career.

Admit Term	Determines the earliest term in which you can activate a student into a term for this academic career. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC). If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program. The admit term you enter must be greater than or equal to the first term valid for the specified program (or plan or subplan). Also, the student's admit term must be less than or equal to the last admit term for the program (or plan or subplan). When you run the Term Activation process, it validates the term in which you are activating the student against the admit term. If the admit term occurs after the activation term, you cannot complete the term activation.
Requirement Term	Indicates the term in which academic advisement degree progress requirements apply to the student for this academic program. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC). If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program.
Campus	Select the campus on which the student will be active in the specified academic program.
Expected Graduation Term	Select the term in which the student expects to graduate from the specified academic program. Expected graduation term is also used in financial aid need analysis.
Academic Load	Select the academic load that the student will carry within the specified academic program.
(NZL) Funding Source	Select the funding source for this student program. This is the funding source applicable to the student and reported to the Ministry of Education Single Data Return (SDR). It defaults to the enrollment record. The value is inherited from the Admissions application when the student is matriculated. If admissions is bypassed, select the value during the quick admit or manual program addition process. This field is mandatory. Note. This field appears only for students in New Zealand institutions.

See Also

Chapter 26, "Managing Student Programs, Plans, and Subplans," Understanding Program Actions and Statuses, page 645

Chapter 26, "Managing Student Programs, Plans, and Subplans," Understanding Program Actions Where Future Enrollments Exist, page 648

Selecting a Student's Career Requirements Terms

Access the Career Requirement Term page (click the Career Requirement Term link on the Student Program page).

- Academic Career

The academic career for which you are defining the student's career requirement term.
- Career Requirement Term

Indicates the term in which academic advisement degree progress requirements apply to the student for this academic career. Select the student's career requirement term.

Maintaining Student Academic Plans

Access the Student Plan page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Plan).

Student ProgramStudent PlanStudent Sub-PlanStudent AttributesStudent Degrees

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Academic Career:UndergraduateStudent Career Nbr: 0Car Req Term:

Find | View AllFirst1 of 1Last

Status:Active in ProgramAdmit Term:1998 Fall

Effective Date:07/25/1998Effective Sequence:0

Program Action:ActivateAction Date:07/25/1998

Action Reason:Requirement Term:1998 Fall

Academic Program:Lib Arts

Find | View AllFirst1 of 1Last

*Academic Plan:CLSC-BAClassics-BAMajor

*Plan Sequence:10Degree:B.A.

*Declare Date:07/25/1998Degree Checkout Stat:

*Requirement Term:03301998 FallStudent Degree Nbr:

*Advisement Status:IncludeCompletion Term:

Student Plan page

- Requirement Term

Indicates the term in which academic advisement degree progress requirements apply to the student for the given academic program.
- Academic Plan

A valid academic plan is required to activate a student into a term. Select the academic plan for the student. A student can have any number of academic plans within an academic program.

Plan Sequence	The sequence in which degree progress evaluates a student's academic plans. The system increments the plan sequence number each time that you add an academic plan. You can override this value.
Degree	The degree associated with the academic plan.
Declare Date	The date that the student declares the academic plan. The system, by default, displays a date equal to the effective date of the latest program action with a status of <i>Active in Program</i> . You can override this value.
Requirement Term	Indicates the term in which academic advisement degree progress requirements apply to the student for this academic plan. Select the requirement term for the academic plan.
Degree Checkout Status	The degree checkout status when you graduate the student.
Student Degree Number	The system displays this number sequentially after you complete the graduation process. This number also indicates the printing order if multiple degrees are conferred on the same date. The system prints degree information associated with the lowest number first.
Completion Term	The term that the degree requirements were met. The system displays the completion term after you complete the graduation process.
Advisement Status	Determines how the advisement engine processes the academic requirements groups that you have linked to the student's program structure. Select an academic advisement status for the student from the following values: <i>Include</i>: Ensures that all requirement groups that match this structure are pulled into an audit. <i>Not Include</i>: Ensures that all requirement groups that match this structure are not pulled into an audit. <i>Optional</i>: Pulls in requirement groups that match this structure, but will <i>not</i> prevent the overall audit from going complete if unsatisfied.

Maintaining Student Academic Subplans

Access the Student Sub-Plan page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Sub-Plan).

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Mark Dain		SR0404		
Academic Career:		Undergraduate	Student Career Nbr:	0
Find View All First 1 of 1 Last				
Status:		Active in Program	Admit Term:	1998 Fall
Effective Date:		07/25/1998	Effective Sequence:	0
Program Action:		Activate	Action Date:	07/25/1998
Action Reason:				
Academic Program:		Liberal Arts Undergraduate	PeopleSoft University	
Find View All First 1 of 1 Last				
Academic Plan:		Classics-BA	Major	
Requirement Term:		1998 Fall		
Find View All First 1 of 1 Last				
*Academic Sub-Plan:				
Academic Sub-Plan Type:				
*Declare Date:		07/25/1998		
*Requirement Term:				

Student Sub-Plan page

Academic Sub-Plan	Select the academic subplan for the student. A student can have any number of subplans within an academic plan. You can activate students into terms without the student having an academic subplan.
Academic Sub-Plan Type	When you select an academic subplan, the system displays its corresponding type.
Declare Date	The date that the student declares the academic subplan. The system, by default, displays a date equal to the effective date of the latest program action with a status of <i>Active in Program</i> . You can override this value.
Requirement Term	Indicates the term in which academic advisement degree progress requirements apply to the student for this academic subplan. Select the requirement term for the academic subplan.

(AUS) Entering Australia-Specific Student Program Information

Access the AUS Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, AUS Student Program).

Student ProgramStudent PlanStudent Sub-PlanStudent AttributesStudent DegreesAUS Student Program

Amali Peterson

SRAUS001

Academic Career: Undergraduate

Student Career Nbr: 0

Career Req. Term Semester 1 - Autumn 2005

Find | View All

First1 of 3Last

Status: Active in Program

Admit Term: Aut 2005

Effective Date: 01/03/2005

Effective Sequence: 1

Program Action: Matriculation

Action Date: 04/01/2007

Action Reason:

Requirement Term: Aut 2005

Academic Program: Bachelor of Commerce

PeopleSoft Australia Uni

'Mode of Attendance: Internal Mode of Attendance

Total previous RTS EFTSL:

Separation Status Code:

Cohort: 0000 No Cohort

Funding Source: DTF Domestic Tuition Fee

Research Comm Date:

AUS Student Program page

- Mode of Attendance**

Assign a mode of attendance for reporting element 329 to DEEWR in the Load Liability, Past Course Completions, Offer Details, and Preference Details Files.

Values are:

- Completed Course - OLAA
 - External Mode of Attendance
 - Internal Mode of Attendance
 - Multi-modal Mode of Attendance
 - Submission of Original Work
- Total previous RTS EFTSL**
(total previous research training scheme equivalent full-time student load)

Enter any EFTSL amount for the student from a previous institution. This field is used only for research students who require a prior Research Training Scheme EFTSL to be reported to DEEWR as element 460 in the student enrollment file.

Separation Status Code	Select the separation status code for higher degree research students. This code is reported in the DEEWR Enrollment file as element 465. If the field is blank, element 465 is reported as 9. Values are: • <i>Downgrade Doctorate to Masters</i> • <i>Other</i> • <i>Same level transfer</i> • <i>Upgrade Masters to Doctorate</i>
Cohort	Select a cohort for the student that the system will use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected.
Funding Source	Select a funding source for the applicant to indicate the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DEEWR Applications & Offers Collection. See Chapter 50, "(AUS) Generating Government Reports," Generating the Applications and Offers Files, page 1253.
Research Comm Date (research commencement date)	Enter the beginning date for a research student. This date works as an override for the Course of Study commencement date (element 534) in the DEEWR Load Liability file. If this field is blank, the system determines the date from the admit term begin date.

See [Chapter 16, "\(AUS\) Setting Up Government Reporting," Defining Cohort Years, page 392.](#)

(CAN) Entering ESIS Student Program Data

Access the Cdn Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Cdn Student Program).

See [Chapter 17, "\(CAN\) Setting Up Government Reporting," Defining PSIS Student Program Data, page 447.](#)

Chapter 27

Performing Batch Term Activation

This chapter provides an overview of term activation, lists prerequisites, and discusses how to run batch term activation.

Understanding Term Activation

This section lists prerequisites and discusses term activation.

Prerequisites

Before you can activate students into a term, you must activate students into academic programs and plans for that term.

See Also

[Chapter 26, "Managing Student Programs, Plans, and Subplans," page 645](#)

Term Activation

Each term, activating students is a prerequisite process for enrolling students, posting transfer credit, and calculating tuition. To successfully activate a student into a term for a specific academic program, the term activation request must meet the following three criteria:

- The maximum program effective date for the activation term must be later than or equal to the effective date of the student's academic program record.
- The term must be later than or equal to the student's admit term into the academic program.
- The term must have an academic calendar defined in the system.

You can activate the students after they have a valid academic program and plan. Term activation is the process by which you inform the system that admitted and matriculated students are eligible for enrollment, transfer credit posting to their records, and tuition calculation.

Before each enrollment period, you activate students into terms by one of the following three methods:

- Use the batch Term Activation process (SRTRMAC.SQR) to activate groups of students into terms with PeopleSoft Process Scheduler, something that you would typically do only once per term.

- Perform a quick term activation, activating students individually into academic programs and terms, using the Student Program/Plan component and the Term Activation page.

You should use this method on an exception basis.

See [Chapter 28, "Performing Quick Activation," page 685](#).

- Use the Quick Admit component to create a program stack row and term activate an individual student into a term.

See [Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 754](#).

See Also

[Chapter 28, "Performing Quick Activation," page 685](#)

[Chapter 30, "Maintaining Student Career Term Records," page 699](#)

Running Batch Term Activation

This section provides an overview of batch term activation and discusses how to:

- Define global exclusions.
- Define degree status rules.
- Enter required and high-level criteria for processing.
- Enter detailed criteria for processing.
- Enter enrollment lapse rules for processing.
- Enter process control options.
- Create custom populations for processing.

Understanding Batch Term Activation

While you can activate individual students, you will probably activate groups of students at one time. You'll use the Term Activation process (SRTRMAC.SQR) to target and activate specific groups of students.

Through the Term Activation setup and process components, you specify selection criteria that enable you to include and exclude students for term activation. For example, you can create rules that prevent or require activation for students with specific program actions, academic standing actions, service indicators, and degree checkout status. You can also prevent or allow activation based, for example, on student groups or academic programs. If you still need more options, you can define custom populations of students. Regardless of the options that you select, the process looks at the student's program stack to ensure that the student is active in an academic program, then it creates a row for the student in the student term table (STDNT_CAR_TERM).

After you have begun the Term Activation process (SRTRMAC.SQR) you can monitor the process, especially to see if any errors occurred. The process logs all messages to log files, which it writes to a directory on the computer (generally an application server) where the process is run. The process determines the exact location to write the log files by the FILEPREFIX variable, which is set in the SETENV.SQC. If this variable is not set, the process writes the log files to the same directory that houses the SRTRMAC.SQR program.

After you activate students into terms, you can modify certain aspects of a student's term record, including enrollment limits and terms in residence. You do so through the Term Activation component.

Global Exclusion and Degree Status Rules

The Term Activation setup component enables you to specify predefined rules, called *global exclusion rules*, that you can subsequently attach to an instance of the Term Activation process (SRTRMAC.SQR). Global exclusion rules control which students can be activated in a term through the application process. Global exclusion rules comprise global exclusions and degree status rules. You can define multiple global exclusion rules for an academic institution, assigning each rule within an academic institution a unique identification code. Because you define your rules for an academic institution, you also have the added flexibility to create rules specific to each academic institution of a multi-institution college.

For example, your academic institution might have different term activation policies for summer terms as opposed to regular terms. In such a case, your academic institution could set up one global exclusion rule for the summer term and another for the regular term.

When you later run the Term Activation process, you can choose to include the rule in the run parameters. The Term Activation process connects the global exclusions and degree status rules of a global exclusion rule with an implied *or* between each part. Thus, as illustrated on the Global Exclusions and Degree Status Rules pages shown in this section, a global exclusion rule might read as such:

```
(UGRD/PRB2 or UGRD/PRB3) or (RADM/PET or RADM/AMN) or (RG1 or SF1/NOPAY) or =>
((Degree Checkout Status = APPLIED) and (Activation Term < Expected Graduation=>
Term))
```

Important! Global restrictions override any corresponding selections on the Term Activation process run control pages. If you attach a global exclusion rule to a run of the Term Activation process, the rule overrides any conflicting run control parameters.

Technical Aspects of the Term Activation SQR Process

Before the Term Activation process (SRTRMAC.SQR) begins, the program loads all of the selection criteria on the run control pages into memory, including the details of any global exclusion rule that you attached. If the program finds multiple rows of data from scrollable frames, it loads these values into arrays. The program enforces limits on the amount of selection criteria that you can enter on the run control pages during data entry. For example, if you insert too many rows in the Program Action Selection group box on the Selection 2 page, the program ignores any rows beyond the allowable limit and generates a message to the process log indicating that you have exceeded the allowable limit. Most of the selection criteria in the program allow up to 100 rows (arrays). You can run the Term Activation process in either the *Insert* run mode or *Update* run mode, which you specify on the Selection 1 page. The run mode determines the execution path of the program.

When you set the run mode to insert, the main program routine (or initial SELECT statement) selects against the ACAD_PROG table to identify the target population for the process run. For all of the fields on the first page except Student Group, Global Exception Rules, and Student Type, the process determines whether a student is eligible for term activation based on the values it finds for the student on the ACAD_PROG table. The process evaluates each field and constructs a dynamic WHERE clause so that only students that meet the basic criteria can even be considered for term activation.

When you set the run mode to update, the main program routine (or initial SELECT statement) selects against the STDNT_CAR_TERM table instead of the ACAD_PROG table to identify the target population of the process run. Because we are only interested in students who have an existing term row in the STDNT_CAR_TERM table, this enables the process to be much more efficient in accomplishing its task.

In both the Insert and Update run modes, the initial SELECT statement accommodates only some of the possible selection criteria that you provide. After the primary SELECT statement identifies the students eligible for term activation, the process performs various filters on these student records to determine whether each student in this target population meets all of the specified selection criteria and global exclusions.

First, the Term Activation process (SRTRMAC.SQR) writes into memory all academic programs for which a student is *active* for the activation term. For each of a student's active programs, the Term Activation process then takes three passes at the page selection criteria, comparing this selection criteria to the values on ACAD_PROG and STDNT_CAR_TERM records for each student on a program-by-program basis to see if the student is eligible for term activation. If the student does not meet just one of the selection criteria at any point in the compare process, then the process marks the student as ineligible to enroll for that academic program, writes a message to the process log, and moves to the student's next program. For example, if the student is ineligible due to an academic standing restriction, then the process writes a message about this to the process log and moves on to the student's next program. After the process finds one reason for the student being ineligible for term activation for the given program, it does not check for remaining inclusion and exclusion criteria. This methodology dramatically enhances the performance of the process. After the process runs all of the edits against all of a student's active programs, it checks to see if any of these programs are still eligible for term activation. The Term Activation process can only activate a student for one program—her or his primary academic program. When a student has multiple eligible programs, the process selects the primary academic program by taking the program with the lowest STDNT_CAR_NBR and the highest EFFSEQ.

When you set the Selection Criteria field on the Selection 1 page to *Custom*, the Term Activation process executes its task through an entirely different path. In this case, the process combines the selection criteria in the component with the list of students found in the PS_TRMAC_CUST_PPLT table. We deliver this table with the application. You can populate this table by devising an SQR script or through the Custom Population page found in the Term Activation component. However you populate the table, the Term Activation process activates students for all rows in this table, provided that the student passes the referential integrity check and meets the additional page selection criteria that you selected. A key feature of the *Custom* option is that you can activate students for multiple terms in the same run, whereas the *Panel* option (the alternative option) restricts you to one term per process run.

Pages Used to Run Batch Term Activation

Page Name	Definition Name	Navigation	Usage
Global Exclusions	TRMAC_SETUP1	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Setup, Global Exclusions	Define the academic standing and program action exclusions for an academic institution's global exclusion rule.

Page Name	Definition Name	Navigation	Usage
Degree Status Rules	TRMAC_SETUP2	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Setup, Degree Status Rules	Define the service indicator and degree status exclusions for an academic institution's global exclusion rule.
Term Activation - Selection 1	RUNCNTL_TRMAC_1	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 1	Enter values for the required fields of the Term Activation process (SRTRMAC), and enter additional high-level selection criteria to narrow the population of students who qualify for term activation.
Term Activation - Selection 2	RUNCNTL_TRMAC_2	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 2	Enter further the students that the Term Activation process should consider as eligible for term activation for the process run.
Term Activation - Selection 3	RUNCNTL_TRMAC_3	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 3	Enter required enrollment terms or enrollment lapse rules for a single run of the Term Activation process.
Term Activation - Process Control	RUNCNTL_TRMAC_4	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Process Control	Enter how the Term Activation process initializes or sets various values in your PeopleSoft Campus Solutions system.
Custom Population	RUNCNTL_TRMAC_5	Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Custom Population	Create a custom list of students to activate into terms. Or, retrieve, view, and edit an existing custom list of students.

Defining Global Exclusions

Access the Global Exclusions page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Setup, Global Exclusions).

Global Exclusions

Degree Status Rules

Academic Institution:

PSUNV

PeopleSoft University

Global Exclusion Rule:

UGEXCL1

*Descr:

UG Exclusion Rule 1

Academic Standing Exclusions

Find | View All

First

1-2 of 2

Last

*Career

UGRD

Undergraduate

*Academic Standing Action

PRB2

Probation 2

Subj Dism

UGRD

Undergraduate

PRB3

Probation 3

Subj Dism

Program Action Exclusions

Find | View All

First

1 of 1

Last

*Program Action

RADM

Readmit

Action Reason

Service Indicator Exclusions

Find | View All

First

1 of 1

Last

Service Indicator Cd

Service Ind Reason Code

Global Exclusions page

- Academic Institution

The academic institution for which the global exclusion rule applies.
- Global Exclusion Rule

A rule that you can define to prevent the Term Activation process from term-activating students that have certain parameters on their student career term records (STNDT_CAR_TERM table).

Academic Standing Exclusions

- Career

Select the academic career for which you want to exclude an academic standing action from the Term Activation process (SRTRMAC).
- Academic Standing Action

Select the actions (within the academic career) to exclude from the Term Activation process.

The Term Activation process connects each academic standing exclusion using an implied Or statement. For example, in the page above, PSUNV can use the rule to prevent undergraduates that are subject to dismissal (academic standing action equals PRB2 or PRB3) from being activated in regular terms.

Program Action Exclusions

Program Action

Select the program action to exclude from the Term Activation process. This field prompts you with program actions only relevant to term activation.

Action Reason

To exclude a program action only when a particular reason is attached to that action, select a reason. The system prompts you with only the program action reasons related to the program action. When you specify reasons, you must list all of the reasons within that program action that you want the Term Activation process to exclude.

If you want to exclude a program action regardless of the reason, leave this field blank. The Term Activation process excludes all students that have that program action and meet the other run criteria.

The Term Activation process evaluates each academic program-action/action-reason exclusion using an implied *Or* statement. Therefore, never indicate a program action and reason combination and then, for the same program action, leave this field blank. In such a case, the process excludes all actions regardless of the reason you specified. For example, if you list a program action of *RADM* with an action reason of *PET*, then add another row with an action of *RADM* and the reason left blank, the Term Activation process will ignore the first entry and assume that any student with the program action of *RADM*, independent of the reason, must be prevented from term activation.

Service Indicator Exclusions

Service Indicator Cd (service indicator code)

Select the service indicator code to exclude from the Term Activation process.

Service Indicator Reason Cd (service indicator reason code)

To exclude a service indicator code only when a particular reason is attached to that code, select a reason. The system prompts you with only the service indicator reasons related to the service indicator you select. When you specify a reason, you must list all of the reasons within that service indicator that you want the Term Activation process to exclude.

To exclude a service indicator regardless of the reason, leave this field blank. The Term Activation process excludes all students that have that service indicator and meet the other run criteria.

The Term Activation process evaluates each service indicator/reason exclusion using an implied *Or* statement. Therefore, never indicate a service indicator/reason combination and then, for the same service indicator, leave the reason blank. In such a case, the process excludes all reasons regardless of the one specified. For example, if you list a service indicator of *ALL* with a service indicator reason of *BILL*, then add another row with a service indicator of *ALL* and the reason left blank, the Term Activation process ignores the first entry and assumes that any student with the service indicator of *ALL*, independent of the reason, must be prevented from term activation.

Defining Degree Status Rules

Access the Degree Status Rules page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Setup, Degree Status Rules).

Global Exclusions

Degree Status Rules

Academic Institution:

PSUNV

PeopleSoft University

Global Exclusion Rule:

UGEXCL1

UG Exclusion Rule 1

Find | View All

First 1 of 1 Last

*Degree Checkout Status:

Applied

*Term Activate:

Compare

If Activation Term is....

< Expected Graduation Term

Degree Status Rules page

This page enables you to define the students who *can* be term-activated based on their degree checkout status. You also have the option to further define the students who can be term-activated by comparing the activation term to students' expected graduation term. This page works in conjunction with the Degree Checkout Status field on the Student Degrees page in the Student Program/Plan component. If your institution maintains the Degree Checkout Status field, you can then use this functionality. If your institution does not maintain the Degree Checkout Status field, the student will always pass the degree checkout status inclusion when you run the Term Activation process (SRTRMAC).

In the example on the page above, any student who has a degree checkout status of *Applied* qualifies for term activation so long as their activation term is less than their expected graduation term.

Degree Checkout Status

Select the degree checkout status that you want the Term Activation process to either exclude or evaluate for exclusion: *Applied*, *Approved*, *Awarded*, *Denied*, *In Review*, and *Pending*. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Term Activate

Select from the following choices how you want the Term Activation process to evaluate the degree checkout status of students.

Never: Indicates that you want the Term Activation process to never term-activate students that have the degree checkout status you specified. The If Activation Term is... field becomes unavailable to edit.

Compare: Indicates that you want the Term Activation process to determine the students that it excludes from term activation by comparing the student's activation term to the expected graduation term for students who have the degree checkout status that you specified. The If Activation Term is... field becomes available to edit.

For example, if a student has an expected graduation term of spring 2000, you will likely want to term-activate the student for the spring 2000 term but not the fall 2000 term. You can use the Compare option and the other Degree Status Exclusion fields to set up a run parameter to meet this need.

If Activation Term is...

If you select the *Compare* option in the Term Activate field, this field becomes available and required. Select how you want the Term Activation process to compare the student's activation term to the expected graduation term. For example, by setting the Degree Checkout Status field to *Applied* and this field to *< Expected Graduation Term*, you can exclude all students from term activation that *do not* match these two criteria. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

See Also

Chapter 44, "Graduating Students," Verifying and Updating Student Degree Data, page 1083

Entering Required and High-Level Criteria for Processing

Access the Term Activation - Selection 1 page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 1).

Selection 1		Selection 2		Selection 3		Process Control		Custom Population	
Run Control ID: PS		Report Manager		Process Monitor		Run			
Required Fields									
Institution:	PSUNV	PeopleSoft University	*Run Mode:	Insert					
Acad Career:	UGRD	Undergraduate	*Selection Criteria:	Panel					
Actvtn Term:	0570	2006 Fall	*Student Type:	Both					
*Commit Freq:	1000								
Acad Group:	LBART	College of Liberal Arts	Program Action Date Range						
Acad Prog:	LAU	Liberal Arts Undergraduate	Start Date:				31		
Acad Plan:			End Date:				31		
Student Group:									
Global Exclusion Rule:	UGEXCL1								

Term Activation - Selection 1 page

The Term Activation process (SRTRMAC.SQR) provides extensive selection functionality for activating specific student populations into terms by academic career. On the Term Activation setup component you predefine rules of exclusion and inclusion, whereas on the Term Activation process component you define characteristics for the population of students that you want to include in batch term activation. You can also attach a global exclusion rule to a given process instance. All of the selection criteria in this component are additive and meant for you to broaden or narrow the scope of your target population for batch term activation. If you want to perform a basic run of the Term Activation process without specifying inclusions and exclusions, you can select values for all of the fields found in the Required Fields group box on the first page. After you enter values for these fields, you can run the process at any time, ignoring the other fields in the component.

Note. You can only run the Term Activation process for one academic career at a time. If you want to activate students in terms across academic careers, you must run the process for each academic career.

Required Fields

This group box contains all the fields necessary to run the Term Activation process (SRTRMAC). The remaining fields on this page and the other pages in the component are optional. Use them to further restrict who is eligible for term activation on a specific run.

Institution

Select an academic institution. The Term Activation process considers only students active in that academic institution as eligible for term activation.

Run Mode

Select from the following choices the mode in which you want the Term Activation process to run. To ensure optimal performance, the process only allows you run in one mode at a time.

Insert: The Term Activation process considers for term activation only the students not yet activated in the activation term. If eligible, the process adds a new row of term data to the student's career term record (STDNT_CAR_TERM table).

Update: The Term Activation process considers for record modification only the students who already have been activated in the activation term. If eligible, the process updates the student's existing career term data (found in the STDNT_CAR_TERM table). Use other fields in this component to further control how the update function operates.

Acad Career(academic career)

Select an academic career. The Term Activation process only considers students who are active in that academic career as eligible for term activation. The Term Activation process enables you to activate students in only one academic career per process run. To activate students for multiple academic careers, you must run the process for each academic career.

Selection Criteria

Select from the following choices the type of selection criteria that you want the Term Activation process to use for the run.

Panel: Use the fields available in the component to specify the criteria that determines the students who are eligible for term activation. (Default)

Custom: Activate a custom population of students, or large batches of students, for one term or across multiple terms. For example, use this option when you need criteria beyond what the component provides, or when you want to perform a student records conversion.

By selecting this option, you direct the Term Activation process to look at the delivered PS_TRMAC_CUST_PPLT table to determine who should be term-activated. If desired, you can create your own SQR to populate this table.

The Term Activation process, when run with the *Custom* option, selects custom populations from the PS_TRMAC_CUST_PPLT table based on run control ID and user ID. If you select the *Custom* option, you can edit or enter, on the Custom Population page (which is found in this component), the students and the terms for which you want to activate them. Otherwise, the Custom Population page is unavailable to edit.

Actvtn Term (activation term)

Select the term for which you are running the process, known as the activation term. Students that meet all run criteria are activated for this term. If you select a value of *Panel* in the Selection Criteria field, then this field is required. If you select a value of *Custom* in the Selection Criteria field, the Term Activation process uses the term for the student on the PS_TRMAC_CUST_PPLT table or on the Custom Population page in this component.

Student Type

Select from the following choices the type of student to activate. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

New: Activate only students newly admitted to your academic institution.

Continuing: Activate only continuing students.

Both: Activate both new and continuing students simultaneously in a single run. (Default)

Note. The Term Activation process defines new and continuing students by comparing the activation term against the admit term. Students that have the same activation term and admit term are new. Students with an admit term prior to the activation term are continuing.

Commit Freq(commit frequency)

Select how many table rows of information (students) you want to process before committing changes to the database. The default is 1,000. Consult your institution's database administrator for the appropriate setting for your institution. If you set the commit value to higher than the number of rows the program processes, then the program commits data only once at the end of the run. The commit logic for this field is platform independent.

Optional Fields

The use of the Acad Prog (academic program), Acad Plan (academic plan), Acad Group (academic group), and the Program Action Date Range group box fields can improve the performance of the Term Activation process. However, excessive use of global exclusions and other selection criteria, such as academic standing actions, service indicator codes, and required enrollment terms might slow the process.

Acad Group (academic group) Select an academic group to narrow the population of students to term-activate.

Acad Prog (academic program) Select an academic program to narrow the population of students to term-activate.

Acad Plan (academic plan) Select an academic plan to narrow the population of the students to term-activate. You can specify an academic plan independently of an academic program. For example, if you specify both an academic program and plan, then only students active in both the academic program *and* plan are eligible for term activation. However, if you specify an academic plan alone, then only students active in that academic plan regardless of their academic program are eligible for term activation.

Start Date and End Date

The beginning and end of the program action date range.

Use these fields to narrow the population of students to term-activate to a specific range of program action dates. For example, you can use this date range to limit term activation to only the students that have been activated or matriculated into an academic program since the last run of the Term Activation process. The Term Activation process compares this date range to the Action Date field on the Student Program page. The action date is the transaction date on which the student gets activated into an academic program, *not* the effective date. If the action date is greater than or equal to the start date and less than or equal to the end date, the student qualifies for term activation.

To use these fields you must enter values for both. By default, the end date equals the start date.

Student Group

Select a student group to narrow the population of students to term-activate. The process only activates students within that student group who also meet the other selection criteria of the component.

Global Exclusion Rule

If you want to use a global exclusion rule on this run to further narrow the population of students to term-activate, use this field's prompt to select a rule. If you do not want to use global exclusions, leave this field blank. You can specify a different global exclusion rule for each run of the process.

See Also

[Chapter 27, "Performing Batch Term Activation," Defining Global Exclusions, page 665](#)

[Chapter 27, "Performing Batch Term Activation," Defining Degree Status Rules, page 668](#)

[Chapter 27, "Performing Batch Term Activation," Creating Custom Populations for Processing, page 683](#)

Entering Detailed Criteria for Processing

Access the Term Activation - Selection 2 page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 2).

Selection 1

Selection 2

Selection 3

Process Control

Custom Population

Run Control ID: PS

Report Manager

Process Monitor

Run

Program Action Selection

Find | View All

First

1 of 1

Last

Program Action

ACTV

Activate

Action Reason

+

-

Academic Standing Selection

Find | View All

First

1 of 1

Last

Academic Standing Action

GOOD

Good Stand

+

-

Service Indicator Selection

Find | View All

First

1 of 1

Last

Service Indicator Cd

Service Ind Reason Code

+

-

Term Activation - Selection 2 page

This page enables you to narrow your target population for term activation by selecting the program action, action reason, academic standing action, and service indicator data that you want to include.

Note. The Term Activation process (SRTRMAC) connects academic standing, program action, and service indicator selections with an implied *and* between each selection type. The process connects the criteria with an implied *or* within each selection type.

Program Action Selection

Program Action

Select the program action that you want to include for the Term Activation process. In Insert run mode, the system prompts you only with the actions that are eligible for term activation. In Update run mode, the system prompts you with all available actions. You can enter a program action that conflicts with a global exclusion. However, the global exclusion always takes precedence over the selection criteria.

Action Reason

If you want to include a program action only when a particular reason is attached to that action, select a reason in this field. The system prompts you with only the program action reasons related to the program action you specify. When you specify a reason, list all of the reasons within that program action that you want the Term Activation process to include.

If you leave this field blank, the Term Activation process includes all students that have that program action and meet the other run criteria, regardless of the program action reason.

The Term Activation process evaluates each program action and reason combination using an implied *Or* statement. Therefore, never indicate a program action and reason combination and then for the same program action leave the action reason blank. In such a case, the process include all actions regardless of the reason you specified. For example, if you list a program action of *MATR* with an action reason of *FDEP*, then add another row with an action of *MATR* and the reason left blank, the Term Activation process ignores the first entry and assumes that any student with the program action of *MATR*, independent of the reason, is eligible for term activation.

Important! The values you enter in this group box must exist on the student's most current effective-dated academic program row in order for the student to be selected.

Academic Standing Selection**Academic Standing Action**

Select the academic standing action that you want the Term Activation process to include.

The Term Activation process connects each academic standing using an implied *Or* statement. For example, PSUNV might want to make eligible for term activation only students with *GOOD* or *GRE* (great) academic standing that also meet the other run criteria.

Service Indicator Selection**Service Indicator Cd** (service indicator code)

Select the service indicator code that you want to include in the Term Activation process.

Service Indicator Reason Cd
(service indicator reason code)

If you want to include a service indicator code only when a particular reason is attached to that code, select a reason. The system prompts you with only the service indicator reasons related to the service indicator you specify. When you specify a reason, you must list all of the reasons within that service indicator that you want the Term Activation process to include.

If you select a service indicator code and leave this field blank, the Term Activation process includes all students that have that service indicator code and meet the other run criteria, regardless of the service indicator reason.

The Term Activation process evaluates each service indicator/reason combination using an implied *Or* statement. You should therefore never indicate a service indicator/reason combination and then, for the same service indicator, leave the action reason blank. In such a case, the process includes all reasons. For example, if you list a service indicator of *ALL* with a service indicator reason of *BILL*, then add another row with a service indicator of *ALL* and the reason left blank, the Term Activation process ignores the first entry and assumes that any student with the service indicator of *ALL*, independent of the reason, must be eligible for term activation.

Entering Enrollment Lapse Rules for Processing

Access the Term Activation - Selection 3 page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Selection 3).

Selection 1 Selection 2 **Selection 3** Process Control Custom Population

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Connector Type

☒ AND ☐ OR [Set Parentheses](#)

Required Enrollment Terms

	Connector	*Line	*Enrollment Term			
1		20	0530	2004 Fall	+	-
2	AND	30	0522	2004 Summer	+	-
3	OR	40	0530	2004 Fall	+	-
4	AND	50	0518	2004 Spring	+	-

Term Activation - Selection 3 page

If you use this page, a student *must* be enrolled in a term or terms according to the rules you specify to be eligible for term activation in the term specified on the Selection 1 page of this component. You can use the Selection 3 page, for example, to prevent the term activation of students who lack enrollment records for the previous term.

PeopleSoft Campus Solutions defines a class enrollment as the existence of a row in the STDNT_ENRL table. The procedure that calculates what is and is not a class enrollment is a program file named SRENRLCK.SQC. The SQC is separate from the Term Activation process (SRTRMAC) so that your institution can modify the code that determines what is a class enrollment based on your institution's business needs without concern about future changes to the Term Activation process that might affect the modification. The SQC contains only one procedure, named SELECT-ENROLLMENT. The procedure description describes how the user should proceed with making modifications.

Important! Although we provide this feature with significant flexibility, it is always best to keep the rules simple. Enforcing these rules requires complex rule evaluation and possible increased database activity for each student. Too many rules might result in performance issues.

Connector Type

Use the Connector Type group box to specify how the Term Activation process should group individual enrollment requirement lines for evaluation to determine if students qualify for term activation. By choosing a connector type (AND, OR) and either saving the page or clicking the Set Parentheses button, the system displays parentheses so that you can visualize how the Term Activation process will interpret the rules.

AND and OR

Connector types indicating the main (default) Boolean operator to be used in the equation that contains the detail lines.

Select the main connector type (AND, OR) for this term activation criteria. Detail lines joined by the opposite of the main connector type are grouped into one partition. Detail lines joined by the main connector are considered as individual components (or partitions) of the equation. A partition is each detail line in the equation or each set of detail lines grouped by parentheses. For example, if the connector type is AND, and the detail lines are A OR B AND C OR D AND E, then the detail appears on the page as (A OR B) AND (C OR D) AND E. The first partition is (A OR B), the second partition is (C OR D), and the third partition is E. The main connector (that is, the connector that joins the partitions) is AND. The connector joining components within a partition is always the opposite of the main connector type. In another example, if the main connector is OR and the detail lines are A OR B AND C OR D, then the detail appears on the page as A OR (B AND C) OR D. The first partition is A, the second partition is (B AND C), and the third partition is D.

Set Parentheses

Click to parse the individual lines based upon the connector type and the visible parentheses on the page. The parentheses serve as a visual cue to describe how the process will evaluate the criteria. You can also save the page to have the system automatically recalculate the parentheses. You might need to reset the parentheses when you add additional lines, change the line order, or change the connector type.

Parentheses cannot be explicitly set to group detail rows.

If the main connector type is AND, then the system automatically creates partitions where AND is the main connector. For example, if A OR B AND C OR D is entered, then the implied statement is (A OR B) AND (C OR D).

If the main connector type is OR, then the system creates partitions where OR is the main connector. For example, if A OR B AND C OR D is entered, then the implied statement is A OR (B AND C) OR D.

Required Enrollment Terms

Use this grid to specify rules about the terms that students must be enrolled in to qualify for term activation.

Connector	Select a connector to indicate how this detail line is connected with the prior detail line. Values are <i>AND</i> or <i>OR</i> .
Line	This field displays a sequential line number, which the system automatically generates in increments of 10. It determines the order in which the process evaluates the line arguments. Use the Line column to manually reorder the criteria. After manually changing the line numbers, save the page or click the Set Parentheses button to visibly reorder the lines and recalculate the parentheses.
Enrollment Term	Select the term in which students must be enrolled to qualify for term activation. The Term Activation process determines class enrollment by locating a row for students in the STDNT_ENRL table for the specified term. In the example depicted in the page above, the rule specified requires that the student have at least one class enrollment in the STDNT_ENRL table for one of the two concurrent terms. Specifically, a student could satisfy this rule and thereby be included in the term activation selection by being enrolled in (fall 2004 AND summer 2004) OR by being enrolled in (fall 2004 AND spring 2004). This structure supports any combination of requirements.

Entering Process Control Options

Access the Term Activation - Process Control page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Process Control).

Selection 1	Selection 2	Selection 3	Process Control	Custom Population

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Term Value Control	
*Tuition Calc Required:	Busn Unit
*FA Stats Calc Required:	Default
*Eligible to Enroll:	Default
*Refresh Term Cntrl Dates:	No
*Form of Study:	Default
Academic Load:	Full-Time

Process Log Control	
☒ Activated Students	☒ Excluded Students
☐ Activated Student Detail	☐ Excluded Student Detail
☒ Run Criteria	

Term Activation - Process Control page

The upper frame of this page enables you to control how the Term Activation process (SRTRMAC) populates certain values on the student's career term record. The lower frame of the page enables you to specify the type and detail of information for the Term Activation process to write to the log files on any given run of the process. This page is available in both the Insert and Update run modes.

Term Value Control

Use the fields in this group box to define how the Term Activation process interacts with various fields in the STDNT_CAR_TERM table. In Insert run mode, you can define how the process initializes various fields in the table. In Update run mode, you can define how the process updates various fields in the table.

Tuition Calc Required (tuition calculation required)

PeopleSoft Student Financials uses this field to determine if tuition must be calculated or recalculated for students. The option that you select determines the value of the TUIT_CAL_REQ field on the STDNT_CAR_TERM table, setting the value to either *Y* or *N* on the student's career term record. When your institution calculates tuition, the tuition calculation process references this field to determine if a student's tuition needs to be recalculated. Select from the following choices.

Busn Unit: Tells the Term Activation process to use the corresponding field on the Business Unit SF Table to determine the value of the corresponding flag on the student's career term record. When you are in Insert run mode, the system automatically populates this field with the business unit and it is unavailable to edit.

No Change: When you are in Update run mode this is the default value. If you run the Term Activation process with this value set, the process leaves the corresponding field on the STDNT_CAR_TERM table unchanged.

No: Select this option to have the Term Activation process set the TUIT_CAL_REQ field on the STDNT_CAR_TERM table to *N* on each affected student's career term record. When your institution calculates tuition, the tuition calculation process will not recalculate this student's tuition.

Yes: This option is available in Update run mode only. Select this option to have the Term Activation process set the TUIT_CAL_REQ field on the STDNT_CAR_TERM table to *Y* for all students whose career term records it has updated. When your institution calculates tuition, the tuition calculation process will recalculate tuition for these students.

Form of Study

Select how you want to set the form of study for the student's career term record. Values for this field are *Default*, *No Change*, and all of the other delivered translate values for form of study. The *Default* and *No Change* translate values have coding attached to them and should not be modified. You can, however, add other values to the translate table.

In Insert run mode, if the activated student has an activation row for a previous term within the same academic career and you select either the *Default* or *No Change* options, the system carries forward the value from the previous term. If, however, you select *Default* and the student has never been term-activated for the same academic career, the value of this field gets set by default to *Enrollment* (ENRL).

In Update run mode, if you select either the *Default* or *No Change* options, the Term Activation process leaves the Form of Study field unchanged. If you set the field value to anything else while in the Update run mode, the Term Activation process changes the STDNT_CAR_TERM value to the value that you select from the list of translate values.

Note. If you select any value besides *Default*, *No Change*, or *Enrollment* the Academic Load field becomes available and required.

FA Stats Calc Required (financial aid statistics calculation required)

Select from the following choices how you want the Term Activation process to set the FA_STATS_CALC_REQ flag on the STDNT_CAR_TERM table. The Financial Aid Term Build process uses the value of the FA_STATS_CALC_REQ flag to determine if a STDNT_CAR_TERM record should be built or rebuilt for the student term. If the FA_STATS_CALC_REQ flag is set to *Y*, then the Financial Aid Term Build process builds or rebuilds the Financial Aid Term record for the student term. If the FA_STATS_CALC_REQ flag is set to *N*, then the Financial Aid Term Build process assumes no significant changes have been made and skips the student.

Yes: Sets the FA_STATS_CALC_REQ flag to *Y* on each student's STDNT_CAR_TERM record.

No: Sets the FA_STATS_CALC_REQ flag to *N* on each student's STDNT_CAR_TERM record.

Default: Sets the FA_STATS_CALC_REQ flag to *Y* on each student's STDNT_CAR_TERM record.

No Change: Leaves the value of the FA_STATS_CALC_REQ flag unchanged.

Academic Load

In the Update run mode, this value becomes available and required when the Form of Study field value is set to a value other than *Enrollment*, *No Change*, or *Default*. Select the academic load for the student's updated career term record.

Eligible to Enroll

Select from the following choices whether students activated in a term through this process are then eligible to enroll in that term. This field is available in both Insert and Update run modes.

Yes: Select this value to set the Eligible to Enroll flag on the STDNT_CAR_TERM record to *Y*, making students activated in a term through this process eligible to enroll in that term.

No: Select this value to set the Eligible to Enroll flag on the STDNT_CAR_TERM record to *N*, thus making students activated in a term through this process ineligible to enroll in that term.

Default: Select this value to have the process look at the value of the student's Eligible to Enroll flag on her or his STDNT_CAR_TERM record for a prior term within the same academic career. In Insert run mode, if the student does not have a term activation row for a prior term within the same academic career, the process sets the flag on the student's career term record for the current term to *Yes*, making the student eligible to enroll. If the student does have a term activation row for a prior term within the same academic career, the process carries forward the value of the Eligible to Enroll flag to the current term activation row.

No Change: In Update run mode, select this option to have the Term Activation process leave the value of the Eligible to Enroll flag on the STDNT_CAR_TERM record unchanged.

Refresh Term Cntrl Dates
(refresh term control dates)

Controls how the Term Activation process carries down certain term control dates from the academic calendar (ACAD_CALTRM_TBL) to the individual student career term record. The process refreshes the dates in the following fields on the student career term record: Fully Enrolled Date, Show Enrollment on Transcript Date, Show Statistics on Transcript Date, and Fully Graded Date. Values are *Yes* and *No*.

In Insert run mode, the system populates this field with *Yes* because the Term Activation process always carries down the term control dates from the academic calendar. In this mode the field is unavailable to edit.

In Update run mode, the system populates this field with *No* to indicate that the process should leave the term control dates unchanged. However, you can change this value to *Yes*, which is especially useful if students have already been activated in a term and you need to change any of the control dates for that term.

Process Log Control

Use the fields in this group box to select how you want the Term Activation process to log statistics by selecting the type and level of detail information that you need. The selected system defaults are *Activated Students*, *Excluded Students*, and *Run Criteria*. The system assigns a unique process number to the log file `srtrmac.dat` that you generate so that you can retain and track online versions of the log files. The log includes processing totals on students activated, students updated, and students ineligible. You can view the log by accessing the Report/Log Viewer page and clicking the Trace File link. Access the Report/Log Viewer page either by clicking the Report Manager link on the run control page then the appropriate View link on the Report List page, or by clicking the Process Monitor link on the run control page, the appropriate Details link on the Process Requests page, then the View Log/Trace link. If you only want a count of the students included or excluded from term activation, clear all check boxes.

Activated Students

Select to log students who are included in term activation. The log file provides employee ID, activation term, action taken by the process, academic institution, academic career, and primary academic program.

Excluded Students

Select to log students who are excluded from term activation. The log file provides employee ID, activation term, action taken by the process, academic institution, academic career, and primary academic program.

Activated Students Detail

Select to log students who are included in term activation in greater detail. The log file provides employee ID, academic career, career number, activation term, academic group, academic program, academic plan, program action, program action reason, admit term, effective date, term activation action, and term activation exclusion reason.

Excluded Students Detail

Select to log students who are excluded from term activation in greater detail. The log file provides employee ID, academic career, career number, activation term, academic group, academic program, academic plan, program action, program action reason, admit term, effective date, term activation action, and term activation exclusion reason.

Run Criteria

Select to log all page selection criteria and run control options, including the global exclusion rule, for the process instance.

Creating Custom Populations for Processing

Access the Custom Population page (Records and Enrollment, Term Processing, Term Activation, Term Activation Batch Process, Custom Population).

Selection 1 Selection 2 Selection 3 Process Control **Custom Population**

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria

Term: ID: [Refresh](#)

Custom Population List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-5 of 6 | [Last](#)

ID	Name	Term		
1 SR0430	No,Chong Sik	0530	+	-
2 SR0418	Isaac,Aaron	0530	+	-
3 SR0400	Beck,Ana	0530	+	-
4 SR0400	Beck,Ana	0522	+	-
5 SR0436	Ramirez,David	0530	+	-

Custom Population page

The system transfers this data to and from the PS_TRMAC_CUST_PPLT table by OPRID (operator ID) and run control ID. Rather than manually entering students into the table, you can populate the table using a specialized SQR script that your institution develops to accomplish the task.

When you run the Term Activation process (SRTRMAC) for a custom population, the process knows which students to run from the PS_TRMAC_CUST_PPLT table by looking at the OPRID and run control ID. It processes all valid rows of data it finds in the PS_TRMAC_CUST_PPLT table, provided that you have set the Selection Criteria field on the Selection 1 page to *Custom*. Otherwise, the system makes this page unavailable and the process disregards the data in the table.

A key feature of the *Custom* option is that you can activate students for multiple terms in the same run, whereas the *Panel* option (which is the alternative option) restricts you to one term per process run. In addition, the *Custom* option enables you to use other selection criteria fields in the component (except the Term field on the Selection 1 page) to narrow your population selection. Please note, however, that the process supports only one academic institution and one academic career at a time. You specify the academic institution and academic career on the Selection 1 page, which is the first page in this component. If you load the table with an SQR script (thus bypassing the page edits) and subsequently try to run the process for more than one academic institution and academic career at a time, the process halts and writes an error message to the process log.

Note. The Term Activation process functions independently of the rows visible for viewing in the page grid. You do not need to retrieve and load the data into the page before running the process.

Warning! Loading a large amount of data into the page can adversely affect performance.

Term	Select the term for which you want to retrieve rows of data from the PS_TRMAC_CUST_PPLT table. If you want to search on all terms for an academic institution and academic career (as specified on the Selection 1 page), then leave this field blank.
ID(employee ID)	Select an student identification number to retrieve, from the PS_TRMAC_CUST_PPLT table, rows of data on a specific person. The system prompts against the PS_TRMAC_CUST_PPLT table and displays all applicable student IDs in that table according to user ID, run control ID, term for which you are searching, and academic institution and academic career (as specified on the Selection 1 page).
Refresh	Click to retrieve rows of data from the PS_TRMAC_CUST_PPLT table that match the criteria you entered in the Term and ID fields. This feature is optional, letting you view and edit your custom population before running the Term Activation process.
ID (employee ID)	The grid displays data rows retrieved from the PS_TRMAC_CUST_PPLT table according to your search criteria in the Term and ID fields above the grid. The system displays the employee identification number of the person to which the row of data pertains. To add to the list of retrieved data or to make a new custom list, select a student ID. The system prompts against a view of the ACAD_PROG table (STDNT_PROG_VW), which lists all student IDs with a program row (active or inactive).
Name	The system displays the name of the person to which this row of data pertains, as retrieved from the PS_TRMAC_CUST_PPLT table. If you are inserting an additional row or creating a custom list, the system displays the person's name when you exit the ID field.
Term	Select the term for which you want to activate the student. If you have searched for and retrieved the data row from the PS_TRMAC_CUST_PPLT table, the system displays the term for which you searched. You can change the term.

Chapter 28

Performing Quick Activation

Frequently, you might have to activate a student quickly, bypassing the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions and moving the student rapidly into Student Records, assuming that the student's name and address are in the system.

This chapter discusses how to process a quick activation.

Processing a Quick Activation

To process a quick activation:

1. Activate the student into an academic program and plan through the Student Program/Plan component by updating the program action code on the Student Program page to *ACTV* (active).

The student must have an active academic program and plan for you to activate the student into a term. Select Records and Enrollment, Career and Program Information, Student Program/Plan.

2. Activate the student into a term through the Term Activation page.

Select Records and Enrollment, Student Term Information, Term Activate a Student. When you save the information on this page, you have completed the quick activation process. The student is now ready to enroll in classes for the term.

See Also

Chapter 26, "Managing Student Programs, Plans, and Subplans," Maintaining Student Program Stacks, page 650

Chapter 27, "Performing Batch Term Activation," page 661

Chapter 30, "Maintaining Student Career Term Records," page 699

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Adding and Updating Applications," Updating Applications

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information"

Chapter 29

Creating Student Blocks

This chapter provides an overview of student blocks and discusses how to:

- Update mass change operator security.
- Create a student block mass change definition.

Understanding Student Blocks

A student block is a grouping of student information into blocks based on a number of common academic characteristics. Student blocks can be essential during enrollment because they enable you to mass enroll groups of students into blocks of courses.

You can create student blocks on the Create Student Block Page (STDNT_BLOCK) by manually entering student IDs into a student block, but this becomes inefficient when dealing with large groups of students. For example, you may want to enroll hundreds of first year computer science students into a common, core curriculum based on their academic level and academic plan.

To meet this need for mass enrolling large student blocks, your system includes a mass change type and mass change template called Create Student Block. With these mass change tools, you can create and run mass change definitions that will generate SQL for large student blocks based on your criteria and defaults.

After you create your student block through a mass change definition, you can use the Mass Enrollment process to create a course enrollment block, associate the student block with the course block, and then post the enrollment transactions.

Mass Change

Mass change is a SQL generator that you can use to develop and perform custom applications. Using mass change, a developer can set up a series of INSERT, UPDATE, or DELETE SQL statements that the end user can run to perform business functions.

When you use mass change, you are essentially running SQL statements to manipulate the data in the application. The overall structure of mass change is similar to that of PeopleSoft Query, except that Query retrieves data from the database, while mass change actually updates the database.

Updating Mass Change Operator Security

In order for end users to be able to select the Create Student Block template when creating a mass change definition, the template must be added to the user security for the user or class profile to which the end users belong.

This section discusses how to update operator security.

Page Used to Update User Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security	MC_OPER_SECURITY	PeopleTools, Security, Mass Change Operator Security, Security	Grant access to the Create Student Block mass change template to permission lists so that users can run the Create Student Block mass change process.

Updating Operator Security

Access the Security page (PeopleTools, Security, Mass Change Operator Security, Security).

Security

Permission List: HCCPCSSA1000
Description: CS Administration - All Pages

☒ OK To Execute Online

Mass Change

[Customize](#) | [Find](#) |

First 1-84 of 84 Last

Mass Change Template ID		
Application Prog Update Select		
CR-Intv-Delete		
CR-Intv-Delete-Org		
CR-Intv-Insert 3CEngine		
CR-Intv-Insert 3CEngine-Org		
CR-Mbrshp-Delete		
CR-Mbrshp-Delete-Org		
CR-Mbrshp-Insert 3CEngine		
CR-Mbrshp-Insert 3CEngine-Org		
CampDir_Alumni		
CampDir_Staff		
CampDir_Student		
Checklist - Admin Function		
Checklist - Delete Temp		
Communication - Admin Function		
Communication - Delete Temp		
Create Student Block		

Security page

Mass Change Template ID Select the *Create Student Block* template ID.

Creating a Student Block Mass Change Definition

This section provides an overview of mass change definitions and discusses how to:

- Create mass change definitions.
- Specify Student Administration parameters.
- Specify student block criteria and defaults.

- Generate mass change SQL text for student blocks.
- View mass change execution history.

Understanding Mass Change Definitions

Mass change definitions are built using mass change templates and are generally created and run by end users. Mass change definitions are used to specify the values and operators for each field in the WHERE clause of the SQL statement, to specify the values for default fields, and to generate the actual SQL statements. When you create a definition, all information defaults from the associated mass change type and template, except for the criteria and default field values and operators.

If any changes occur to the mass change template, the system requires that you create a new mass change definition because existing mass change definitions will not recognize the changes.

Pages Used to Create a Student Block Mass Change Definition

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Description	MC_DEFN_00	Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Description	Select the template with which you will create the mass change definition.
Student Administration	MC_DEFN_SA	Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Student Administration	Set parameters such as aid year, academic career, and institution for the mass change definition.
Criteria and Defaults	MC_DEFN_01	Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Criteria and Defaults	Specify the operators and values for the criteria and default fields so that the mass change properly runs the SQL statements.
Generate SQL	MC_DEFN_02	Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Generate SQL	Generate and view the SQL statements, based on the Create Student Block type, template, and definition, before actually running the mass change. Select the option of running the SQL when you save the page.
Execution History	MC_DEFN_03	Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Execution History	View the history of all of your SQL runs for this definition.

Creating Mass Change Definitions

Access the Description page (Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Description).

DescriptionStudent AdministrationCriteria and DefaultsGenerate SQLExecution History

Mass Change Definition:

Create Student Block

*Mass Change Template:

Create Student Block

User ID:

PS

Last Updated:

05/18/2004 9:37:19AM

Archive ID:

Archive Date:

Description:

Create Student Block

Description page

Mass Change Definition

Select the *Create Student Block* template. The system enters the description of the template in the Description field.

Specifying Student Administration Parameters

Access the Student Administration page (Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Student Administration).

Description

Student Administration

Criteria and Defaults

Generate SQL

Execution History

Mass Change Definition:

Create Student Block

Additional Parameters

*Mass Change Default Status:

Pending

*As Of Date:

06/06/2005

*As of Date/Time:

06/06/2005 10:47:00AM

Begin Time:

End Time:

Aid Year:

2005

Academic Career:

UGRD

Undergraduate

SetID:

PSAUS

PeopleSoft Australia

Academic Institution:

PeopleSoft Australia Uni

Stdnt Fin Business Unit:

Comments:

Student Administration page

- Mass Change Default Status**

Select the status that the system will assign to the records created when you generate this mass change.
- As Of Date and As Of Date/Time**

Enter the date and time for the default status.
- Aid Year, Academic Career, SetID, Institution, and Stdnt Fin Business Unit** (student financials business unit)

Enter values as needed for the SQL to filter the data that the process retrieves.

Specifying Student Block Criteria and Defaults

Access the Criteria and Defaults page (Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Criteria and Defaults).

Description		Student Administration		Criteria and Defaults		Generate SQL		Execution History	
Mass Change Definition: Create Student Block									
SQL Statement Find View All First 1 of 1 Last									
Execution Seq: 1		Description: Create Student Block							
Criteria Find View All First 1-2 of 6 Last									
Field Academic Plan Equal To		Field Value Find View All First 1 of 1 Last BA-SO							
Field Academic Program Equal To		Field Value Find View All First 1 of 1 Last BA							
Defaults Customize Find View All First 1-2 of 4 Last									
	Field Label	Mass Change Field Value							
1	Academic Career	RSCH							
2	Academic Institution	PSANZ							

Criteria and Defaults page

The Criteria and Defaults page is the heart of a Mass Change definition and is the key to running effective SQL statements and creating a student block. The Create Student Block mass change runs two SQL statements to create a student block, inserting these statements into the STDNT_BLOCK_HDR record and the STDNT_BLOCK_DTL record so that you can select to use your student block during the Mass Enrollment process.

Important! To properly run the mass change and generate the student block that you want, it is essential that you know the exact values of the criteria and default fields. For example, if you want to create a student block for all students with the academic plan equal to BA-SO, an academic program equal to BA, and a projected academic level equal to 20 (sophomore), then you must enter these values in the respective criteria fields and leave the remaining criteria fields blank.

Criteria

Field and Field Value

Specify the operators and values of each field as necessary to restrict and unrestrict the data set that mass change selects to generate the student block you want.

Mass change will add this criteria to the end of the insert SQL statements that it generates.

The following criteria fields are delivered with the Create Student Block template:

- Academic Program
- Academic Plan
- Term
- Academic Level - Projected
- Academic Load
- Total Grade Points

Defaults

Mass Change Field Value

Specify values for each default field. Mass change uses the default values in the insert statements.

For example, you must input a value for the Student Enrollment Block code and description in order for your student block to appear as a choice during mass enrollment.

Following are the default fields that the application delivers with the Create Student Block template:

- Academic Career: Mass change inserts this value in the STDNT_BLOCK_DTL record.
- Academic Institution: Mass change inserts this value in the STDNT_BLOCK_DTL record.
- Student Enrollment Block Code: This is the unique identifier for the student enrollment block.

Mass change inserts this value in the STDNT_BLOCK_DTL record. During mass enrollment, this value appears as a choice from the prompt box for the Student Enrollment Block field on the Mass Enrollment page.

- Student Enrollment Block Description: Mass change inserts this value in the STDNT_BLOCK_HDR record.

During mass enrollment, this value appears as a choice from the prompt box for the Student Enrollment Block field on the Mass Enrollment page.

Warning! Do not delete Default rows from your definition. This will prevent the mass change definition from running properly.

Generating Mass Change SQL Text for Student Blocks

Access the Generate SQL page (Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Generate SQL).

Mass Change Definition: Create Student Block

Generate **Clear Sw** ☐ **Execute SQL Upon Saving**

SQL Statement Find | View All First 1 of 1 Last

Execution Seq: 1 **Description:** Create Student Block

Sub Sequences Find | View All First 1 of 2 Last

```
INSERT INTO PS_STDNT_BLOCK_HDR (DESCR, INSTITUTION, STDNT_ENRL_BLOCK) SELECT DISTINCT 'Research
Students - AI', 'PSANZ', 'RSCH' FROM PS_MC_DEFN MC_DEFN, PS_MC_DEFN_MC_DEFN_, PS_ACAD_PROG ACAD_PROG,
PS_ACAD_PLAN ACAD_PLAN, PS_STDNT_CAR_TERM STDNT_CAR_TERM WHERE MC_DEFN.MC_DEFN_ID = 'Create
Student Block' AND MC_DEFN.MC_DEFN_ID = MC_DEFN_MC_DEFN_ID AND ACAD_PROG.ACAD_CAREER =
ACAD_PLAN.ACAD_CAREER AND ACAD_PROG.ACAD_CAREER = STDNT_CAR_TERM.ACAD_CAREER AND
ACAD_PROG.EMPLID = ACAD_PLAN.EMPLID AND ACAD_PROG.EMPLID = STDNT_CAR_TERM.EMPLID AND
ACAD_PROG.INSTITUTION = STDNT_CAR_TERM.INSTITUTION AND ACAD_PROG.STDNT_CAR_NBR =
ACAD_PLAN.STDNT_CAR_NBR AND ACAD_PROG.STDNT_CAR_NBR = STDNT_CAR_TERM.STDNT_CAR_NBR AND
ACAD_PLAN.ACAD_PLAN = 'BA-SO' AND ACAD_PROG.ACAD_PROG = 'BA'
```

Count **Total rows to be** 0

Generate SQL page

The mass change user ID (shown on the Description page) must be the same as the ID of the person running the mass change. Thus, if you created the mass change definition, then only you can run the mass change. Otherwise, you must create a new mass change definition using the appropriate template and save the newly created definition with your ID.

After you run the SQL, the system populates the STDNT_BLOCK_HDR record and the STDNT_BLOCK_DTL record with the student block values that you created. You can then select to use the student block that you create in the Mass Enrollment process. Your student block will appear as a choice in the prompt box for the Student Enrollment Block field on the Mass Enrollment page. You can also view your student block on the Mass Enrollment Student Block page.

Clear Sw(mass change clear switch)

Click when you first open the page and want to generate a new SQL.

Also click this button if you are unhappy with the SQL that the mass change generates and need to rewrite the definition to better fulfill your needs.

Execute SQL Upon Saving

Select if you are positive that you want to run the SQL. If you select this option and then click the Generate SQL button, mass change runs the SQL as soon as you click the Save button.

If you do not select this check box, you can save the mass change definition, then run it in the background using a run control.

Generate SQL

Click to have mass change generate the SQL statements based on the mass change type, template, and definition.

SQL Statement

Displays the SQL statement text for you to review.

Verify that any FROM and WHERE clauses reference the proper tables, fields, and values.

Count

Click to display the total number of rows affected by each statement. If the totals are what you expect, select the Execute SQL Upon Saving check box and save the definition.

If the count is not what you expected, redefine the definition.

After you run the SQL statements for your Create Student Block mass change definition, you should look at the STDNT_BLOCK_HDR and STDNT_BLOCK_DTL tables to make sure that the inserts have successfully created the records. You can also view this from the Mass Enrollment Student Block page. If you have successfully run the SQL statements, you can use the Mass Enrollment process to create a course enrollment block, attach the course enrollment block to this student block, and post the enrollment transactions.

Viewing Mass Change Execution History

Access the Execution History page (Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Execution History).

The fields on this page are the same as the fields on the Criteria and Defaults page.

Chapter 30

Maintaining Student Career Term Records

This chapter lists prerequisites and discusses how to:

- Use the Term Activation component.
- Query for academic level differentials.

Prerequisites

Before you can use all of the elements in the Term Activation component, you must:

- Activate the student in an academic program.
- Set up default enrollment limits on the Term Enrollment Limits page of the Academic Program Table component.
- Define term control date default values on the academic calendar.

Using the Term Activation Component

This section discusses how to:

- Maintain a student's career term record.
- Maintain a student's term enrollment limits.
- Maintain a student's session data.
- Maintain a student's terms in residence.
- Maintain a student's term control dates.
- Track and maintain a student's external study agreements.
- (AUS) Set student term default values.
- (NZL) Maintain single data return (SDR) reporting data for a student.

Pages Used to Maintain Student Career Term Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Term Activation	STDNT_ACTIVATION	Records and Enrollment, Student Term Information, Term Activate a Student, Term Activation	Maintain a student's career term record or activate a student into a term.
Loan Election	SSR_LOAN_ELEC_AUS	Records and Enrollment, Student Term Information, Term Activate a Student, Loan Election	Note. This page is for Australian institutions only. To activate the page, select the Australia DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page. Set default values for the student's career number and liability status for course enrollments.
SDR (single data return)	SSR_STD_CRTRM_NZL	Records and Enrollment, Student Term Information, Term Activate a Student, SDR	Note. This page is for New Zealand institutions only. To activate the page, select the New Zealand Catalog, SDR, EFTS, StudyLink check box on the Academic Institution 6 page. Enter fee information for the student's program for SDR reporting.
Enrollment Limit	STDNT_ENRL_LIM	Records and Enrollment, Student Term Information, Term Activate a Student, Enrollment Limit	Maintain a student's term enrollment limits.
Student Session	STDNT_SESSION	Records and Enrollment, Student Term Information, Term Activate a Student, Student Session	Maintain a student's session data within the student's career term record.
Terms In Residence	STDNT_CAREER_RES	Records and Enrollment, Student Term Information, Term Activate a Student, Terms In Residence	Maintain a student's terms in residence or adjust a student's transfer credit values.

Page Name	Definition Name	Navigation	Usage
Term Control Dates	STDNT_TERMCNTRL_DT	Records and Enrollment, Student Term Information, Term Activate a Student, Term Control Dates	Maintain a student's term control dates, including the fully enrolled date, fully graded date, and dates for showing enrollment and statistics on transcripts.
External Study	STDNT_EXT_STUDY	Records and Enrollment, Student Term Information, Term Activate a Student, External Study	Track and maintain external study programs, such as study abroad, that apply towards a student's career term record.

Maintaining a Student's Career Term Record

Access the Term Activation page (Records and Enrollment, Student Term Information, Term Activate a Student, Term Activation).

The screenshot shows the 'Term Activation' page for student Ana Beck (SR0400). The page has several tabs: 'Term Activation' (selected), 'Enrollment Limit', 'Student Session', 'Terms In Residence', 'Term Control Dates', and 'External Study'. Below the tabs, the student's name 'Ana Beck' and ID 'SR0400' are displayed. A red 'X' icon is visible next to the ID. The page shows a list of academic career records. The first record is for 'Undergraduate' studies at 'PSUNV' (PeopleSoft University). The record details include: *Academic Institution: PSUNV, *Term: 0505 (2003 Fall Semester), *Activation Date: 01/20/2003, Student Career Nbr: 0 (Liberal Arts Undergraduate), Override All Academic Levels: [unchecked], Academic Year: 2004, Override Projected Level: [unchecked], Load Determination: Units, Academic Level - Projected: Freshman, *Form of Study: Enrollment, Academic Level - Term Start: Freshman, Academic Load: No Units, Academic Level - Term End: Freshman, *Billing Career: UGRD, Level Determination: Units, and Eligible To Enroll: [checked].

Term Activation page

Academic Career

This field displays all of a student's career term records by academic career.

Academic Institution

The system supplies an academic institution from the User Defaults component. You can specify any valid academic institution here, but you can add a record only if the student is active in an academic program at that academic institution as of the start date of the specified term.

Term	The system displays all active terms for a student. If you are performing a quick activation, enter the term in which to activate the student.
Student Career Nbr (student career number)	By default, the system sets the student career number to zero, which is the first academic program in the student's program stack and identifies the student's primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student's academic level and load. You can override the student career number, for instance, for students in dual programs. After you override the student career number in one term, it rolls from term to term.
Override All Academic Levels	Select to modify all academic level fields on this page. This selection carries over to the next term, so when you add a new row to activate the student in the next term, this check box is selected by default. Also, when you override all academic levels, the system sets all academic levels for the next term to the end of term level for the prior term row. You should select this check box sparingly, because doing so prevents the system from automatically determining the student's academic levels. If you clear this check box, the system uses the academic level defaults that are established on the Academic Level Table page.
Override Projected Level	Select to modify the student's projected academic level. When you select this check box the Academic Level - Projected field becomes available to edit. If you clear this check box, the system recalculates the academic level projected if the level rule uses units or term progression.
Academic Level - Projected	The system displays the student's projected academic level at the start of the term, which is the student's actual academic level, provided that the student passes all in-progress units from previous terms. The system uses this field for enrollment restriction checking and tuition calculation, among other things. You can override this field value if you select either the Override Projected Level check box or the Override All Academic Levels check box. You might override a student's projected academic level when you know that your academic institution will be receiving the student's transfer credit, but the credit has not yet been entered into the student's official record. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row. Note. When a student is activated for a term, either through the batch Term Activation (SRTRMAC.SQR) process or in the Term Activate a Student (STDNT_ACTIVATION) component, the Override Projected Level check box is cleared and the Academic Level - Projected field becomes unavailable for edit.
Level Determination	By default, the system displays the level determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row

Load Determination	By default, the system displays the load determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row.
Academic Level - Term Start	By default, the system displays the student's academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.
Academic Level - Term End	By default, the system displays the student's academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.
Academic Year	By default, the system displays the academic year, based upon the term that you enter.
Academic Load	The system displays the student's academic load, which is calculated in units enrolled if the level load rule is set to determine load based on units. Alternatively, the rule could determine load using a default value—assigned on the level load rule itself—or the load could be determined manually.
Form of Study	The system, by default, sets the student's form of study to <i>Enrollment</i> , but you can override this default value. The value of <i>Enrollment</i> tells the system that this form of study is unit-based. You can modify these translate values, with the exception of the <i>Enrollment</i> value.
Eligible To Enroll	The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. Clear this check box to prevent the student from enrolling in classes for the specified term. You might clear this check box when posting transfer credit to a student's career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.

Billing Career

The system, by default, sets the student's billing career to the academic career in the student's career term record. The tuition calculation process uses the student's billing career to calculate the student's tuition.

If the student is active in more than one academic career in the same term, you might want to consolidate tuition calculation and billing under a single academic career. If so, then point the billing career for all of the student's career term records to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. If you want to consolidate tuition calculation to just the undergraduate career, you would select undergraduate as the billing career for both the student's undergraduate term record and graduate term record.

If you decide to use a single billing career for all of a student's academic careers within a term, note that to perform a term or session withdrawal, the student must be enrolled in at least one class within the academic career that you select as the student's billing career. Otherwise, the term withdrawal and session withdrawal processes halt processing and instruct you to change the student's billing career to an academic career in which the student has enrollments for the term.

Calculate Tuition

Click to go to the Tuition Calc (tuition calculation) page so that you can calculate tuition and fees for this student.

See Also

[Chapter 39, "Processing Transfer Credit," page 921](#)

[Chapter 34, "Using Enrollment-Related Processes," Processing Withdrawals and Cancellations, page 839](#)

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees," Calculating Tuition for Multiple Students

(AUS) Setting Student Term Default Values

Access the Loan Election page (Records and Enrollment, Student Term Information, Term Activate a Student, Loan Election).

Term Activation

Loan Election

SDR

Enrollment Limit

Student Session

Terms In Residence

Rave Ramon

SRAUS4005

Find | View All

First

1 of 1

Last

Academic Career:

Undergraduate

Find | View All

First

1 of 2

Last

Academic Institution:

PeopleSoft Australia Uni

Term:

Spr 2005

Semester

Primary Academic Program:

Bachelor of Arts

Find | View All

First

1 of 1

Last

Student Career Nbr:

0

BART

+

-

Liability Status:

☐ Subject to Fixed HECS

Scholarship Type:

00

None/Not reported to DEST

Overseas Fee:

Loan Election page

- Student Career Nbr (student career number)

Select a career number for the student. You can enter multiple rows when the student has multiple programs/career numbers.
- Liability Status

Enter a liability status. This value defaults to the enrollment pages.
- Subject to Fixed HECS

Select if the student qualifies to pay the fixed HECS fee for class enrollment.
- Scholarship Type

Select the appropriate scholarship type for this student.

When you generate the DEST Commonwealth Learning Scholarship file, the system includes all students who have a scholarship type of 3, 4, or 5. Type 5 scholarships have two records, one for CECS and one for CAS.

See [Chapter 50, "\(AUS\) Generating Government Reports,"](#) page 1221.
- Overseas Fee

Enter any overseas fees for the student.

(NZL) Maintaining SDR Reporting Data for a Student

Access the SDR page (Records and Enrollment, Student Term Information, Term Activate a Student, SDR).

Term Activation

Loan Election

SDR

Enrollment Limit

Student Session

Ronald BradleySRNZL2001

Find | View AllFirst1 of 1Last

Academic Career:

Undergraduate

+ -

Find | View AllFirst1 of 2Last

Academic Institution:

Silver Fern University

+ -

Term:

Aut 2005

Semester

Primary Academic Program:

Bachelor of Commerce

Find | View AllFirst1 of 1Last

Student Career Nbr:

Academic Program:

Bachelor of Commerce

+ -

Foreign Fee:

MAX Exempt Fee:

SDR page

- Student Career Nbr (student career number)

Select a career number for the student.
- Foreign Fee

Enter any foreign fee for the student.
- MAX Exempt Fee

Enter the sum of all non-maxima fees charged to this student.

Maintaining a Student's Term Enrollment Limits

Access the Enrollment Limit page (Records and Enrollment, Student Term Information, Term Activate a Student, Enrollment Limit).

Term Activation	Enrollment Limit	Student Session	Terms In Residence	Term Control Dates	External Study
Ana Beck		SR0400			
Find View All First 1 of 1 Last					
Academic Career:		Undergraduate			
Find View All First 1 of 7 Last					
Academic Institution:		PeopleSoft University			
Term:		2003 Fall Semester			
Primary Academic Program:		Liberal Arts Undergraduate			
Academic Group of Advisor:		LBART			
*Approved Academic Load:		Full-Time			
Override Unit Limits:		☒			
Max Total Units:		18.00		Max Audit Units:	3.00
Max No GPA Units:		6.00		Max Wait List Units:	12.00
Min Total Units:		8		Max Total Courses:	

Enrollment Limit page

Approved Academic Load

The system, by default, displays the student's approved academic load for their primary academic program for the term. You can override this value.

The student's approved academic program is set on the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program).

Override Unit Limits

Select to override the student's term enrollment limits for the approved academic load that you selected. The unit limit fields become available for entry. When processing enrollment requests with this override, the enrollment engine uses the term enrollment limits that you define on this page rather than the ones that are defined on the Enrollment page of the Academic Program Table component. When using this override, the enrollment engine *does not* include the wait list units in the maximum total unit limit. For example, assume that you limit the student to 18 maximum total units, 3 maximum no GPA units, 3 maximum audit units, and 9 maximum wait list units. The student can enroll in a maximum of 18 units for the term. Of these 18 units, the student can take 9 no GPA units (including 3 audit units). In addition to the 18 maximum total units, the student can take an additional 9 wait list units.

Clear this check box to have the enrollment engine use the term enrollment limits that are set on the Enrollment page of the Academic Program Table component.

Max Total Units(maximum total units)

Enter the maximum number of units that the student can enroll in for the term.

Max Audit Units (maximum audit units)

Enter the maximum number of units that the student can take with an audit-grading basis for the term.

Max No GPA Units (maximum no GPA units)	Enter the maximum number of units that the student can enroll in with a non-GPA-grading basis for the term.
Max Wait List Units (maximum wait list units)	Enter the maximum number of wait list units that the student can have for enrollment for the term.
Min Total Units (minimum total units)	Enter the minimum number of units that the student must enroll in for the term. The enrollment engine references this value only when a student attempts to drop a class or make a units adjustment for a class.
Max Total Courses (maximum total courses)	The system displays by default the maximum number of courses in which a student can enroll for the term according to the value set on the Course Count Limits page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Setting Up Term Enrollment Limits for Academic Programs

Maintaining a Student's Session Data

Access the Student Session page (Records and Enrollment, Student Term Information, Term Activate a Student, Student Session).

Term Activation | Enrollment Limit | **Student Session** | Terms In Residence | Term Control Dates | External Study

Ana Beck SR0400

Find | View All First 1 of 1 Last

Academic Career: Undergraduate

Find | View All First 1 of 7 Last

Academic Institution: PeopleSoft University

Term: 2003 Fall Semester

Primary Academic Program: Liberal Arts Undergraduate

Find | View All First 1 of 1 Last

***Session:** 1 Regular Academic Session

***Academic Load:** N No Units

***Form of Study:** Enrollment

Fully Enrolled Date: 08/27/2003

***Approved Academic Load:** Full-Time

Override Billing Units: ☐ **Projected Bill Units:**

Student Session page

This page displays all of a student's academic careers, terms, and sessions.

Session	Select the type of session in which the student will enroll into classes for the specified academic program and term.
Academic Load	By default, the system displays the student's academic load for the term. You can change the value for an individual session within the term. The system calculates academic load based on the number of units for which the student is enrolled. This field is unavailable for edit if the form of study for the session is <i>Enrollment</i> .
Form of Study	By default, the system displays the same form of study as defined for the term on the Term Activation page of this component. You can change the form of study for sessions that differ from the term value. For example, a student's form of study for the term is <i>Enrollment</i>, but the student is studying abroad for one session of that term. Values are <i>Abroad</i>, <i>Candidacy</i>, <i>Detached</i>, and <i>Enrollment</i>. You can modify these translate values with the exception of the <i>Enrollment</i> value. By default, the system displays the student's approved academic load according to the value that is set on the Term Enrollment Limits page of the Academic Program Table component. You can override this field for an individual session within the term.
Fully Enrolled Date	The date that the system considers the student fully enrolled for financial aid load calculations and billing purposes. The system, by default, sets the student's fully enrolled date to the corresponding date for the session, as defined in the academic calendar. You can override this date. If you override the fully enrolled date because the student's account is due a refund, you must recalculate the student's tuition. You can calculate a student's tuition through the Tuition Calculation page in Student Financials.
Approved Academic Load	Enter the student's approved academic load, such as <i>Full-Time</i> or <i>Part-Time</i> .
Override Billing Units	Select if want to calculate the student's tuition bill with criteria other than the number of units in which the student enrolls. If you set billing units as a part of tuition calculation, the system displays the number of the student's projected billing units.

See Also

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees"

Maintaining a Student's Terms in Residence

Access the Terms In Residence page (Records and Enrollment, Student Term Information, Term Activate a Student, Terms In Residence).

Term Activation	Enrollment Limit	Student Session	Terms In Residence	Term Control Dates	External Study

Ana Beck SR0400 

Find | View All First  1 of 1  Last

Academic Career: Undergraduate

Find | View All First  1 of 7  Last

Academic Institution: PeopleSoft University  

Term: 2003 Fall Semester

Primary Academic Program: Liberal Arts Undergraduate

Current In Residence Terms:

Transfer In Residence Terms:

Cumulative In Residence Terms: 7.000

TC Units Adjustment:

Copy TC Units

Terms In Residence page

Use terms in residence to track to the number of terms in which a student is activated. Course work can be completed and easily tracked in terms. In addition, work that is accomplished outside the classroom—such as fieldwork and dissertation preparation—is also tracked by term even if the student is not enrolled in formal classes. For students affected by level load rules that are not based on terms, one term row equals one term in residence. For students affected by term-based level load rules, a term row can be greater than, equal to, or less than one term depending on the resident terms adjustment factor of the level load rule.

PeopleSoft Academic Advisement does not use the term value that is stored here to calculate derived list terms in residence. Instead, the Advisement engine creates one term in residence for every term in which a student was enrolled at the academic institution.

Current in Residence Terms	The system, by default, displays the current number of terms in which the student is in residence within his or her primary academic program and term. If the level load rule that applies to the student has a resident terms adjustment factor, the system uses the student's approved academic load and the resident terms adjustment factor to determine the default value. Otherwise, the system displays 1 as the default value. You can override the value in this field.
Transfer in Residence Terms	Enter the number of terms that the student has transferred from another organization.
Cumulative in Residence Terms	The system displays the student's total number of current, past, and transfer terms. The value is the cumulative total of residency terms.

TC Units Adjustment(transfer credit units adjustment)

When you save this component, the system assigns the student to an academic level by adding up the student's transfer credit—for careers in which academic level is determined by units—and subtracting the value that is entered here. This enables you to decrease a student's transfer credit for the purposes of assigning the student to a lower academic level. This calculation does not affect the student's term or cumulative statistics, and the recalculated unit total is not displayed or stored in the system. The calculated sum affects only this student's academic level.

For example, you might allow a student to transfer in a total of 75 units for degree progress purposes, even though the student must remain a sophomore, which means she cannot have more than 59 units based on your level rule setup. To adjust the student's transfer credit units and assign the student to the appropriate academic level, enter *16* in this field. You can view the student's projected academic level, academic level at term start, and academic level at term end, on the Term Activation page. The system uses the value in the TC Units Adjustment field to calculate all of these levels.

Additionally, a field edit prevents you from entering more units in this field than the student has transfer units. So if the student has 10 transfer units, you cannot enter *11* in this field. Therefore, the TC Units Adjustment field subtracts only from transfer units.

Copy TC Units (copy transfer credit units)

Click to complete the transfer credit posting process. When you try to post transfer credit statistics for a student in a particular academic program and for a particular articulation term, the system checks whether the student is active in the term and academic program that you select. If the student is not active in either the academic program or the articulation term, the system sets the status to *Complete*. This enables you to evaluate transfer credit and store the statistical information for a student prior to the completion of the Activate Applications matriculation process (ABPCPPRC) in PeopleSoft Recruiting and Admissions.

After you activate a student in the appropriate academic program and in the articulation term that you selected, you *must* click this button to transfer the student's transfer credit to the STDNT_CAR_TERM table in Student Records, thereby completing the transfer credit posting process. If you do not copy transfer credit units after term activation, the student's career term record will not reflect the student's transfer credit units for the term. Remember to save your changes after you click this button. The system does not update the STDNT_CAR_TERM table until the save is performed.

If you select a term without a transfer credit model status of *Complete*, the system displays a message informing you that there is nothing to update.

See Also

[Chapter 37, "Viewing Class Enrollment Data," Viewing Student Statistics, page 880](#)

[Chapter 39, "Processing Transfer Credit," page 921](#)

PeopleSoft Academic Advisement 9.0 PeopleBook, "Setting Up Academic Requirements," Creating a Requirement Line Item

Maintaining a Student's Term Control Dates

Access the Term Control Dates page (Records and Enrollment, Student Term Information, Term Activate a Student, Term Control Dates).

Term Activation

Enrollment Limit

Student Session

Terms In Residence

Term Control Dates

External Study

Ana BeckSR0400

Find | View All

First1 of 1Last

Academic Career:

Undergraduate

Find | View All

First1 of 7Last

Academic Institution:

PeopleSoft University

+ -

Term:

2003 Fall

Semester

Primary Academic Program:

Liberal Arts Undergraduate

*Fully Enrolled Date:

08/27/2003

31

*Show Enrollment on Transcript:

08/27/2003

31

*Show Statistics on Transcript:

08/27/2003

31

*Fully Graded Date:

12/30/2003

31

Term Control Dates page

- Fully Enrolled Date

Enter the date on which this student is considered fully enrolled in the specified term. As of this date, the student's coursework appears on the student's transcripts. This date is also used for financial aid load calculations and billing purposes. The system, by default, displays the corresponding value from the Term Calendar 3 page for the specified term based on the student's primary academic program for the term.
- Show Enrollment On Transcript

Enter the date on which the system displays the student's work in progress on the transcript.
- Show Statistics On Transcript

Enter the date on which the system displays the student's academic statistics on the transcript.
- Fully Graded Date

Enter the date on which the system considers this student's enrollment record for the specified term as fully graded. This value comes from the academic calendar by default. When you define transcript types, you can indicate whether the transcript processes should use this date and display grade information.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Traditional Academic Calendars"

Tracking and Maintaining a Student's External Study Agreements

Access the External Study page (Records and Enrollment, Student Term Information, Term Activate a Student, External Study).

Loan Election

Enrollment Limit

Student Session

Terms In Residence

Term Control Dates

External Study

Ana BeckSR0400

Find | View AllFirst1 of 1Last

Academic Career:Undergraduate

Find | View AllFirst1 of 7Last

Academic Institution:

PeopleSoft University

+ -

Term:

2003 Fall

Semester

Primary Academic Program:

Liberal Arts Undergraduate

External Org ID:

000010092

Landmark College

Country:

USA

United States

Study Agreement:

MILANEXHNG

Milan Exchange Program

Start Date:

01/30/2005

31

End Date:

05/30/2005

31

External Study page

External Org ID (external organization ID)	Select the identification number of the external organization that is sponsoring the student's external study program.
Country	Select the country in which the external organization resides.
Study Agreement	Select the study agreement that describes the student's external study program.
Start Date and End Date	Enter the dates on which the student's external study program begins and ends.

Querying for Academic Level Differentials

Use the delivered public query `STDENT_TERM_ADMIT_LEVEL` to identify individuals with differences between their academic level on the admissions application, as defined on the Application Data page, and their academic level at term start, as seen on the Term Activation page. This query, which you can access through Query Manager, compares an individual's academic level in the Recruiting and Admissions table `ADM_APPL_DATA` to that same individual's academic level in the Student Records table `ACAD_PROG` through a view. If the values are different, the query captures these rows and displays them for you in Query Manager.

If the individual's academic level in the ACAD_PROG table is lower than the academic level in the ADM_APPL_DATA table and you want to increase the ACAD_PROG academic level, you must complete one of the following actions:

- Grant the student additional other credit units for a special course through the transfer credit process, provided that the student's academic program bases level and load determination on units.
- Grant the student additional terms in residence credit through the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on terms.

If the individual's academic level in the ACAD_PROG table is higher than the academic level in the ADM_APPL_DATA table and you want to decrease the ACAD_PROG academic level, you must complete one of the following actions:

- Enter a negative credit amount in the TC Units Adjustment field on the Terms in Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on units.
- Enter a negative terms in residence amount in the Transfer In Residence Terms field on the Terms In Residence page of the Term Activation component, provided that the student's academic program bases level and load determination on terms.

Chapter 31

Managing Enrollment and Validation Appointments

This chapter provides an overview of enrollment and validation appointments and discusses how to:

- Set up enrollment and validation appointments.
- Create student appointment blocks.
- Create enrollment and validation appointments.
- Assign enrollment and validation appointments in batch.
- Assign and maintain appointments for individual students.
- Create appointment communications in batch.
- View appointments through self service.

Understanding Enrollment and Validation Appointments

Enrollment appointments enable you to manage and prioritize class enrollment processing for your students. Student Records offers you the flexibility to assign enrollment appointments in mass through a process that you can run multiple times within the same term or to assign enrollment appointments on a student-by-student basis.

Validation appointments function similarly to enrollment appointments. If your institution has licensed PeopleSoft Campus Self Service, your students can use the self-service enrollment and academic planning functionality to store the classes in which they plan to enroll in a staging area, before they are allowed to enroll. They can then validate their selection against a subset of Enrollment Engine edits. So in essence, students can plan their schedules before they can enroll by choosing several combinations of classes and checking to see if the enrollments will be successful. When students validate their schedules, the system calls the Enrollment Engine. Therefore, it might be necessary to assign students appointments during which they can validate their schedules to prevent a prohibitively large number of students from accessing the system at the same time. The process for assigning validation appointments is the same as for assigning enrollment appointments.

To create enrollment or validation appointments:

1. If you want to assign validation appointments, you must select the Allow Validation check box and at least one edit option on the Enrollment page when you set up Student Records Self Service (Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment).

2. (Optional) Define on the Appointment Limits Table page all of the possible appointment limit IDs and their corresponding part-time and full-time maximum unit limits for each session of a term at your academic institution.
3. Define student appointment blocks on the Student Appointment Blocks page.
4. Define appointment blocks for enrollment appointments on the Enrollment Appointment page in the Appointment Table component.

An appointment block is a block of appointment numbers.
5. Define appointment blocks for validation appointments on the Validation Appointment page in the Appointment Table component.
6. Assign validation or enrollment appointments to students in batch by merging an appointment block, a student appointment block, and appointment limits on the Assign Appointments page, or assign a single student an enrollment or validation appointment on the Student Enrollment Appointment page.
7. Review and update the enrollment or validation appointments for individuals as necessary through the Student Enrollment Appointment page.

You can run the Assign Students Appointment process as many times as needed within the same term and session, either adding new appointments or deleting existing appointments. Each time you run the process, it produces a hardcopy report for you. When the Create Communications check box is selected, the process also populates the communication table, providing you with the option to generate enrollment appointment notification mailers for your students.

Note. Each time you run the process with the check box selected, the system puts a new entry in the communication table. Only use this option when you are sure your appointments are final.

Setting Up Enrollment and Validation Appointments

This section provides an overview of enrollment and validation appointment setup and discusses how to define enrollment appointment limits.

Understanding Enrollment and Validation Appointment Setup

This section discusses:

- The Validation feature.
- The Appointment Limit table.

The Validation Feature

To have access to the Validation feature, your institution must have:

- Licensed PeopleSoft Campus Self Service.

- Enabled the Validation feature on the Enrollment page when you set up Student Records Self Service.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Setting Up Student Records Self-Service," Defining Student Records Setup.

The Appointment Limit Table

Set up the Appointment Limit table if you want to be able to reuse appointment limits across terms and sessions. You do not need to set up the Appointment Limit table if:

- You want to define appointment limits each time you assign individual appointments.
- You want the Enrollment Engine to only enforce academic program term and session enrollment limits—set up on the Enrollment page in the Academic Program Table component—and you do not want to define limits specifically for the appointment.

When checking enrollment unit limits, the enrollment engine first checks the academic program's term limits. If the student meets the enrollment unit limits for the term, the enrollment engine checks the enrollment limits for the session, as defined on the Enrollment page of the Academic Program Table component, if units limits have been defined for the session. If the student meets the enrollment limit requirements for the session—or if no limits were defined for the session—the enrollment engine checks the enrollment unit limits for the appointment, if the open enrollment date has not been reached. Appointment enrollment unit limits only apply prior to the open enrollment period.

Page Used to Set Up Enrollment and Validation Appointments

Page Name	Definition Name	Navigation	Usage
Appointment Limits Table	SSR_APPT_LIMIT	Records and Enrollment, Term Processing, Appointments, Appointment Limits Table, Appointment Limits Table	Define appointment limit IDs and the full-time and part-time maximum unit limits for each session of a term at your academic institution. You are not required to use appointment limit IDs, but if you do use them, you should define a separate appointment limit ID for each group at your academic institution that has varied enrollment unit restrictions.

Defining Enrollment Appointment Limits

Access the Appointment Limits Table page (Records and Enrollment, Term Processing, Appointments, Appointment Limits Table, Appointment Limits Table).

Appointment Limits Table			
Academic Institution:	PSUNV PeopleSoft University		
Academic Career:	UGRD Undergraduate		
Find View All First ◀ 8 of 11 ▶ Last			
Appointment Limit ID	STND + -		
*Description	STND		
Full Time Max Total Units:	18.00	Part Time Max Total Units:	9.00
Full Time Max No GPA Units:	12.00	Part Time Max No GPA Units:	6.00
Full Time Max Audit Units:	6.00	Part Time Max Audit Units:	3.00
Full Time Max Wait List Units:	12.00	Part Time Max Wait List Units:	6.00
Include Wait List in Total:	☒		

Appointment Limits Table page

Appointment Limit ID	Enter an appointment limit ID for every group at your academic institution that has varied enrollment unit restrictions. For example, each appointment limit ID that you define might have different full-time and part-time maximum and minimum units.
Full Time Max Total Units and Part Time Max Total Units	Enter the maximum number of units that a full-time and part-time student can enroll in during the specified enrollment appointment.
Full Time Max No GPA Units (full time maximum number grade point average units) and Part Time Max No GPA Units (part time maximum number grade point average units)	Enter the maximum number of units that a full-time and part-time student can enroll in with a non-GPA grading basis during the specified enrollment appointment.
Full Time Max Audit Units and Part Time Max Audit Units	Enter the maximum number of units that a full-time and part-time student can audit during the specified enrollment appointment.
Full Time Max Wait List Units and Part Time Max Wait List Units	Enter the maximum number of wait-list units that a full-time and part-time student can take during the specified enrollment appointment.

Include Wait List in Total

If you select this check box, the enrollment engine includes wait listed units towards the appointment maximum.

For example: A student has an appointment maximum unit limit of 18 and a maximum wait list unit limit of 12. The student is enrolled in 6 units and wait listed in 6 units. If the check box is selected, the student can enroll and/or wait list in an additional 6 units only, because the 6 wait listed units are applied to the overall limit of 18.

Example

For example, the registrar at PSUNV wants to create enrollment appointments on a ranking basis: seniors with a higher GPA enroll first, then seniors with a lower GPA. This same pattern works down to the freshman level. Graduate students can enroll any time. In addition, PSUNV limits the number of units in which a freshman can enroll. All other undergraduates require the same unit limit.

At least two appointment limit codes are required to represent the variable maximum units. In our example, it is not necessary to create an appointment code for graduate students because they can enroll at any time *and* because we have set the open enrollment date early enough on the Session Table page for the graduate academic career. Thus, we would create one appointment limit ID for freshman that specifies the appropriate unit limits, and a second appointment limit ID for all other undergraduates that specifies the appropriate unit limits. The mass enrollment appointment process handles the GPA ranking.

Creating Student Appointment Blocks

This section provides an overview of student appointment blocks and discusses how to

- Define student appointment blocks.
- Define processing priorities for student appointment blocks.

Understanding Student Appointment Blocks

When you define a student appointment block you are selecting criteria—such as academic career, academic program, cumulative GPA, and academic level—that will constitute a particular population of your student body for whom you want to assign enrollment or validation appointments. For example, you might want to assign appointments based solely on academic level, so your freshmen, sophomore, junior, and seniors have different appointments, or you might want to assign particular appointments to all senior undergraduate honors students with a cumulative GPA of 3.5 or better. You can define as many appointment blocks as you want on the Student Appointment Block page and reuse them term after term.

You can also create a custom student appointment block by selecting specific student IDs for the block.

You use student appointment blocks when assigning appointments in batch on the Assign Appointments page. On this page, you select an appointment block—created on the Enrollment Appointment or Validation Appointment pages—and then you select a student appointment block. The Assign Students Appointment process assigns the appointment numbers from the appointment block to the students who fit the criteria of the student appointment block. The processing priorities that you define on the Processing Priorities page for the student appointment block determine the order in which the system assigns students appointment numbers.

Pages Used to Create Student Appointment Blocks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Appointment Block	SSR_APPT_STDT_BLK	Records and Enrollment, Term Processing, Appointments, Student Appointment Block, Student Appointment Block	Define a student appointment block to be used when assigning appointments to students using the Assign Students Appointment process on the Assign Appointments page.
Add Programs	SSR_APPT_STDT_SEC	Click the Add Programs link on the Student Appointment Block page.	Add additional academic programs to the student appointment block.
Processing Priorities	SSR_APPT_STDT_PRIO	Records and Enrollment, Term Processing, Appointments, Student Appointment Block, Processing Priorities	Define ranking priorities for the student appointment block. The Assign Appointment process obeys these rankings when assigning enrollment appointments to students.

Defining Student Appointment Blocks

Access the Student Appointment Block page (Records and Enrollment, Term Processing, Appointments, Student Appointment Block, Student Appointment Block).

Student Appointment Block		Processing Priorities	
Academic Institution:	PSUNV	PeopleSoft University	
Academic Career:	UGRD	Undergraduate	
Find View All First 2 of 2 Last			
*Student Appointment Block:	FRESHM + -		
*Description:	Freshmen		
☐ Use Custom Selection			
Academic Program:	LAU	Liberal Arts Undergraduate	Add Programs
Academic Level - Projected:			
Academic Level - Term Start:	10	Freshman	
Academic Level - Term End:			
Student Group:			
Cumulative GPA From:			
Cumulative GPA To:			
Cumulative Units From:	1.00		
Cumulative Units To:	20.00		
☐ Include in Progress Units			
Term:	0450	2001 Fall	
Get # Students in Block	Students in Block for Term	18	

Student Appointment Block page

Student Appointment Block and Description

Enter a name, up to six characters, and a description for this student appointment block.

Use Custom Selection

Select this check box if you want to create this student appointment block by selecting individual student IDs. The ID field appears.

ID

Add individual students, by ID, to this student appointment block. All students within this academic career are available.

Academic Program

Select an academic program to limit this student appointment block to students who are active in this academic program. If you do not select an academic program, the available options in the academic level fields includes all levels for all programs in this career. This enables you to select all freshman in this career, for instance, regardless of their academic programs.

Add Programs	Select to choose particular programs for this student appointment block. The Add Programs page appears. When you add programs, the academic level fields will include all of the levels for every program that you select.
	Note. All academic programs might not contain all the same academic levels. When selecting multiple programs and levels for an appointment block, be sure to validate that the expected population was included in your block.
Academic Level - Projected	Select a projected academic level to limit this student appointment block to students with this projected academic level. Only the levels for the academic program that you selected are available. If no academic program is selected, then all levels for all programs within this career are available. If multiple academic programs are selected, all levels for all of the selected programs are available.
Academic Level - Term Start	Select a value to limit this student appointment block to students who are assigned this academic level at the start of the term. Only the levels for the academic program that you selected are available. If no academic program is selected, then all levels for all programs within this career are available. If multiple academic programs are selected, all levels for all of the selected programs are available.
Academic Level - Term End	Select a value to limit this student appointment block to students who are assigned this academic level at the end of the term. Only the levels for the academic program that you selected are available. If no academic program is selected, then all levels for all programs within this career are available. If multiple academic programs are selected, all levels for all of the selected programs are available.
Student Group	Select a student group to limit this student appointment block to students who are assigned to this student group. Assign students to student groups on the Student Group page.
Cumulative GPA From	Enter a value to limit this student appointment block to students who have at least this cumulative GPA on the CUM_GPA table.
Cumulative GPA To	Enter a value to limit this student appointment block to students who have up to this cumulative GPA on the CUM_GPA table.
Cumulative Units From	Enter a value to limit this student appointment block to students who have at least this amount of cumulative units on the TOT_CUMULATIVE table. When you navigate out of this field the Include in Progress Units check box appears.
Cumulative Units To	Enter a value to limit this student appointment block to students who have up to this amount of cumulative units on the TOT_CUMULATIVE table. When you navigate out of this field the Include in Progress Units check box appears.

- Include in Progress Units**

Select to include in progress units in the cumulative unit totals. Selecting this check box adds the TOT_INPROG_GPA and TOT_INPROG_NOGPA records to the calculation.
- Term**

Select a term to determine how many students fit this student appointment block criteria for a specific term.
- Get # Students in Block**

Click to run an ad hoc query to determine how many students fit this student appointment block for the selected term. This functionality is available to assist you in assigning appointments appropriately.

Defining Processing Priorities for Student Appointment Blocks

Access the Processing Priorities page (Records and Enrollment, Term Processing, Appointments, Student Appointment Block, Processing Priorities).

Student Appointment Block

Processing Priorities

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Find | View All

First 1 of 1 Last

Student Appointment Block: FRESHM Freshmen

Priority Ranking 1: Cumulative GPA

Priority Ranking 2: Units Completed

Priority Ranking 3: Academic Level - Projected

Processing Priorities page

Priority Ranking 1, Priority Ranking 2, and Priority Ranking 3

Define ranking priorities for this student appointment block. The Assign Appointment process obeys these rankings when assigning enrollment appointments to students. You can override these values on the Assign Appointments page. Select from:

Units Completed: The Assign Students Appointment process uses a student's total cumulative units (TOT_CUMULATIVE) as found on the student's career term record (STDNT_CAR_TERM). This includes a student's total transfer credit (TOT_TRNSFR), total other credit (TOT_OTHER), and total test score credit (TOT_TEST_CREDIT).

Cumulative GPA: The Assign Students Appointment process uses a student's total cumulative GPA (CUM_GPA) as found on the student's career term record. Inclusion of transfer credit, test credit, and other credit depend on how your institution sets up these various types of credit.

Academic Level - Projected: The Assign Students Appointment process uses a student's projected academic level as found on the student's career term record.

Academic Level - Term End: The Assign Students Appointment process uses a student's academic level at term end as found on the student's career term record.

Academic Level - Term Start: The Assign Students Appointment process uses a student's academic level at term start as found on the student's career term record.

If you leave these fields empty, or when multiple students are ranked the same, such as when multiple students have the same cumulative GPA, the system sorts those students by ID. A simple randomization feature loads the students into a temporary table and randomly assigns them a sequential number. Then, the system assigns the students appointments based on their number. This prevents a student from receiving an undesirable appointment every term based on his or her ID.

Creating Enrollment and Validation Appointments

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

- Select an appointment control session.
- Create enrollment appointment blocks.
- Create validation appointments.

Understanding Enrollment and Validation Appointments

An appointment consists of an appointment number, a start and end date, and a start and end time. In Student Records, appointments are organized into appointment blocks. An appointment block is a group of appointments. Because you can define multiple appointment blocks you can set up a variety of appointment types. For example, you can create one block with many appointments in 15 minute increments, and another with appointments in hourly increments. And you can create another block that contains appointments with varying lengths of time. You can also create multiple appointment blocks to allow some or all of the same students to have more than one appointment.

To create an appointment block you can manually enter appointment numbers, dates, and times, or you can use a variety of criteria to generate appointments in batch. We provide functionality that enables you an immense amount of flexibility and control in defining when appointments will begin and end, and how long they will last. Additionally, you can easily define the maximum number of students in each appointment and you can see how many students are actually assigned to a particular appointment. The system updates the number of students actually assigned to an appointment when the Assign Students Appointment process assigns an appointment to a student, when you assign an appointment to an individual student on the Student Enrollment Appointment page, or when you delete a student appointment.

You create validation appointments the same way that you create enrollment appointments. Like enrollment appointments, validation appointments use appointment blocks, and you can create appointments in batch using the flexible start, end, and number of students per appointment criteria, or manually. The Validation Appointment page only appears if you have enabled the Validation feature on the Self Service Options page in the Academic Career Table component.

You create appointment blocks by session. You can reuse the appointment blocks that you created for one session for another session by selecting the first session as the appointment control session. When you select an appointment control session, the Enrollment Appointment and Validation Appointment pages become unavailable for that session.

Pages Used to Create Enrollment and Validation Appointments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Appointment Table	SSR_APPT_TBL_HDR	Records and Enrollment, Term Processing, Appointments, Appointment Table, Appointment Table	Set an appointment control session, if applicable, and indicate if you want to display enrollment and validation appointments in self service.

Page Name	Definition Name	Navigation	Usage
Enrollment Appointments	APPOINTMENT_TBL	Records and Enrollment, Term Processing, Appointments, Appointment Table, Enrollment Appointments	Define enrollment appointments, by appointment block, for the session. For each enrollment appointment, define the valid date and time ranges, length of appointments, and the number of students allowed per appointment. Regardless of whether you decide to assign appointments manually or through the Assign Students Appointment process, you must create the parameters of each appointment ID on this page.
Validation Appointments	SSR_VALIDAT_TBL	Records and Enrollment, Term Processing, Appointments, Appointment Table, Validation Appointments	Define validation appointments, by appointment block, for the session. For each validation appointment, define the valid date and time ranges, length of appointments, and the number of students allowed per appointment. This page is available if you selected the Enable Validation Feature check box on the Self Service Options page for this academic career.

Selecting an Appointment Control Session

Access the Appointment Table page (Records and Enrollment, Term Processing, Appointments, Appointment Table, Appointment Table).

Appointment Table		Enrollment Appointments		Validation Appointments	
Academic Institution:	PSUNV	PeopleSoft University			
Academic Career:	UGRD	Undergraduate			
Term:	0450	2001 Fall			
Find View All First ◀ 1 of 5 ▶ Last					
Session:	1	Regular Academic Session			
Appointment Control Session:					
Display in Self Service	☒ Enrollment Appointments ☐ Validation Appointments				
Session Dates					
Session Beginning Date:	08/20/2001	Session End Date:	12/21/2001		
First Date to Enroll:	04/01/2001	Last Date to Enroll:			
Open Enrollment Date:	07/01/2001				

Appointment Table page

Appointment Control Session Enter a session to which you want to point this session's appointment information. This enables a student to register in both sessions with a single appointment. For example, by pointing the appointment control session for a 12-week session and a 6-week session to a regular session, the appointment information defined for the regular session becomes valid for both the 12-week and 6-week sessions. When you select an appointment control session, the Enrollment Appointment and Validation Appointment pages for this session becomes unavailable for edit.

Note. This field is only available for entry if this session has no students assigned to it. If no students are assigned to the session for which you are setting an appointment control session value, the appointments from the session are deleted.

Enrollment Appointments Select this check box if you want the system to display the enrollment appointments for this session in self-service pages. Clear this check box if you want to add and delete appointments and test the results of different enrollment appointment criteria before enrollment appointments are visible in self-service pages.

Validation Appointments

Select this check box if you want the system to display the validation appointments for this session in self service. Clear this check box if you want to add and delete appointments and test the results of different validation appointment criteria before enrollment appointments are visible in self service.

This field is available if you selected the Enable Validation Feature check box on the Self Service Options page for this academic career.

Session Dates

These dates appear as defaults from the Session Table page. They appear here to assist you when assigning appointment date ranges on the Enrollment Appointments page.

Note. Appointment start and end dates must be within the first day and last day to enroll date range set up on the Session Table page.

Creating Enrollment Appointment Blocks

Access the Enrollment Appointments page (Records and Enrollment, Term Processing, Appointments, Appointment Table, Enrollment Appointments).

Appointment Table

Enrollment Appointments

Validation Appointments

Academic Institution:

PSUNV

PeopleSoft University

Academic Career:

UGRD

Undergraduate

Term:

0450

2001 Fall

Find

View All

First

1 of 5

Last

Session:

1

Regular Academic Session

Appointment Blocks

Find

View All

First

1 of 1

Last

Appointment Block:

000001

*Description:

000001

+

-

▼ Create Appointments

Start with Appointment Nbr:

Appointments Start - Date/Time Range

Appointment Start Date:

Appointment Start time:

Appointment End Date:

Appointment End Time:

Appointments Start Every

Length

☒ Minutes

☐ Hours

☐ Days

Appointments End

☒ When The Next Appt Starts

☐ All Last Same Length of Time

☐ All End at the Same Time

Number of Students per Appt:

Create Appointments

Enrollment Appointments page (1 of 2)

Appointments							
				Customize	Find	View All	
				First	1-10 of 25	Last	
Appt Nbr	*Start Date		*Start Time	*End Date		*End Time	Number of Students per Appt
0001	03/10/2001	31	8:00AM	09/01/2001	31	8:00PM	1
0002	03/10/2001	31	8:30AM	09/01/2001	31	9:00AM	
0003	03/10/2001	31	9:00AM	09/01/2001	31	9:30AM	
0004	03/10/2001	31	9:30AM	09/01/2001	31	10:00AM	
0005	03/10/2001	31	10:00AM	09/01/2001	31	10:30AM	
0006	03/10/2001	31	10:30AM	09/01/2001	31	11:00AM	
0007	03/10/2001	31	11:00AM	09/01/2001	31	11:30AM	
0008	03/10/2001	31	11:30AM	09/01/2001	31	12:00PM	
0009	03/10/2001	31	12:00PM	09/01/2001	31	12:30PM	
0010	03/10/2001	31	12:30PM	09/01/2001	31	1:00PM	

Enrollment Appointments page (2 of 2)

Appointment Blocks

Appointment Block

Enter a name or code for this appointment block. An appointment block is a group of appointments. You can define one or several appointment blocks for a session. For example, you can define one appointment block for all student appointments in a session, or you can define one appointment block that contains appointments in 15 minute increments, while another might have appointments in hourly increments. Then, you can create one appointment block that has varying lengths of time. You can also set up multiple appointment blocks to allow the same block of students to have more than one appointment. Appointment block is now a key on the Appointment table.

When you run the Assign Students Appointment process (SRAPPT.sqr), you merge a student appointment block with this appointment block. Also, when you assign individual students to appointments on the Student Enrollment Appointment page, you can select appointments by appointment block.

Create Appointments

Start with Appointment Nbr (start with appointment number)

Indicate to the system where you want to start the appointment numbers in this appointment block. You can enter any numerical value. This enables you to segment appointment numbers if you want to leave gaps that can be filled later. If no value is entered, the system starts the appointment numbers with the next available number.

Appointments Start - Date/Time Range

Appointment Start Date and Appointment End Date Enter a range of dates in which your appointments can start. For example, if you enter 08/01/2005 in the Appointment Start Date field and 09/01/2005 in the Appointment End Date field, the first appointment in the block will start on 08/01/2005, and the last appointment in the block will start on 09/01/2005. Appointments might end on a later date than 09/01/2005, but they will not start later than that date.

The appointment start and end dates will be edited against the first date and last date to enroll for the session. If the date being added is not within the range, an error message will appear.

Appointment Start Time and Appointment End Time Enter a range of times at which you want your appointments to start. For example, if you enter a start of 8:00 a.m. and an end time 5:30 p.m., the first appointment of the day will start at 8:00 a.m., and the last appointment of the day will start no later than 5:30 p.m. Appointments might end later than 5:30 p.m., but they will not start later than that time.

Appointments Start Every

Length, Minutes, Hours, and Days Enter the length of time between the start time for each appointment. For example, if you enter 30 minutes, then appointments will start in 30 minute increments.

Appointments End

When The Next Appt Starts (when the next appointment starts) Select to have the system schedule appointments immediately following one another. For example, if one appointment ends at 9:25 a.m., the next appointment would start at 9:25 a.m.

All Last Same Length of Time Select to manually enter the length of time that you want each appointment to last.

Length, Minutes, Hours, and Days These fields become available when you select the All Last Same Length of Time option. Enter the length of time that you want appointments to last.

All End at the Same Time Select to indicate a specific date and time that you want all appointments in this appointment block to end. The End Date and End Time fields appear.

End Date This field becomes available when you select the All End at the Same Time option. Enter the date on which you want all appointments in this appointment block to end.

End Time This field becomes available when you select the All End at the Same Time option. Enter the time at which you want all appointments in this appointment block to end.

Additional Elements

Number of Students per Appt (number of students per appointment)	Enter how many students you want assigned to each appointment. You can change this for individual appointments in the Number of Students per Appt field.
Create Appointments	Click to create enrollment appointments in batch based on the criteria you defined.

Appointments

The system populates this grid when you click the Create Appointments button. You can also manually add and delete appointments here.

Note. You cannot delete an appointment in which students are already assigned.

Appt Nbr (appointment number)	The system starts the appointment numbers with the value you entered in the Start with Appointment Nbr field. You can override this value. If no value is entered in the Start with Appointment Nbr field, the system will start the appointment numbers with the next available number. The system assumes appointments are assigned in numerical order. Therefore, appointment 0002 begins after appointment 0001. Through the Assign Appointments and Student Enrollment Appointment pages, you can assign appointment numbers to students.
Number of Students per Appt (number of students per appointment)	When you create appointments in batch, The system populates this value based on the value you entered in the Number of Students per Appt field in the Create Appointments group box. You can change this value here.
Number of Student Assigned	The number of students actually assigned to this appointment ID appears here. The system updates this number when a student appointment is deleted or when a student is assigned an appointment in batch on the Assign Appointments page or individually on the Student Enrollment Appointment page.

Creating Validation Appointments

Access the Validation Appointments page (Records and Enrollment, Term Processing, Appointments, Appointment Table, Validation Appointments).

Appointment Table		Enrollment Appointments		Validation Appointments															
Academic Institution:	PSUNV	PeopleSoft University																	
Academic Career:	UGRD	Undergraduate																	
Term:	0450	2001 Fall																	
Find View All First 1 of 5 Last																			
Session:	1	Regular Academic Session																	
Validation Appointments Find View All First 1 of 1 Last																			
*Appointment Block:		*Description:																	
▼ Create Appointments Start with Appointment Nbr: Appointments Start - Date/Time Range Appointment Start Date: Appointment Start time: Appointment End Date: Appointment End Time: Appointments Start Every Length Minutes Hours Days Appointments End When The Next Appt Starts All Last Same Length of Time All End at the Same Time Number of Students per Appt: Create Appointments																			
Appointments Customize Find View All First 1 of 1 Last <table border="1"> <thead> <tr> <th>*Appt Nbr</th> <th>*Start Date</th> <th>*Start Time</th> <th>*End Date</th> <th>*End Time</th> <th>Number of Students per Appt</th> <th>Number of Students Assigned</th> </tr> </thead> <tbody> <tr> <td>0001</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						*Appt Nbr	*Start Date	*Start Time	*End Date	*End Time	Number of Students per Appt	Number of Students Assigned	0001						
*Appt Nbr	*Start Date	*Start Time	*End Date	*End Time	Number of Students per Appt	Number of Students Assigned													
0001																			

Validation Appointments page

Create validation appointments the same way that you create enrollment appointments. This page is available if you selected the Enable Validation Feature check box on the Self Service Options page for this academic career.

See Also

Chapter 31, "Managing Enrollment and Validation Appointments," Creating Enrollment Appointment Blocks, page 728

Assigning Enrollment and Validation Appointments in Batch

This section provides an overview of assigning appointments in batch, lists prerequisites, and discusses how to assign appointments in batch.

Understanding Assigning Appointments in Batch

The Assign Students Appointment process (SRAPPT.sqr) assigns or deletes enrollment or validation appointments in batch for a career, term, and session. The process:

1. Identifies the students that fit the criteria of the student appointment block.
2. Ranks the students according to the priority rankings set up on the student appointment block, or, based on the override rankings selected on the Assign Appointments page.
3. Ranks the students further, if necessary, based on a simple randomization feature that loads the student IDs into a temporary table and then randomly assigns them a number.
4. Assigns the students, based on their ranking, an appointment number and unit limit information.

The process stores this data on the Student Appointment table (STDNT_ENRL_APPT).

If your institution has licensed PeopleSoft Campus Solutions Self Service, students can view their appointments online as soon as you assign them, so long as you have enabled appointments to be displayed in Campus Self Service on the Appointment Table page for this session.

Assigning or deleting appointments using the Assign Students Appointment process updates the Number of Students Assigned field for the assigned appointments on the Enrollment Appointments or Validation Appointments pages.

Prerequisites

The Assign Students Appointment process can create communications giving you the option to generate enrollment appointment notification mailers for your students. Each time you run the Assign Students Appointment process, with the Create Communications check box selected, it creates a new communication for the affected students. Before you run the Assign Students Appointment process, you must define enrollment appointment mailers on the communications tables. We deliver an example enrollment appointment mailer that you can use as a model.

Note. Select the Create Communications check box only if you are ready to create communications.

To set up an enrollment appointment mailer:

Note. The system uses the STRM Administrative function and the APPTMR communication key. You must define an appointment communication key in the STRM Administrative Function for your institutions.

1. In the Build Community - Communications menu, use the Standard Letters page to create a standard letter for the enrollment appointment mailer, such as an APP letter.

2. Use the Communication Context page to define a communication context for the enrollment appointment mailer, such as *APPT1*.

In the Communication Context Method group box, select in the Letter Code field the standard letter that you have defined for the enrollment appointment mailer, which in this example is *APP*.

3. Use the Communication Categories page to set up a communication category for Student Records, such as *SREC*.

In the Communication Context group box, insert a row for the communication context that you have defined for the enrollment appointment mailer, which in this example is *APPT1*.

4. Use the Communication Speed Keys page to set up the administrative function for the enrollment appointment mailer, such as *STRM*.

In this example, you would set the Category field to *SREC*, the Context field to *APPT1*, and the Letter Code field to *APP*. Alternatively, you can create appointment communications in batch by institution career and term after you have assigned all of your appointments through the Appointment Communications page.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Communications"

Pages Used to Assign Enrollment and Validation Appointments in Batch

Page Name	Definition Name	Navigation	Usage
Assign Appointments	SSR_RUNCTL_APPT	Records and Enrollment, Term Processing, Appointments, Assign Appointments, Assign Appointments	Define parameters for and run the Assign Students Appointment process to assign students to appointments in batch.
Assign Appointments - Search for an Appointment	SSR_RUNC_APPT_SEC	Click the Find Appointment From or Find Appointment To link on the Assign Appointments page.	Search for appointment IDs within the selected appointment block by start date, end date, start time, or end time.

Assigning Appointments in Batch

Access the Assign Appointments page (Records and Enrollment, Term Processing, Appointments, Assign Appointments, Assign Appointments).

Assign Appointments

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

***Academic Institution:** PSUNV PeopleSoft University

***Academic Career:** UGRD Undergraduate

***Term:** 0505 2003 Fall

***Process Mode:** Add Appointments

☒ **Create Communications**

Assign Appointments page (1 of 2)

Find | View All First 1 of 1 Last

***Session:** Regular Academic Session + -

☐ **Do not Allow Multiple Appts.**

Find | View All First 1 of 1 Last

***Student Appointment Block:** FRESHM Freshmen + -

☐ **Override Block Priorities**

Priority Ranking 1:

Priority Ranking 2:

Priority Ranking 3:

***Appointment Type:** Enrollment

☐ **Use Program Term/Session Limit**

Appointment Limit ID: 1 1

***Appointment Block:** RR RR

Appointment Number From: 0001 08/11/2003 8:00AM [Find Appointment From](#)

Appointment Number To: [Find Appointment To](#)

Assign Appointments page (2 of 2)

Academic Institution, Academic Career, and Term Enter the academic institution, academic career, and term for which you want to assign enrollment appointments to students.

Process Mode

Select *Add Appointments* to have the Assign Students Appointment process find students based on the criteria that you specify and assign them the selected appointments. Select *Delete Appointments* to have the Assign Students Appointment process find students based on the criteria that you specify and delete those students' appointments. Added and deleted appointments will be correctly reflected in the Number of Student Assigned field on the Enrollment Appointments page.

Note. Because the Process Mode field is on level one, deleting appointments deletes all appointments for all rows on this page. If you want to delete just one student appointment block, add that student appointment block to a new run control.

Create Communication

Select this check box to record appointment information to be able to later generate enrollment appointment notifications for students. When you select this check box, the Assign Students Appointments process populates the communication table with an administrative function of APP and records for each affected student the action of add or delete, the appointment type of enrollment or validation appointment, and the student block and appointment block.

See [Chapter 31, "Managing Enrollment and Validation Appointments," Creating Appointment Communications in Batch, page 743.](#)

Session

Select the session for which you want to assign enrollment appointments to students.

Do not Allow Multiple Appts
(do not allow multiple appointments)

Select this check box to prevent the system from assigning multiple appointments to a student who meets the criteria of multiple student appointment blocks.

Note. To ensure students receive the best appointment possible, organize your run control so that the most favorable student appointment block runs first.

Student Appointment Block

Select the student appointment block for which you want to create appointments. Define student appointment blocks on the Student Appointment Block page.

Override Block Priorities

Select this check box to override the priority ranking set up for the student appointment block on the Processing Priorities page.

Priority Ranking 1, Priority Ranking 2, and Priority Ranking 3

These fields become available when you select the Override Block Priorities check box. Use these fields to override the priority ranking set up for the student appointment block on the Processing Priorities page. The Assign Appointment process obeys these rankings when assigning enrollment appointments to students. Select from:

Units Completed: The Assign Students Appointment process uses a student's total cumulative units (TOT_CUMULATIVE) as found on the student's career term record (STDNT_CAR_TERM). This includes a student's total transfer credit (TOT_TRNSFR), total other credit (TOT_OTHER), and total test score credit (TOT_TEST_CREDIT).

Cumulative GPA: The Assign Students Appointment process uses a student's total cumulative GPA (CUM_GPA) as found on the student's career term record. Inclusion of transfer credit, test credit, and other credit depend on how your institution sets up these various types of credit.

Academic Level - Projected: The Assign Students Appointment process uses a student's projected academic level as found on the student's career term record.

Academic Level - Term End: The Assign Students Appointment process uses a student's academic level at term end as found on the student's career term record.

Academic Level - Term Start: The Assign Students Appointment process uses a student's academic level at term start as found on the student's career term record.

Appointment Type

Indicate whether the appointments you are assigning are enrollment or validation appointments.

Use Program Term/Session Limit

Select this check box if you want the Enrollment Engine to enforce term/session limits for the students you are assigning appointments based on the limits of the students' academic programs. You must select this check box or enter an appointment limit ID.

Appointment Limit ID

Assign an appointment limit ID to the students to whom you are assigning appointments. The Enrollment Engine enforces appointment limits set up for the appointment limit ID. Only those appointment limit IDs for this academic career appear in the search dialog.

You must select the Use Program Term/Session Limit check box or enter an appointment limit ID.

Appointment Block

Select the appointment block to which you want to assign students. Use the Appointment Table to create appointment blocks.

Appointment Number From

Select the appointment number within the specified range of appointment numbers to further narrow where you want the process to *begin* its assignment of appointments for students that meet the processing parameters of this row of the request.

- Appointment Number To** Select the appointment number within the specified range of appointment numbers to further narrow where you want the process to *end* its assignment of appointments for students that meet the processing parameters of this row of the request.
- Find Appointment From and Find Appointment To** Click to search for appointments. The Assign Appointments - Search for an Appointment page appears.

Run the Assign Students Appointment process as needed. The process produces a hard-copy report for you that displays each student's appointment number, the time and date range of each appointment, the student's name, and the student's ID. The process also populates the communication table with students for whom you have generated appointments so that you have the option to generate enrollment appointment notification mailers to inform your students. The mailer contains the date, student's name and address, salutation, enrollment appointment information, and instruction about how the student can enroll in classes during appointment time. You can make changes to the mailer.

Assigning and Maintaining Appointments for Individual Students

This section discusses how to assign and maintain appointments for individual students.

Pages Used to Assign and Maintain Appointments for Individual Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Enrollment Appointment	STDNT_ENRL_APPT	Records and Enrollment, Term Processing, Appointments, Student Enrollment Appointment, Student Enrollment Appointment	Assign enrollment appointments on a student-by-student basis. You can also use this page after you've run the Assign Students Appointment process to verify that a student's appointments has indeed been scheduled and to edit a student's appointment as necessary.
Student Enrollment Appointment - Search for an Appointment	SSR_ENRL_APPT_SEC	Click the Find Appointment link on the Student Enrollment Appointment page.	Search for appointment IDs by start date, end date, start time, or end time and appointment block.

Assigning and Maintaining Appointments for Individual Students

Access the Student Enrollment Appointment page (Records and Enrollment, Term Processing, Appointments, Student Enrollment Appointment, Student Enrollment Appointment).

Student Enrollment Appointment

Maria Del Rosario SR13437
 Academic Career: Undergraduate PeopleSoft University
 Term: 2011 Spring

Session Limits Find | View All First 1 of 1 Last

Session: 1 Regular Academic Session + -

☐ Only Use Term Limits

☐ Override Maximum Units

Max Total Units: Max No GPA Units:
 Max Audit Units: Max Wait List Units:
 Max Total Courses:

Enrollment Appointments Find | View All First 1 of 1 Last

*Appt Block	*Appt Nbr	Start Date	Start Time	End Date	End Time	Find Appointment + -
DS001	0001	11/01/2010	12:00AM	11/13/2010	11:59PM	

Select Limits for Appointment

☐ Use Program Term/Session Limit

☐ Use Appointment Limit ID Limit ID:

☒ Set Maximum Units

Max Total Units: Max No GPA Units:
 Max Audit Units: Max Wait List Units:
 Include Wait List in Total: ☒

Validation Appointments Find | View All First 1 of 1 Last

*Appt Block	*Appt Nbr	Start Date	Start Time	End Date	End Time	Find Appointment + -

Student Enrollment Appointment page

Session Limits**Session**

Select the session for which you want to assign enrollment appointments to the student.

Only Use Term Limits

Select if you want the enrollment engine to use term unit limits (defined on the Enrollment page of the Academic Program Table component), rather than session unit limits (defined on the Session page of the Academic Program Table component). The enrollment engine still checks appointment limits, even if this check box is selected.

Override Maximum Units	Select to override the session unit limits set for the student's primary academic program of the enrollment term. When you select this check box, the system makes available the Max Total Units, Max Audit Units, Max No GPA Units, and Max Wait List Units fields and displays the values set on the Session page of the Academic Program Table component. You can then override the values for this student's enrollment appointment. If you are assigning a new enrollment appointment to the student and you want to use this override, you must first select this check box and save the page. Clear this check box to use the previously defined session unit limits set for the student's primary academic program of the enrollment term. Note. Selecting this check box does not override a student's term unit limits for the student's primary academic program within the enrollment term, as set on the Enrollment page of the Academic Program Table component.
Max Total Units	Enter the maximum number of units that the student can enroll in for all of the enrollment appointments within the specified session.
Max No GPA Units (maximum number grade point average units)	Enter the maximum number of units that the student can enroll in with a non-GPA grading basis for all of the enrollment appointments within the specified session.
Max Audit Units	Enter the maximum number of units that the student can take in audit status for all of the enrollment appointments within the specified session.
Max Wait List Units	Enter the maximum number of wait-list units that the student can take for all of the enrollment appointments within the specified session.
Include Wait List in Total	If you select this check box, the enrollment engine includes wait listed units towards the appointment maximum. For example: A student has an appointment maximum unit limit of 15 and a maximum wait list unit limit of 9. The student is enrolled in 6 units and wait listed in 6 units. If the check box is selected, the student can enroll and/or wait list in an additional 3 units only, because the 6 wait listed units are applied to the overall limit of 15.
Max Total Courses	By default, the system displays the maximum number of courses that this student can take for the specified session. The system determines this value according to the maximum courses that a student can take for the specified session <i>and</i> the term category of the specified term, as defined for the student's primary academic program for the specified term. Set total maximum course values by academic load for term category and session combinations within an academic program on the Course page in the Academic Program Table component. If you have cleared the Only Use Term Limits check box for the specified session on the Session Enrollment Limits page, this field is unavailable.

Enrollment Appointments

Appt Block (appointment block)	Enter an appointment block from which you want to assign an appointment. You can also search for an appointment by clicking the Find Appointment link.
Appt Nbr (appointment number)	Enter the appointment number that you want to assign to the student. You must enter a valid appointment number for the appointment block that you entered. You can also search for an appointment number by clicking the Find Appointment link. Define appointments on the Enrollment Appointments page in the Appointment Table component. The system displays the start and end dates and the start time of the enrollment appointment that you select.
Find Appointment	Click to search for an appointment by appointment block or by date and time. The Student Enrollment Appointment - Search for an Appointment page appears.

Select Limits for Appointment

Indicate how you want to enforce appointment limits for this individual.

Use Program Term/Session Limit	Select this option if you want the Enrollment Engine to enforce the enrollment limits of the term and session—set up on the Enrollment page in the Academic Program Table component—for the appointment limits.
Use Appointment Limit ID	Select this option if you want the Enrollment Engine to enforce the appointment limits set up for the appointment limit ID. When you select this option, the Limit ID field appears.
Limit ID	The field appears when you select the Use Appointment Limit ID option. Enter the appointment limit ID that you want to use to enforce appointment limits. Define appointment limit IDs on the Appointment Limit ID page.
Set Maximum Units	Select this option if you want to define appointment limits here. Although you can enter higher limits than those defined for the session and term, the Enrollment Engine still enforces the session and term limits. For example, if the maximum total units for the session is 18, and you enter 20 in the Max Total Units field on this page, the Enrollment Engine does not let this student enroll in more than 18 units.
Max Total Units	Enter the maximum number of units that the student can enroll in during this enrollment appointment.
Max No GPA Units	Enter the maximum number of units that the student can enroll in with a non-GPA grading basis during this enrollment appointment.
Max Audit Units	Enter the maximum number of units that the student can audit during this enrollment appointment.

Max Wait List Units	Enter the maximum number of wait-list units that the student can take during this enrollment appointment.

Validation Appointments

This group box appears if you select the Enable Validation Feature on the Self Service Options page for this academic career.

Appt Block (appointment block)	Enter an appointment block from which you want to assign an appointment. You can also search for an appointment by clicking the Find Appointment link.

Appt Nbr (appointment number)	Enter the appointment number that you want to assign to the student. You must enter a valid appointment number for the appointment block that you entered. You can also search for an appointment number by clicking the Find Appointment link. Define appointments on the Validation Appointments page in the Appointment Table component. The system displays the start and end dates and the start time of the validation appointment that you select.

Find Appointment	Click to search for an appointment by appointment block or by date and time. The Student Enrollment Appointment - Search for an Appointment page appears.

Creating Appointment Communications in Batch

This section lists prerequisites and discusses how to create appointment communications in batch.

Prerequisites

The Create Appts Communications process populates the communications tables, providing you with the option to generate enrollment appointment notification mailers for your students. Each time you run the Create Appts Communications process, it repopulates the communication tables with the newest enrollment appointment information for the affected students. Before you run this process, you must define enrollment appointment mailers on the communications tables. We deliver an example enrollment appointment mailer that you can use as a model.

Page Used to Create Appointment Communications in Batch

Page Name	Definition Name	Navigation	Usage
Appointment Communications	SSR_RNCTL_COM_APPT	Records and Enrollment, Term Processing, Appointments, Appointment Communications, Appointment Communications	Run the Create Appts Communications (SRAPCOMM.sqr) process to create appointment communications in batch.

Creating Appointment Communications in Batch

Access the Appointment Communications page (Records and Enrollment, Term Processing, Appointments, Appointment Communications, Appointment Communications).

Appointment Communications

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

Select

*Academic Institution: PSUNV PeopleSoft University

*Academic Career UGRD Undergraduate

*Term 0505 2003 Fall

Appointment Communications page

When you run the Create Appts Communications process, the process uses the administrative function STRM and populates the communication tables with the letter code APP for every student within the selected institution, career, and term who has been assigned an appointment. In addition to the letter code of APP, the process records for each affected student the action of add or delete, the appointment type of enrollment or validation appointment, and the student block and appointment block.

After you populate the communication tables, you can generate enrollment appointment notification mailers for students.

Viewing Appointments Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your students can view their enrollment and validation appointments directly over the web. Advisors can also view enrollment and validation appointment information over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Academic Advisement Self Service"

Chapter 32

Processing Class Enrollment Transactions

After you schedule classes for a term, activated students into that term, and assigned enrollment appointments, you are ready to enroll students into classes. Student Records has flexible and robust enrollment processing where all the rules that you have set up in your schedule of classes and course catalog come to fruition.

This chapter provides an overview of class enrollment processing and discusses how to:

- Process enrollment transactions through the Quick Enroll component.
- Process enrollment transactions through the Enrollment component.
- Process enrollment transactions through the Block Enrollment feature.
- Process enrollment transactions through the Enrollment Request component.
- Process enrollment transactions through self service.
- Post mass enrollment requests.

Understanding Class Enrollment Processing

This section discusses:

- Class enrollment processing.
- Enrollment request processing for drops.
- Date and time stamps on student enrollment records.

Important! Numerous common page elements are shared between the various enrollment components. We explain all page elements for the Quick Enroll component. For other enrollment components, however, we refer you back to the discussion of the Quick Enroll component for descriptions of these common elements. Therefore, a knowledge of the page elements in the Quick Enroll component is essential to understanding the functionality of the page elements in all enrollment components.

Class Enrollment Processing

The class enrollment processing tools in Student Records provides maximum flexibility when dealing with enrollment transactions and other enrollment-related activities. Five components and one self-service application, all of which post enrollment records to the same table (STDNT_ENRL), are available for you to process enrollment transactions.

You can process enrollment requests on a student-by-student basis through the Quick Enroll and Enrollment Request components. You can process enrollment requests for blocks of students and classes through the Block Enrollment component. Through the Mass Enrollment component, you can post a range of enrollment requests. Enrollment requests from all of these components go through the powerful enrollment engine during the posting process. The enrollment engine verifies that for every class requested, the student meets all rules for requisites, deadlines, permissions, and so on. Optionally, the enrollment engine also warns of potential repeats.

The Enrollment component, in contrast, bypasses the enrollment engine and all of its checkpoints, posting enrollment transactions directly to a student's enrollment record as soon as you save the data in the component. The Enrollment component is intended for use by only a select few power users at your academic institution and should not be made available to a wide user population.

If your academic institution has licensed PeopleSoft Campus Self Service, your students can also submit enrollment requests over the internet during their scheduled enrollment appointment times. These requests function the same as all other enrollment requests in your Student Administration system, writing data directly to your application tables.

When a user submits an enrollment request for an open entry/exit (OEE) class, the enrollment engine evaluates the student's primary academic program to verify that the academic program permits OEE enrollment. If the academic program does not permit OEE enrollment, the system returns an error message notifying the user that enrollment is not allowed in the chosen class. If the academic program does permit OEE enrollment, the enrollment engine then performs all of the existing edits as usual (such as class limits and requisite checks).

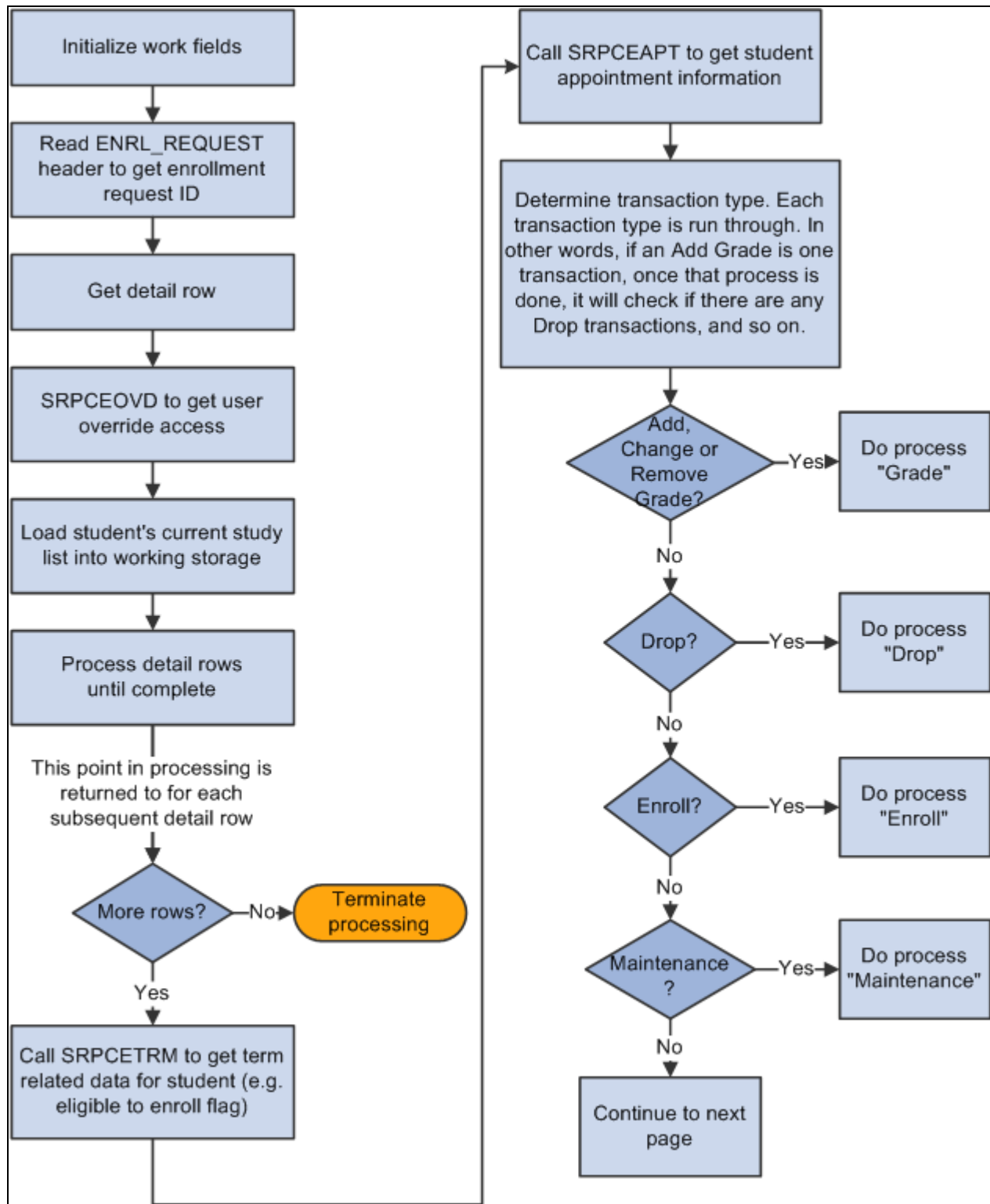
If the request successfully passes these edits, the enrollment process uses the OEE dynamic date rule assigned to the class to calculate a class end date and all the other dynamic calendar dates for the student. If no OEE dynamic date rule has been defined for the class, the enrollment process uses the rule established for the course offering. If no rule exists for the course offering, the request fails and the process returns an error message.

If the request is successful, you can view the dates calculated by the process using the academic calendar link on the Study List or by accessing the Student OEE Enroll Data page.

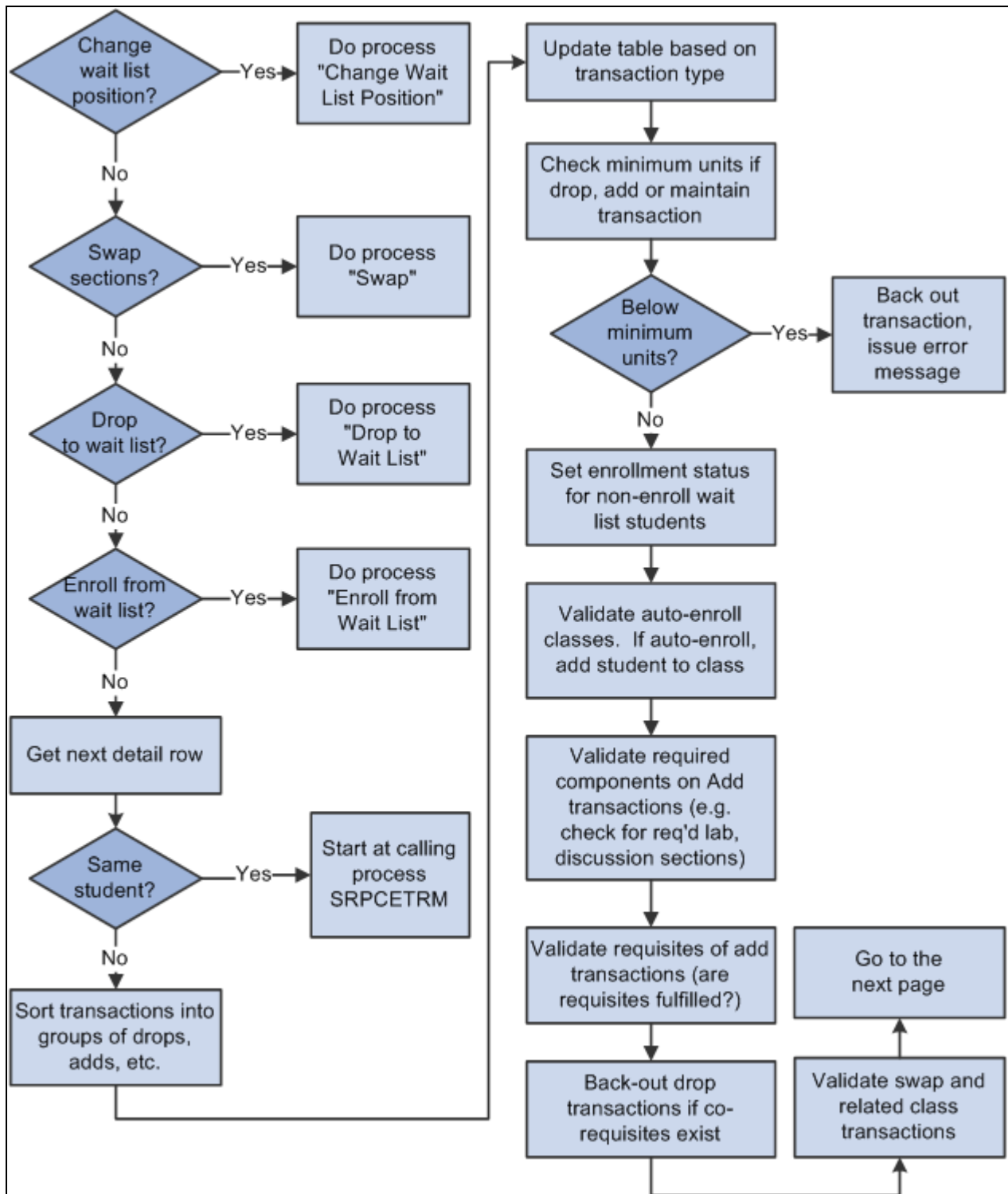
To submit an enrollment transaction for a student, the student must have a personal data record, have been activated in an academic program within the academic career to which the classes belong, and have been activated in the necessary term for that same academic career.

Diagram of Enrollment Engine Logic

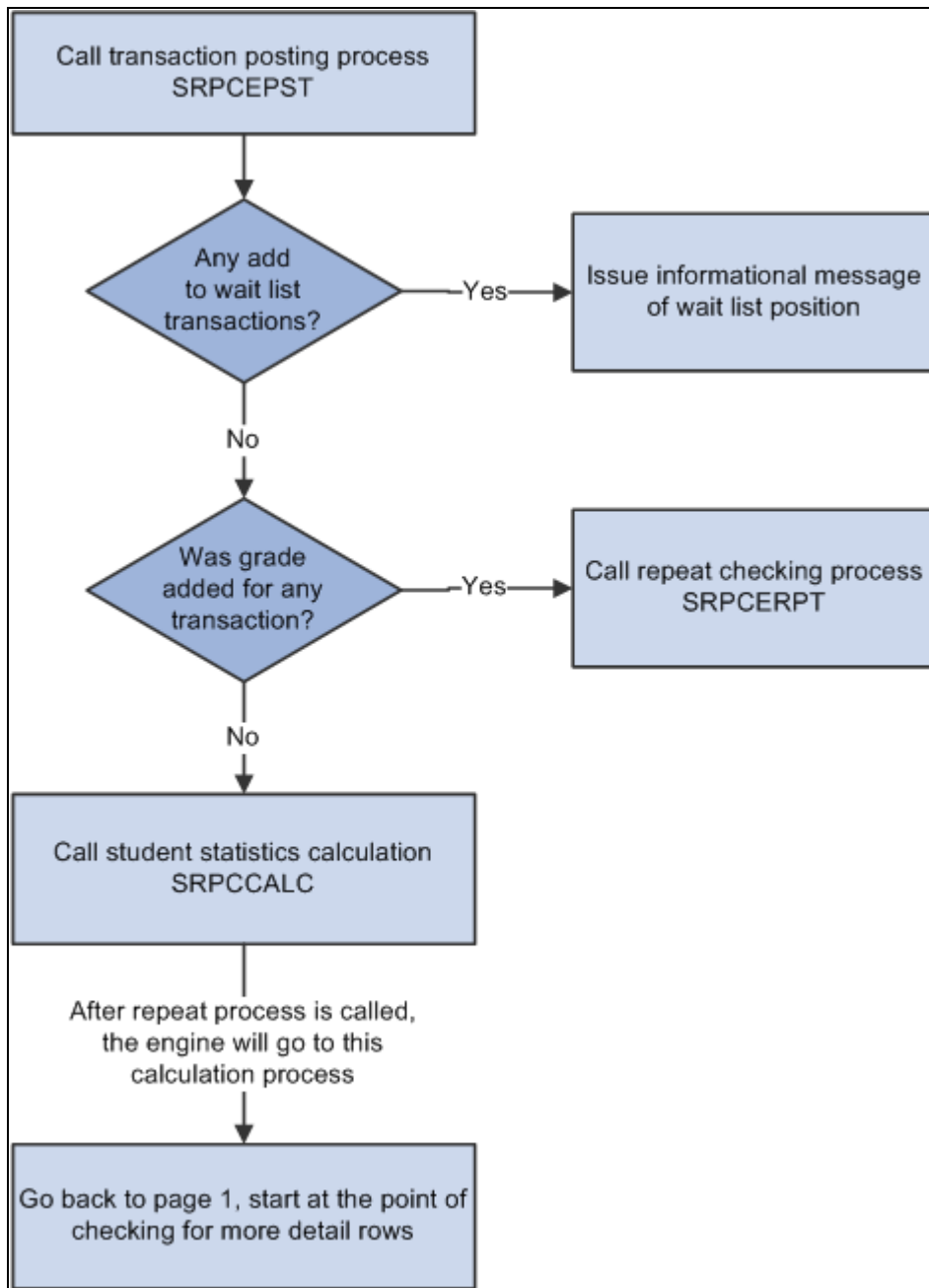
The following diagram shows a high-level process flow of the enrollment engine:



Enrollment engine logic (1 of 3)



Enrollment engine logic (2 of 3)



Enrollment engine logic (3 of 3)

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Dynamic Academic Calendars"

Enrollment Request Processing for Drops

When processing enrollment requests with an enrollment action of drop through the Quick Enroll, Enrollment Request, and Block Enroll components or self-service enrollment, the enrollment engine must determine the drop deadlines, reasons, grading bases, and grades with which to update the impacted student enrollment records (STDNT_ENRL).

The enrollment engine determines drop deadlines, grading bases, and grades differently depending on the class enrollment type (traditional, dynamic date, OEE).

When requesting to drop a traditional class enrollment, the enrollment engine:

- Determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines if a drop or withdrawal grade has been defined for the grading basis (based on the student's grading basis in the class) on the Grading Scheme Table page.

If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Session Calendar 2 page.

See [Chapter 12, "Setting Up Grading," Defining Grading Schemes, page 290](#).

When requesting to drop a dynamic date class enrollment, the enrollment engine:

- Determines the deadlines according to the values that the Dynamic Class Dates process calculates and displays on the Dynamic Class Data page.

If you have not calculated the academic calendar dates for the class, the enrollment engine determines the deadlines according to the values set on the Academic Calendar 2 page.

- Determines if a drop or withdrawal grade has been defined for the grading basis (based on the student's grading basis in the class) on the Grading Scheme Table page.
 - If there is no grade set on that page and you *have* calculated the academic calendar dates for this class, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component.

If there is no grading scheme and grade set on that page, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

- If there is no grade set on the Grading Scheme Table page and you *have not* calculated the academic calendar dates for this class, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

When requesting to drop an OEE class enrollment, the enrollment engine:

- Determines the deadline according to the values it calculates upon enrollment and displays on the Student Enroll OEE page.

If the deadlines have not been calculated, the request fails.

- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If there is no grading scheme and grade set on that page, the request fails.

Regardless of the class enrollment type, the enrollment engine determines the reason according to the enrollment action reason that you enter on the enrollment processing page. If you do not enter a value on the enrollment processing page, then, for drop transactions during the drop retain record period only, the enrollment engine uses the reason set on the Session Calendar 2 page. Otherwise, the engine assigns no reason.

If your institution wants to retain student enrollment records during the drop delete period, you can add an enrollment action reason to the drop and it will be retained subject to the time period associated with the enrollment action reason.

Note. The enrollment engine does not prevent enrollment request transactions after the drop deadlines. If you submit a request to drop after the latest drop deadline, the enrollment engine processes the request and generates a message that says that the drop was processed after the deadline.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Establishing Terms and Sessions," Defining Enrollment Action Reasons

Date and Time Stamps on Student Enrollment Records

Whenever you post an enrollment transaction that adds, drops, or updates a student enrollment record (STDNT_ENRL), the system populates the appropriate, enrolled, dropped, or updated row with date and time stamps based on the system date. These values are not viewable on any application pages. Student Financials uses these date and time stamps to correctly calculate adjustments in situations where your academic institution charges by term and adjusts by session. Classes are associated with sessions. The date and time stamp fields are as follows:

<i>Field</i>	<i>Description</i>
LAST_ENRL_DT_STMP	The date of the last enroll action or equivalent action.
LAST_ENRL_TM_STMP	The time of the last enroll action or equivalent action.
LAST_DROP_DT_STMP	The date of the last drop action or equivalent action.
LAST_DROP_TM_STMP	The time of the last drop action or equivalent action.

<i>Field</i>	<i>Description</i>
LAST_UPD_DT_STMP	The date of the last action.
LAST_UPD_TM_STMP	The time of the last action.

See Also

PeopleSoft Student Financials 9.0 PeopleBook, "Setting Up Tuition Controls, Criteria, Equations, and Waivers," Setting Up Adjustment Calendars

Processing Enrollment Transactions Through the Quick Enrollment Component

This section provides an overview of the Quick Enroll component and discusses how to:

- Add or update quick class enrollment requests.
- Inquire about enrollment request messages.

Understanding Quick Enroll

The Quick Admit component, Quick Enroll component, and Quick Admit process component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you'll use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick enrolled might be useful for various funnel reports.

The Quick Admit component and Quick Enroll component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes—all in a matter of minutes.

Important! The Recruiting and Admissions PeopleBook documentation for the Quick Admit use component and Quick Admit process component is essential reading for understanding how to quickly admit and enroll students. You should read that documentation to fully grasp the potential of the Quick Enroll component.

The Quick Enroll component enables you to enter, update, and post class enrollment requests for both new and continuing students on a student-by-student basis. The Quick Enroll component has the exact same functionality as the Enrollment Request component, using the same enrollment engine processing and performing the same edit checks. Transactions entered into the Quick Enroll component can be accessed through the Enrollment Request component and vice versa, giving you more flexibility and control over your enrollment requests.

Note that you cannot use the Quick Enroll component to view enrollment transactions processed through the Enrollment page because those transactions do not generate an enrollment request, nor can you view enrollment transaction processed through the Block Enrollment component because those transactions have more than one ID associated with the enrollment request. You can view the latter two enrollment sources only through their respective components.

When you access the Quick Enroll component, a dialog box prompts you to enter the key values of the transaction. The key values are:

ID	Select from a list of existing student IDs.
Academic Career	Select the academic career to which you want to add or update enrollment requests for the specified student. The system prompts you with only the academic careers in which the student is active. You can activate students in academic careers through either the Quick Admit component or the Student Program/Plan component.
Academic Institution	Select the academic institution in which you want to add or update enrollment requests for the specified student.
Term	Select the term for which you want to add or update enrollment requests for the specified student. The system displays only the terms in which the student is active for the academic career that you selected.
Enrollment Request ID	This identifies the enrollment request as unique from other enrollment requests. The Quick Enroll component uses enrollment request as a key to access transactions. In Add mode, this field is unavailable for edit because the system generates a unique enrollment request ID for you when you save the data in the Quick Enroll component. In other modes, select the enrollment request ID that you want to access.
OK	Click to open the component with the specified key values.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Adding and Updating Applications," Adding New Prospects and Applications with Quick Admit

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators"

Pages Used to Process Enrollment Transactions Through the Quick Enroll Component

Page Name	Definition Name	Navigation	Usage
Quick Enrollment	QUICK_ENROLL3	Records and Enrollment, Enroll Students, Quick Enroll a Student, Quick Enrollment	Add or update enrollment request transactions for both new and continuing students. The Quick Enroll component has the exact same functionality as the Enrollment Request component. Transactions that you process through the Quick Enroll component can also be accessed through the Enrollment Request component and vice versa.
Enrollment Message Log	ENRLREQ_MSGLOG_SBP	Click the Errors link or Messages link in the Status field on the Quick Enrollment page.	View error message text for a specific row in the enrollment request.

Adding or Updating Quick Enrollment Requests

Access the Quick Enrollment page (Records and Enrollment, Enroll Students, Quick Enroll a Student, Quick Enrollment).

Quick Enrollment

Request ID: 0000000000 **Ana Beck** **ID:** SR0400
Career: Undergrad **Institution:** PSU **Term:** 2003 Spr

Class Enrollment
Units and Grade
Other Class Info
General Overrides
Class Overrides

		*Action	Class Nbr		Section	Start Date		Academic Program	Related 1	Related 2
		Enroll	1620	Anthropolo 203	1L		Pending	LAU	1621	
		Enroll	1096	Engl Lit 166	1		Pending	LAU		

Quick Enrollment page - Class Enrollment tab

When you use this page for continuing students and a student has a positive or negative service indicator assigned to his or her record, the system displays the corresponding Service Indicator button at the top of the page. Click the button that appears to view the details of specific service indicators.

General Page Elements

Request ID

Identifies the enrollment request as unique from other enrollment requests. The Enrollment Request component uses an enrollment request as a key to access transactions. In Add mode, this field is unavailable for edit because the system generates a unique enrollment request ID for you when you save the data in the Enrollment Request component. In other modes, select the enrollment request ID upon accessing the component.

ID

The ID of the student for whom you are submitting the enrollment request.

Career

The academic career of the student for whom you are submitting the enrollment request.

Institution

The academic institution for which you are submitting the enrollment request.

Term

The term for which you are submitting the enrollment request.



Click the Show All Columns button to display all of the fields at the bottom of the page in a single, scrollable grid rather than in separate tabs.



Click the Show Tabs button to display all of the fields at the bottom of the page in separate tabs rather than a single, scrollable grid.

Submit

Click to process all nonposted rows of the enrollment request for the student. The enrollment engine performs validations as necessary at this time. If the enrollment engine encounters any errors, the system displays an enrollment request status of *Errors* on the corresponding row of the request. You can view the error messages in the appropriate row's Error Messages group box.

Note. You can also save the enrollment request and post groups of them on the Mass Enrollment page.

Class Enrollment Tab

Action

An enrollment action is the action performed on the enrollment record. The system by default sets the enrollment action for the request to *Enroll*, but you can override this default value. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Select from the following choices.

Add Grd (add grade): Select to add a grade to the student's enrollment record for the corresponding class.

Change Grd (change grade): Select to change a grade on the student's enrollment record for the corresponding class.

Chg WL Pos (change wait list position): Select to change the student's wait list position for the corresponding class.

Drop: Select to drop the student from the corresponding class.

Drop to WL (drop to wait list): Select to drop the student from the corresponding class and move the student to the wait list for that class.

Enroll: Select to enroll the student into the corresponding class.

Warning! Enrollment request transactions with an action value of *Add Grade* or *Change Grade*, are the only types of transactions that create Student Incomplete rows when you assign an Incomplete grade (as defined on the Academic Program Table—Incomplete page). If you use an action of *Enroll* and populate the grade with an incomplete grade, the system does not create a Student Incomplete row.

Norm Maint (normal maintenance): Select to update the student's enrollment record for the corresponding class in normal maintenance mode. Items available for update include grading basis, units, permission, course count, notes, requirement designation, repeat code, and instructor ID. You can use the normal maintenance action to update these items, rather than dropping the class and re-adding it with the new information.

Remove Grd (remove grade): Select to remove a grade from the student's enrollment record for the corresponding class.

Swap: Select to enable the student to swap the corresponding class in which he or she is enrolled for a different class. The *Change To* field becomes available for you to enter the new class section in which the student wants to enroll. You can also use this option to swap a student's enrollment from one related class section to another related class section. List the enrollment class section in both the *Class Nbr* (class number) and *Change To* fields, select a different related class, then post the enrollment transaction.

You cannot use the swap option to add or drop optional nonenrollment component sections. For example, if a student enrolls in a class section without designating the optional nonenrollment component section as a related class, then you cannot use the swap option to add the optional nonenrollment component section to the student's enrollment record. Instead, you must drop the student from the enrollment section, then process another enrollment request to add the student back into the enrollment section and also the optional nonenrollment component section. Likewise, if a student initially enrolls in both the enrollment section and the optional nonenrollment component section but wants to drop the optional nonenrollment component section altogether, you must drop the student from both sections and process another enrollment request to add the student back into the enrollment section only.

Class Nbr(class number)

If you are submitting a new enrollment transaction, enter the number of the class for the term. The system generates a class number when you schedule classes for a term. The class number also appears on the schedule of classes.



If you do not know the class number from the schedule of classes, click the Search button to view the Basic Class Search page, where you can search the schedule of classes for the class that you want to use for the enrollment transaction.

Change To

This field becomes available when you select an enrollment action of swap. Enter the number of the new class in which the student wants to be enrolled.

Class Description

The Class Description link becomes available after you enter a class number. The text for this link changes according to the title of the class that you selected. Click this link to access the Class Detail page, where you can view detail about the selected class.

Sect(section)

The system displays the section of the class that you selected.

Start Date

When a student attempts to enroll in a class scheduled within an OEE session, the system prompts you to enter a class start date. The date that a student starts an OEE class drives the open entry/open exit processing. A class start date is required for enrollment in OEE classes.

Status(unlabeled)

The system displays the status of the enrollment request.

Errors: The enrollment engine was unable to post the submitted enrollment request due to errors. Click this link to view the errors on the Enrollment Message Log page.

Pending: The enrollment request is pending submission for enrollment processing.

Messages: The enrollment engine was able to successfully post the enrollment request and has returned an informational message, such as the student's wait list position. Click this link to view the messages on the Enrollment Message Log page.

Success: The enrollment engine was able to successfully post the enrollment request.

Academic Program

Enter the student's academic program for this enrollment. This field appears if you select the Select Acad Prog During Enroll check box on the Academic Institution 5 page. This field is editable only if the student is active in more than one academic program for this term. In this case, the student's primary academic program for this term appears by default. You can change this value.

Related 1

If you have select an enrollment action of *Enroll* or *Swap*, the Related 1 and Related 2 fields become available for edit. If the class has a related class that is not an auto-enroll class, select that class number in this field. The values that appear are those associated sections that are scheduled for the class in the schedule of classes.

Related 2

If the class has another related class that is not an auto-enroll class, select that class number in this field.

Units and Grade Tab

Select the Units and Grade tab.

Quick Enrollment

Request ID: 0000000000

Ana Beck

ID: SR0400

Career: Undergrad

Institution: PSU

Term: 2003 Spr

Submit

Class Enrollment Units and Grade Other Class Info General Overrides Class Overrides										
			Unit Taken	Course Count	Grade Base	Grade Input	Repeat Code	Requirement Designation	Requirement Designation Option	RD Grade
+	-	Anthropolo 203	3.00	1.00	GRD Q	Q	Q		No	
+	-	Engl Lit 166	3.00	1.00	GRD Q	Q	Q		No	

Quick Enrollment page - Units and Grade tab

Unit Taken

The system uses units taken to calculate the transcript GPA and the enrollment load. The enrollment engine uses units taken to calculate the number of units a student can take in a term. Units taken appear by default from minimum units on the Class Associations page. If minimum units and maximum units are different on the Class Associations page, then the class is defined as having variable units. This field becomes active, and you must enter the number of units the student selects in this field.

Course Count

Indicates the value of the course towards a degree. Some institutions count courses towards a degree as well as units towards a degree. This field indicates the value of the course towards degree progress. This field appears by default from the Course Count field on the Class Associations page.

Grade Base

The system displays the grading basis for the class according to the value set in the corresponding field on the Class Components page of the Class Associations component. If your institution has set the grading basis of the class to *student option* on the Class Components page, then this field becomes available for edit and students can select their own grading basis. The system determines the prompt values according to the grading scheme for the academic career to which the course belongs, as defined on the Academic Career Table page. However, if your institution has mapped the grading basis from one academic career to another through a grading basis mapping rule (on the Career Pointer Exception Rule page), then the system determines the prompt values according to the grading basis attached to the mapping rule.

Grade Input

This is the final grade given to the student for the class. You can enter the grade here, or you can use the grade roster generator. When a grade is entered and posted, the system displays the grade here.

Note. Posting grades through the Quick Enroll, Enrollment Request, and Block Enrollment components automatically runs the repeat checking process if the Repeat Grade Check option is set to *all crse* (all courses) for the student's academic program.

Repeat Code

Select a repeat code for the enrollment transaction, if applicable.

Repeat codes work in conjunction with repeat rules to determine whether a repeated class violates your repeat policies. When the repeat checking process runs, it searches the student's enrollment history to find class enrollments with matching course IDs. When it finds a match, it determines whether the repeat is legal based on the repeat rules that you define.

As part of your repeat rule criteria, you can specify that any class enrollment into a course with a particular repeat code should be ignored by the repeat checking process. So, even if the class enrollment violates the total attempts criteria (for example) as defined in the repeat rule, the process does not consider it in violation of the rule, as long as the class enrollment contains the required repeat code.

For example, a repeat rule could specify that courses can be repeated only three times. However, you could stipulate that students can repeat the course more than three times if they have permission from the instructor. Thus, you could define a *PERM* (permission) repeat code and assign it to the class enrollment here. When the repeat checking process identifies this class enrollment as a repeat course, it looks to see if the *PERM* repeat code is assigned. If *PERM* is assigned, the repeat checking process does not consider this class enrollment in violation of the repeat rule.

You can also define your repeat rules so that the repeat checking process *requires* that a particular repeat code be assigned to a class enrollment for the repeated course to be evaluated in a particular repeat rule. For example, you could specify that any class enrollment with the *ILGL* repeat code assigned to it is in violation of the rule.

When the repeat checking process identifies a course that violates a repeat rule, the process assigns the class enrollment a repeat code. This repeat code determines how the class enrollment is treated in the student's academic statistics, such as whether the grade is used to calculate the student's grade point average. The repeat code that the repeat checking process assigns appears here.

Requirement Designation

Use this field to select a requirement designation for the class enrollment.

Requirement Designation Option

If there is a requirement designation specified for the corresponding row of the enrollment transaction *and* that requirement designation is at the student's option, select whether the student elects to take the requirement designation.

RD Grade (requirement designation grade)

You can enter the student requirement designation grade for the class enrollment on this page or through the grade roster. Usually, it is more convenient for you to enter grades for groups of students and classes through the grade roster. Values are *Satisfied* or *Not Satisfied*.

Other Class Info Tab

Select the Other Class Info tab.

Quick Enrollment

Request ID: 0000000000

Career: Undergrad

Requestor: Ana Beck

Institution: PSU

ID: SR0400

Term: 2003 Spr

Class Enrollment
Units and Grade
Other Class Info
General Overrides
Class Overrides

			Permission	Drop if Enroll		Ind Study Instructor	Action Reason	
		Anthropolo 203						Create Transcript Note
		Engl Lit 166						Create Transcript Note

Quick Enrollment page - Other Class Info tab

Permission

If the student has a general permission for enrollment, enter the number in this field. The system reserves the permission number for the student.

Drop if Enroll

The system displays this field only when the Action field is set to *Enroll*. Enter the class section that the student wants to drop. The system drops the student from this class section only if the student is successfully enrolled in the class section that the student is currently requesting. The system does not drop the student if he or she is put on a wait list. So if you select the Wait List Okay check box and the student is put on the wait list, the system will not drop the student. When you later run the Wait List process (SRPCWAIT) for the requested class section and the process successfully enrolls the student in that section, the Wait List process then drops the student from the class section that you specify in this field.

Ind Study Instructor
(independent study instructor)

If the Instructor Edit field on the Class Associations page is set to anything but *No Choice*, then this field becomes available for edit. Select the instructor ID responsible for the class if the class is an independent study.

Action Reason

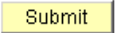
Select the enrollment action reason for the enrollment action. If you select a reason, the enrollment engine automatically retains the student enrollment record even if you are dropping a student from a class during the drop delete period. If you do not select a reason and you are dropping a student from a class during the drop retain record period, the enrollment engine uses the default reason set on the Session Calendar 2 page subject to the time period associated with that reason.

Create Transcript Note

Click to access the Transcript Note page, where you can enter a free-form text that prints on the student's transcript for the class enrollment.

General Overrides Tab

Select the General Overrides tab.

Quick Enrollment											
Request ID: 0000000000		Ana Beck		ID: SR0400							
Career: Undergrad		Institution: PSU		Term: 2003 Spr							
Class Enrollment Units and Grade Other Class Info General Overrides Class Overrides											
			Appointment	Unit Load	Time Conflict	Action Date	Action Dt	Requirement Designation	Career	Service Indicator	Requisites
		Anthropolo 203	☐	☒	☒	☐		☐	☐	☐	☒
		Engl Lit 166	☐	☒	☒	☐		☐	☐	☐	☒

Quick Enrollment page - General Overrides tab

Note. Only overrides that you are authorized to access are available.

Appointment

Select to override the student's enrollment appointment date, time, and maximum enrollment units. This enables you to enroll the student in the class on the corresponding row of the enrollment request, regardless of the student's enrollment appointment.

Unit Load

Select to have the enrollment engine skip all unit limit checks, including the unit load for the student's enrollment appointment, the term and session unit load, the term and session course count load, the term and session no grade point average (GPA) units, the term and session audit units, and the minimum unit enrollment check.

Time Conflict

Select to disable time conflict checking for class sections when you process the enrollment request.

Action Date

Select to override the action date. The Action Date field becomes available to edit.

Action Date

Select the date that you want to use as the action date for processing this enrollment transaction. The action date is the date that you process the corresponding row of the enrollment transaction. The system records the action date to track the date that you process information. By default, the system uses the current system date. When you are processing an enrollment request and you select to override the action date, this field becomes available for edit.

Requirement Designation

Select to override the requirement designation for the corresponding row of an enrollment request. The Requirement Designation field becomes available to edit.

Career

Select to override academic career pointers and career pointer exception rules for the student's academic career.

Service Indicator

Select to override service holds that have been placed on the student's record.

Requisites

Select to have the enrollment engine bypass requisite checking when you submit the corresponding row of an enrollment request for processing.

Class Overrides Tab

Select the Class Overrides tab.

Quick Enrollment

Request ID: 0000000000

Ana Beck

ID: SR0400



Career: Undergrad

Institution: PSU

Term: 2003 Spr

Submit

Class Enrollment

Units and Grade

Other Class Info

General Overrides

Class Overrides



			Closed Class	Class Links	Class Units	Grading Basis	Class Permission	Dynamic Dates	Wait List Okay	WaitList Pos
		Anthropolo 203	☐	☒	☐	☐	☐	☐	☒	WaitList Pos
		Engl Lit 166	☒	☐	☐	☐	☐	☐	☐	WaitList Pos

Quick Enrollment page - Class Overrides tab

Note. Only overrides that you are authorized to access are available.

- Closed Class

Select to indicate that the class is closed due to capacity size.
- Class Links

Select to allow students to add and drop class sections without having to do likewise for the required related component sections in a class association group, to allow students to enroll in a nonenrollment type section, and to allow multiple student enrollment in a course.
- Class Units

Select to override the *Units Taken* field value for both fixed and variable unit classes.

Grading Basis

Select to allow students to enroll into a class with a grading basis other than the one established for the class. The Grading Basis field becomes available for edit so that you can select a different grading basis for the class enrollment.

Note. If you select the Grading Basis check box on the Class Overrides tab when you add or change a grade using the Enrollment Request or Quick Enroll components, the STDNT_ENRL.OVRD_GRADING_BASIS is set to Y if the request posts successfully.

If you perform an enrollment action on an existing STDNT_ENRL row (that is, the action is not Enroll or Swap), the Grading Basis check box on the Class Overrides tab is automatically selected (ENRL_REQ_DETAIL.OVRD_GRADING_BASIS is set to Y), if the class has an overridden grading basis (STDNT_ENRL.OVRD_GRADING_BASIS = Y).

If the enrollment action is *Remove Grade*, the Grading Basis check box is not available for edit, regardless of a user's enrollment override security, to prevent a grade override being reversed.

For actions other than *Remove Grade*, if you clear the Grading Basis check box on the Class Overrides tab for a class that has an overridden grading basis, the STDNT_ENRL.OVRD_GRADING_BASIS is updated to N.

Class Permission

Select to override general permission and student-specific permission requirements, academic career pointers, and career pointer exception rules.

Note. A student with a valid class permission can override course consent, academic career pointers, career pointer exception rules, class capacity size, and requisite checking.

Wait List Okay

Select to allow the student to wait list into a class section even if the class section, combined section, and reserve capacity are full provided that space is available on the wait list and the last date to wait list has not passed.

Wait List Pos (wait list position)

Click this link to access the Wait List Position page, where you can view the student's position on the wait list. This link is available only for enrollment requests in which the student is already on the wait list for the specified class section.

(AUS) Australian Data Tab

Select the Australian Data tab.

Note. This tab is available only if you select the Australia DEST, HECS, Centrelink, TAC check box on Academic Institution 6 page.

Quick Enrollment				
Request ID:	0000000000	Joan Larsen	ID:	SRAUS4000
Career:	Undergrad	Institution:	PSAUS	Term: Aut 2005
Submit				
Class Enrollment Units and Grade Other Class Info General Overrides Class Overrides Australian Data				
	<u>Student Career Nbr</u>	<u>Liability Status</u>	<u>Cohort Year</u>	
+	- 0 🔍	110 🔍	2005 🔍	

Quick Enrollment page - Australian Data tab

Student Career Nbr (student career number) Select the student's career number.

Liability Status If the student has a liability status on the Term Activation - Loan Election page, the system enters that value here.
You can override that value for this course enrollment.

Cohort Year If the student has a cohort year on the Student Program/Plan - AUS Student Program page, the system enters that value here.

New Zealand Data Tab

Select the New Zealand Data Tab.

Note. This tab is available only if you select the New Zealand Catalog, SDR, EFTS, StudyLink check box on the Academic Institution 6 page.

Quick Enrollment				
Request ID:	0000000000	Ronald Bradley	ID:	SRNZL2001
Career:	Undergrad	Institution:	PSNZL	Term: Aut 2005
Submit				
Class Enrollment Units and Grade Other Class Info General Overrides Class Overrides New Zealand Data				
	<u>Funding Source</u>	<u>Course Classification</u>	<u>Funding Category</u>	<u>EFTS Factor</u>
+	- Full Fee Domestic Student ▼	03 🔍	B2 🔍	

Quick Enrollment page - New Zealand Data tab

Funding Source The system enters this value from the student's program.
Enter the funding source for the student's program on the Student Program page.

Course Classification	The system enters this value from the Acad Prog NZL (academic program New Zealand) page for course classifications defined with the type <i>Program</i>. For course classifications defined with the type <i>Course</i>, the system enters the value from the course catalog. Set up course classifications on the Course Classifications page. See Chapter 18, "(NZL) Setting Up Government Reporting," Defining Course Classifications, page 459.
Funding Category	If the student's program has a course classification type of <i>Program</i>, the first character on the Academic Program table is concatenated with the second character of the course catalog value, otherwise the course catalog value is used.
EFTS Factor	The system enters this value from the course catalog.
Go To Links	
View Enrollment Access	If your enrollment security is by enrollment access ID, click this link to access the Access to Enrollment Functions page, where you can view your security status for each enrollment function possibility.
Calculate Tuition	Click to access the Tuition Calculation page, where you can calculate tuition for the student. Tuition calculation is located within the Quick Enroll component because when you have changes to a student's academic status that can affect their charges for tuition and fees, you can perform the tuition calculation immediately without having to defer the task. However, tuition calculation is most likely performed by your Student Financials department and should be done by other users only if it concurs with your business rules. The student must be active in at least one career and at least one term before you can use this page, but the student does not necessarily have to be enrolled in any classes. It is possible to calculate tuition for a student if your term fees are set up to use anticipated (projected) billing units. Also, you must have defined appropriate term fees and at least one tuition group.
Study List	Click to access the Student Study List page, where you can view the student's class schedule for the specified term.
Enrollment Appointments	Click to access the Student Enrollment Appointment page, where you can view the student's enrollment appointments for the specified term.
Term/Session Withdrawal	Click to access the Term History component, where you can view all of a student's term statistics for each term of the student's academic career, withdraw the student from the specified term or session, and more.

See Also

Chapter 32, "Processing Class Enrollment Transactions," Adding Transcript Notes to Enrollment Requests, page 807

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Student Records," Setting Up Enrollment Security for Self-Service Enrollment

Chapter 31, "Managing Enrollment and Validation Appointments," Assigning and Maintaining Appointments for Individual Students, page 739

Chapter 34, "Using Enrollment-Related Processes," Processing Withdrawals and Cancellations, page 839

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Enrollment"

Chapter 33, "Working with Enrollment Request Messages," page 811

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees"

Chapter 23, "Performing Repeat Checking," page 533

Chapter 43, "Grading Students," page 1043

Chapter 24, "Managing the Schedule of Classes," Searching for Classes, page 613

Chapter 24, "Managing the Schedule of Classes," Understanding Class Permissions, page 592

Chapter 24, "Managing the Schedule of Classes," Defining Auto Enroll Options and Capacity, page 559

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Student Records"

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Dynamic Academic Calendars"

Chapter 16, "(AUS) Setting Up Government Reporting," page 369

Chapter 18, "(NZL) Setting Up Government Reporting," page 455

Inquiring About Enrollment Request Messages

Access the Enrollment Message Log page (click the Errors link or Messages link in the Status field on the Quick Enrollment page).

Message Severity

The posting process displays the severity of each message that it writes to the message log for the corresponding request. For example, if the posting process is unable to post a request due to errors, it displays a severity value of *Error*.

Message Text

The posting process displays the message text and a detailed explanation of each message that it writes to the message log for the corresponding request. You can view and update messages in the Message Catalog within the appropriate message set.

Requisite Checking for Adds

When a student fails to satisfy either a catalog requisite or class association requisite while enrolling in a class, the system returns not only a "requisites not met" error but also the Requirement Group long description for both on the Enrollment Message Log page. If a class has a course catalog level requisite and a class association level requisite, the system returns the requirement group description for both, even if the student has met one or the other. Catalog and class association requisites are set up on the Class Requisites page.

For example, a student has failed to satisfy either a catalog or a class association requisite. Depending on how class requisites are set up, the system displays both descriptions if the student satisfies the catalog requisite but not the class association requisite.

Requisite Checking for Drops

When a student attempts to drop a class, the Requisite Checking process runs if one or more of the student's other enrolled classes has a Requirement Group with a requisite type of *Co-Requisite*. If the dropped class is required as a co-requisite for another enrolled class, the system returns an error message. The system now returns the description for the Requirement Groups with the Co-Requisite requisite type. Catalog and class association requirement groups are set up on the Class Requisites page.

For example, a student is trying to drop class A and class A is a co-requisite for enrolled classes B and C. The system returns the enrollment requirement group description for both of those classes.

Requisite Checking for Self Service

The system displays the long description of the requirement group in error messages not only for administrative but also for student self-service enrollment pages. The *PeopleSoft Campus Self Service 9.0 PeopleBook* provides details about how to set up self service to enable this functionality.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Setting Up Student Records Self-Service."

Processing Enrollment Transactions Through the Enrollment Component

The Enrollment component is similar to the Enrollment Request and Quick Enroll components but has some unique features that make it the most powerful component in which to process enrollment transactions. The Enrollment component enables you to:

- Bypass all requisite, requirement, deadline, and other rules.
- Post enrollment immediately when you save the transaction.

It does this quickly because the system does not check the enrollment against all the rules that you set up.

- Skip the enrollment request process and post enrollment immediately.

To keep the powerful capability of this component secure and avoid complications in your enrollment business practices, grant access for this component only to a limited number of users, and these select few should use the component infrequently.

This section discusses how to:

- Enter class enrollment information.
- View enrollment transaction information.
- Add transcript notes and text.
- Indicate requirement designation options and independent study instructors.
- View last enrollment action information.
- (AUS) Enter HECS data.
- (CAN) Enter ESIS student data.
- (NZL) Enter funding information.
- (NLD) Indicate student paper information.

Pages Used to Process Enrollment Transactions Through the Enrollment Component

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Enrollment 1	STDNT_ENRL1	Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 1	Enter class enrollment information by student, bypassing all enrollment rules and requirements. Saving this page posts the enrollment transaction to the student's enrollment record.
Student Enrollment 2	STDNT_ENRL2	Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 2	View information about adds, drops, and other items for enrollment transactions processed through the Enrollment component.
Student Enrollment 3	STDNT_ENRL3	Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 3	Add transcript notes and text to a student's enrollment record for an enrollment transaction processed through the Enrollment component.
Student Enrollment 4	STDNT_ENRL4	Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 4	Indicate options for requirement designations and assign an independent study instructor to enrollment transactions processed through the Enrollment component.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Last Enrollment Action	STDNT_ENRL_LAST	Records and Enrollment, Enroll Students, Enrollment, Last Enrollment Action	View information about the last enrollment action processed on a student's enrollment record through the Enrollment component. The page provides a basic audit trail of information about the most recent enrollment action.
AUS Student Enroll (Australian student enrollment)	SSR_STDNT_ENRL_AUS	Records and Enrollment, Enroll Students, Enrollment, AUS Student Enroll	Enter HECS data for a student. Note. This page appears only if you select the Australia DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.
Cdn Student Enrollment (Canadian student enrollment)	CAN_RPT_STDNT_CRSE	Records and Enrollment, Enroll Students, Enrollment, Cdn Student Enrollment	Define ESIS student enrollment data. Note. This page appears only if you select the Canadian Government Reporting check box on the Academic Institution 6 page.
NZL Student Enroll (New Zealand student enrollment)	SSR_STDNT_ENRL_NZL	Records and Enrollment, Enroll Students, Enrollment, NZL Student Enroll	Enter funding information for the student. Note. This page appears only if you select the New Zealand Catalog, SDR, EFTS, StudyLink and NZQA check boxes on the Academic Institution 6 page.
NLD Student Paper (Dutch student paper)	SAD_BR_SPAP_NLD	Records and Enrollment, Enroll Students, Enrollment, NLD Student Paper	This page appears if you select the Use Dutch Functionality check box on the Student Admin Installation page. Use this page to record the student's end thesis for BRON reporting purposes. This information is used in the exam result data set for VAVO, which is the 331 file sent to BRON.

Entering Class Enrollment Information

Access the Student Enrollment 1 page (Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 1).

Student Enrollment 1Student Enrollment 2Student Enrollment 3Student Enrollment 4Last Enrollment Action

Ana BeckSR0400
Term: 2003 SprCareer: UndergradInstitution: PeopleSoft University

Find | View AllFirst1 of 1Last

*Class Nbr:1003

Description:Advanced Sculpture

Component:Seminar

Subject:Art

Catalog Nbr:145

Class Section:1

Academic Group:College of Fine Arts

Career:Undergrad

Session:Regular

Status:Enrolled

Reason:Enrolled

Status Date:11/19/2004

Action:Manual Add

Reason:

Program:LAU

Grading

☐ Override Grading Basis

*Grading Basis:GRDGraded

Grade In/Official:Repeat Code:

Units

Units Taken:3.00Units Earned:3.00

Course Count:1.00Progress:3.00

Billing Units:3.00FA Progress:3.00

Go to:Term HistoryEnrollment Summary

Student Enrollment 1 page

- Calculate End Date

This button becomes available when you select to add a class section within an OEE session and you enter a value in the Start Date field. Click this button to have the system calculate the end date of the OEE class section based on the start date that you enter.
- Class Nbr (class number)

Select the class in which you want to add or drop the student. Class values for other fields appear according to the schedule of classes and class associations.
- Status

The system displays the student's current enrollment status in the class section. The system sets the student's status based on the enrollment action that you process. If you have added or are adding the student to the specified class section through this component, the system displays the status as *Enrolled*. If you have dropped the student from the specified class section through this component, the system displays the status as *Dropped* up through the drop retain record period. After this period has passed, the system displays the status as *Enrolled* and assigns the corresponding penalty grade to the student enrollment record.
Statuses are: *Enrolled*, *Waiting*, and *Dropped*.

Reason	The system displays the reason associated with the student's current enrollment status in the class section. If you have added or are adding the student to the specified class section through this component, the system displays the reason as <i>Enrolled</i> . If you have dropped the student from the specified class section through this component, the system displays the reason as <i>Dropped (was enrolled)</i> .
Status Date	The date that you process the enrollment transaction for the corresponding row of the request. The system records the status date to track the date that you process information. The system uses the current system date for new enrollment transactions.
Action	Select from the following choices the action to perform on the enrollment record. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Choices are as follows: <i>Drop</i>: Select to drop the student from the corresponding class section. <i>Manual Add</i>: Select to manually enroll the student into the corresponding class section, bypassing all enrollment rules and requirements.
Reason	If you are dropping the student from the specified class section, select the reason for the enrollment action, such as whether the student is dropping the class or the class has been canceled. A reason value is not required.
Program	Enter the student's academic program for this enrollment. This field appears if you selected the Select Acad Prog During Enroll check box on the Academic Institution 5 page. This field is editable only if the student is active in more than one academic program for this term. If this is the case, the student's primary academic program for this term appears by default. You can change this value.
Grade In / Official	The grade in is the final grade given to the student for the class. You can enter the grade here, or you can use the grade roster generator. When a grade is entered and posted, the system displays the grade here. Note. Posting grades on the Student Enrollment 1 page <i>does not</i> automatically run the repeat checking process. The grade lapse process does not include incomplete grades entered on the Student Enrollment 1 page. The grade official is the official grade for calculation and transcript purposes. The Grading Basis automatically translates the grade In to another value in this field, if appropriate.

Units Earned

The system uses units earned to determine academic level, as well as to grant actual credit to the student. This field is separate from units taken to accommodate the granting of partial credit for a class while continuing to have the class count fully towards GPA, academic load, or billing. Units earned default from units taken. When you add an enrollment for a student using another enrollment component, the units earned also defaults to the same value as units taken. Regardless of the enrollment component, you must adjust units earned on the Student Enrollment 1 page.

Note. Units earned can be entered at any time, although they do not apply to a student's transcript until the class is graded.

Progress

Indicates the number of units the system uses, in conjunction with the billing factor, to calculate billing units. The system also uses progress units to calculate academic load. The system by default sets the value of this field to the academic progress units value on the Class Associations page.

Billing Units

In Student Financials, all per unit term fees, per unit course fees, and per unit class fees are driven off of the billing units. Billing units are calculated for an enrollment record by multiplying the billing factor, which is set on the Class Associations page, and the academic progress units for the selected class. Because the system by default sets the billing factor 1, billing units are usually equal to academic progress units. The Student Enrollment 1 page is the only place where you can override billing units for an individual enrollment. For example, if you set the billing factor to 2 and the academic progress units to 3, the billing units would be 6. This would be multiplied by whatever amount per billing unit you establish in Student Financials. But if you want to discount the class for a specific student, you could change the billing units here on the Student Enrollment 1 page back to 3.

FA Progress (financial aid progress)

Indicates units towards financial aid progress.

Term History link

Click to access the Term History component, where you can view all of a student's term statistics for each term of the student's academic career, withdraw the student from the specified term or session, and more.

Enrollment Summary link

Click to access the Enrollment Summary component, where you can view a summary of a student's enrollment information and term statistics.

Save

Click to post enrollment immediately to the student's enrollment record.

Warning! The system performs no checks against your enrollment rules.

See Also

- Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 754
- Chapter 37, "Viewing Class Enrollment Data," Viewing Student Statistics, page 880
- Chapter 23, "Performing Repeat Checking," page 533
- Chapter 43, "Grading Students," page 1043
- Chapter 6, "Setting Up the Course Catalog," Defining Course Catalog Data, page 90
- Chapter 24, "Managing the Schedule of Classes," Adjusting Units, page 583

Viewing Enrollment Transaction Information

Access the Student Enrollment 2 page (Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 2).

Student Enrollment 1Student Enrollment 2Student Enrollment 3Student Enrollment 4Last Enrollment Action

Ana BeckSR0400

Term: 2003 SprCareer: UndergradInstitution: PeopleSoft University

Find | View AllFirst1 of 1Last

Class Nbr: 1003Advanced SculptureSeminar

Subject: ArtCatalog Nbr: 145Class Section: 1

Academic Group: College of Fine ArtsUndergradSession: Regular

Status / Reason: EnrolledEnrolledStatus Date: 11/19/2004

Enrollment Add Date: 11/19/2004Enrollment Drop Date:

Grade Date:Primary Program: Liberal Arts Undergraduate

Grading Basis Date: 11/19/2004Repeat Date:

Grade Points Per Unit: 0.000Repeat Scheme: Undergraduate

Grade Points: 0.000Units Attempted: In Progress

Grading Scheme: Undergraduate Grading Scheme

☒ Include in GPA☐ Audit Grading Basis☒ Earn Credit☐ Mandatory Grading Basis

Student Enrollment 2 page

Note. The system bases tuition calculation on the following dates. These dates are critical for initial billing as well as refunds.

- Enrollment Add Date** The date that you added the class section to the student's enrollment record.
- Enrollment Drop Date** If you have dropped the student from the class section, the system displays the date that you processed the drop.

Grade Date	The date that you graded the student.
Primary Program	The student's primary academic program for the specified career and term combination.
Grading Basis Date	The date that you last changed the grading basis on the Student Enrollment 1 page. If you have not changed the grading basis, the system sets this field to the date that you added the class section to the student's enrollment record. To avoid potential repeat checking problems, this date must always be greater than or equal to the session first date to enroll value. The repeat checking process uses this value to determine which effective-dated grading basis row to use for the student. This value is also available as a Student Financials fee calculation variable on the Equation Detail page. Note. The grade posting process does <i>not</i> reference this field to determine which grading basis row to use for grading. Instead, the grade posting process uses the term begin date.
Repeat Date	The date that you last changed the repeat code on the Student Enrollment 1 page.
Grade Points Per Unit	The system bases this value on the grade definition that corresponds to the grading basis and grade for this enrollment row. The system sets the value of this field to 0 until the student receives a grade for the class.
Repeat Scheme	The repeat scheme for the student's academic career, as defined on the Academic Career Table component. The repeat scheme controls how the system evaluates this course for repeat checking.
Grade Points	The system bases this value on the grade definition that corresponds to the grading basis and grade for this enrollment row. The value of this field equals the grade points per unit multiplied by the units taken.
Units Attempted	The status of the student's progress in the class. The units attempted value remains <i>In Progress</i> until the student receives a grade for the class, in which case the value updates to <i>Yes</i> .
Grading Scheme	The system displays the value of this field according to the grading scheme of the student's primary academic program for the specified academic career and term, as defined on the Academic Program Table component.
Include in GPA	The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.
Audit Grading Basis	The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.

Earn Credit	The system displays the value of this field according to the grading basis on the Student Enrollment 1 page, as defined on the Grading Scheme Table page.
Mandatory Grading Basis	The system selects this check box if the grading basis for the class is mandatory. The system clears this check box if the grading basis for the class is elective.

Adding Transcript Notes and Text

Access the Student Enrollment 3 page (Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 3).

Student Enrollment 1Student Enrollment 2Student Enrollment 3Student Enrollment 4Last Enrollment Action

Ana BeckSR0400

Term: 2003 SprCareer: UndergradInstitution: PeopleSoft University

Find | View AllFirst1 of 1Last

Class Nbr: 1003Advanced SculptureSeminar

Subject: ArtCatalog Nbr: 145Class Section: 1

Academic Group: College of Fine ArtsUndergradSession: Regular

Status: EnrolledReason: EnrolledStatus Date: 11/19/2004

Student Position: Tuition Group:

Note ID: LASTLast Course Multi Term Sequenc

Find | View AllFirst1 of 1Last

*Transcript Note

1 *Transcript Note Sequence Nbr

☐ Note From Incomplete Process

Student Enrollment 3 page

Student Position	The student's enrollment position in the class section, which it uses for wait list processing.
Tuition Group	The tuition group to which this class section is tied. A tuition group is the shared characteristics among students. When you register students, the system automatically assigns them to the appropriate tuition groups. When you run the tuition calculation process, it sees that this class section is associated with the tuition group that you specify, and thus charges all students in the tuition group the fees for this class section of the course offering. You can tie all class sections of a course offering to a tuition group on the Course Catalog - Offerings page. You can tie specific class sections of a course offering to a tuition group on the Class Associations page.

Note ID	Select a standard transcript note for the class, if applicable.
Transcript Note	Enter additional free-form text about the specified transcript note. The system prints the text that you enter onto the student's transcript.
Transcript Note Sequence Nbr (transcript note sequence number)	Enter the sequence number of the transcript note. The sequence number indicates the printing order of the transcript notes that you specify.
Note From Incomplete Process	The system automatically selects this check box when the note is added during the incomplete/grade lapse process.

See Also

Chapter 43, "Grading Students," page 1043

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees"

Indicating Requirement Designation Options and Independent Study Instructors

Access the Student Enrollment 4 page (Records and Enrollment, Enroll Students, Enrollment, Student Enrollment 4).

Student Enrollment 1		Student Enrollment 2		Student Enrollment 3		Student Enrollment 4		Last Enrollment Action	
Ana Beck		SR0400							
Term:	2003 Spr	Career:	Undergrad	Institution:	PeopleSoft University				
								Find View All First 1 of 1 Last	
Class Nbr:	1003	Advanced Sculpture		Seminar					
Subject:	Art	Catalog Nbr:	145	Class Section:	1				
Academic Group:	College of Fine Arts	Undergrad		Session:	Regular				
Status:	Enrolled	Reason:	Enrolled	Status Date:		11/19/2004			
Grade Input:		Official Grade:							
Requirement Designation									
Designation:	HON	Honors		RD Option:	No				
				RD Grade:					
Independent Studies									
Instructor ID:									

Student Enrollment 4 page

See Also

Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 754

Viewing Last Enrollment Action Information

Access the Last Enrollment Action page (Records and Enrollment, Enroll Students, Enrollment, Last Enrollment Action).

Student Enrollment 1Student Enrollment 2Student Enrollment 3Student Enrollment 4Last Enrollment Action

Ana BeckSR0400
Term: 2003 SprCareer: UndergradInstitution: PeopleSoft University

Find | View AllFirst1 of 1Last

Class Nbr:1003Advanced SculptureSeminar

Subject:ArtCatalog Nbr:145Class Section:1

Academic Group:College of Fine ArtsUndergradSession:Regular

Status:EnrolledReason:EnrolledStatus Date:11/19/2004

Last Enrollment

Action:

Process:Enrollment

User ID:PS

ID:KU0007Locherty,Betty

Last Enrollment Action page

Action	The last enrollment action taken for this student through the Enrollment component.
Process	The process used for the last enrollment action. The possible values for this field are <i>Enrollment</i> , which refers to this page; <i>Enrollment Request</i> , which refers to the enrollment engine; <i>Grade Post</i> , which refers to the grade posting process; and <i>Class Cancelled</i> .
User ID	The user ID of the user who performed the last enrollment action for this class enrollment.
ID	The individual ID of the user who performed the last enrollment action for this class enrollment.

(AUS) Entering HECS Data

Access the AUS Student Enroll page (Records and Enrollment, Enroll Students, Enrollment, AUS Student Enroll).

Student Enrollment 3Student Enrollment 4Last Enrollment ActionAUS Student EnrollNLD Student Paper

Joan LarsenSRAUS4000

Term: Spr 2005Career: UndergradInstitution: PeopleSoft Australia Uni

Find | View AllFirst1 of 1Last

Class Nbr:

Subject:Catalog Nbr:Class Section:

Academic Group:Session:

Status: Enrolled

HECS Band ID:

HECS Band Charge:

HECS Load Factor:

EFTSL Load:

Student Career Nbr:0Cohort Year:0000CAN Print Date:

Liability Status:

AUS Student Enroll page

HECS Band ID	The system enters this value from the course catalog.
HECS Band Charge	The system enter the HECS band charge for the band ID.
HECS Load Factor	Enter the HECS load factor for this enrollment.
EFTSL Load	Enter the equivalent full-time student load for this enrollment.
Student Career Number	The system enters the value from the Student Term Activation page.
Cohort Year	The system enters this value from the Student Term Activation page.
Liability Status	The system enters this value from the Student Term Activation page.
CAN Print Date (Commonwealth Assistance Notice print date)	The date the CAN was printed for this student.

(CAN) Entering ESIS Student Data

Access the Cdn Student Enrollment page (Records and Enrollment, Enroll Students, Enrollment, Cdn Student Enrollment).

See [Chapter 17, "\(CAN\) Setting Up Government Reporting," Defining PSIS Student Enrollment Data, page 448.](#)

(NZL) Entering Funding Information

Access the NZL Student Enroll page (Records and Enrollment, Enroll Students, Enrollment, NZL Student Enroll).

Student Enrollment 3Student Enrollment 4Last Enrollment ActionNZL Student EnrollNLD Student Paper

Ronald BradleySRNZL2001

Term:Aut 2005Career:UndergradInstitution:Silver Fern University

Find | View AllFirst1 of 1Last

Class Nbr:	1002	Intro to Financial Accounting	Lecture
Subject:	Acct	Catalog Nbr:100	Class Section:001
Academic Group:	Faculty of Business	Undergrad	Session:Regular

Status:Enrolled

Funding Source:03Full Fee Domestic Student

EFTS Factor:0.1250

Course Classification:03Arts; Humanities; Social Sciences

Funding CategoryA2Arts & Soc Sci - Degree

NZL Student Enroll page

- Funding Source

The system enters this value from the student's program.
Enter the funding source for the student's program on the Student Program page.
- EFTS Factor

The system enters this value from the course catalog.

Course Classification

The system enters this value from the Acad Prog NZL (academic program New Zealand) page for course classifications defined with the type *Program*. For course classifications defined with the type *Course*, the system enters the value from the course catalog.

Set up course classifications on the Course Classifications page.

See [Chapter 18, "\(NZL\) Setting Up Government Reporting," Defining Course Classifications, page 459.](#)

Funding Category

If the student's program has a course classification type of *Program*, the first character from the Academic Program table is concatenated with the second character of the course catalog value, otherwise the course catalog value is used.

(NLD) Indicating Student Paper Information

Access the NLD Student Paper page (Records and Enrollment, Enroll Students, Enrollment, NLD Student Paper).

Student Enrollment 2Student Enrollment 3Student Enrollment 4Last Enrollment ActionNLD Student Paper

Ana BeckSR0400
Term: 2003 SprCareer: UndergradInstitution: PeopleSoft University

Find | View AllFirst1 of 1Last

Class Nbr:	1003	Advanced Sculpture	Seminar
Subject:	Art	Catalog Nbr:	145
Academic Group:	College of Fine Arts	Undergrad	Session: Regular

BRON Course ID:

000068

Psychology 1A

Title Paper:

The Function of Language in Memory

Result Paper

Good

Grade Date:

05/23/2003

Application Paper

In exam Year

NLD Student Paper page

BRON Course ID

Select a BRON course ID to link to the student's end thesis.

Title Paper

Enter the title of the student's end thesis.

Result Paper

Select the result of the student's end paper. Values are *Adequate*, *Good*, and *Insufficient*.

Grade Date

Enter the date the student received the grade for the end paper.

Application Paper

Enter whether the student completed the paper *In exam Year*, or, if not, whether the reason was *Dispensation*—meaning the student was excused from completing the paper—*Exchanged for Diploma*, or *Passed without Grade*.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "(NLD) Managing the BRON Interface"

Processing Enrollment Transactions Through the Block Enrollment Feature

This section provides an overview of the Block Enrollment feature and discusses how to:

- Predefine student enrollment blocks.
- Predefine class enrollment blocks.
- Set class enrollment block defaults.
- Merge, retrieve, and post data for block enrollment requests.
- Create custom student enrollment blocks.
- Create custom class enrollment blocks.
- View block enrollment request details.
- Maintain detail for a student's block enrollment request.
- Maintain additional detail for a student's block enrollment request.

Understanding the Block Enrollment Feature

Student Records provides robust functionality to process groups of enrollment requests at one time. These groups of enrollment requests are known as block enrollment requests. Through the Block Enrollment feature, you can merge a block of students with a block of classes and post these merged blocks as enrollment requests all in one procedure.

After merging student blocks with course blocks, you can opt to use the Block Enrollment component to retrieve and review this data before posting the block enrollment request.

Student and Class Enrollment Blocks

This section discusses how to predefine blocks of classes and blocks of students for use in the block enrollment request processing. You can predefine student blocks by adding students one by one on the Block Enrollment Students page, or you can predefine student blocks based on specified criteria using the Mass Change feature.

Later when you process a block enrollment request, you can merge blocks of classes with blocks of students and submit a single enrollment transaction. Because you store predefined blocks in your database when you save them, you can reuse the blocks for any later block enrollment request. This is especially useful in professional schools where all students enroll in the same classes year to year, or in certain undergraduate curricula where multiple classes are clustered as first year corequisites.

If you need to use the block of students or the block of classes only one time *and* you will not be editing the blocks at a later time, then as an alternative you can create custom blocks during processing.

Block Enrollment Requests

This section also discusses how to process block enrollment requests, which is done through the Block Enrollment component. The Block Enrollment component is the core of the block enrollment functionality. You can merge predefined student blocks with predefined course blocks, create and merge custom blocks of students and custom blocks of classes, or any combination of the two. When you run the Structured Query Report (SQR) process to perform the merge, the process combines the students in the student block with the courses in the course block, thus creating an enrollment request that contains all of the merged records. This enrollment request is keyed by an enrollment request ID.

When you are ready, you can, with the click of a button, process all of the individual enrollment requests included in the block enrollment request. Alternatively, you can note the enrollment request ID and run the enrollment posting process using the Mass Enrollment page. The button enables you to process block enrollment requests directly through the Block Enrollment component by Remote Call, while the Mass Enrollment component enables you to process block enrollment requests through PeopleSoft Process Scheduler.

After running the posting process, use the Block Enrollment component to review the processing results to see whether each student got enrolled into the requested classes or whether the enrollment engine encountered errors. To correct errors, adjust each affected student's enrollment request or term record as necessary, save your changes, then post the block enrollment request again—either through the Block Enrollment component or the Mass Enrollment page.

Note. The Block Enrollment feature is *not* intended as a vehicle for converting historical enrollment records, nor should it be used as a vehicle to convert these records.

Mass Change and Enrollment Blocks

Using the Mass Change feature, you can create enrollment blocks based on specified criteria. The PeopleSoft system delivers the Create Student Block mass change type and Create Student Block mass change template, which you use to create a mass change definition. The Create Student Block mass change template contains the following fields:

- Academic plan
- Academic program
- Academic load
- Academic level - projected
- Term
- Total grade points

Using these fields you can select specific criteria by which to create a student enrollment block. For example, you can specify that the academic plan equals English, the academic program equals Liberal Arts Undergraduate, and the term equals 0550. When you run the mass change the system creates an enrollment block with every student active in program Liberal Arts Undergraduate, plan English, and term 0550. You also select default values for academic institution, academic career, student enrollment block, and definition. These are the key values for the enrollment block that you are creating.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Using Mass Change"

Pages Used to Process Enrollment Transactions Through the Block Enrollment Feature

Page Name	Definition Name	Navigation	Usage
Block Enrollment Students	STDNT_BLOCK	Records and Enrollment, Enroll Students, Block Enrollment, Create Student Block, Block Enrollment Students	Define groups of students for block enrollment purposes. You can then merge blocks of students with blocks of classes by using the Block Enrollment component.
Block Enrollment Classes	CRSE_BLOCK	Records and Enrollment, Enroll Students, Block Enrollment, Create Class Block, Block Enrollment Classes	Define groups of classes for block enrollment purposes. You can then merge blocks of classes with blocks of students by using the Block Enrollment component.
Class Block Defaults	CRSE_BLOCK_DEFAULT	Click the Class Block Defaults link on the Block Enrollment Classes page.	Set defaults for each class that you add to the course block. You can set up defaults for the enrollment action, action reason, and enrollment overrides. Enrollment security is enforced so that you cannot override anything to which you do not have access.
Block Enroll Merge	BLOCK_ENROLL_MERGE	Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enroll Merge	Create custom student blocks and course blocks, merge predefined or custom student blocks with predefined or custom course blocks, post block enrollment requests, and retrieve data and process results about merged blocks and posted blocks.

Page Name	Definition Name	Navigation	Usage
Create Custom Student Block	BLK_ENRL_STDNT_SEC	Click the Detail/Create link under the Student Block field on the Block Enroll Merge page.	Create a custom block of students to use for block enrollment. This feature enables you to enroll one or more students into a class or block of classes without having to predefine a student enrollment block on the Block Enrollment Students page, thus simplifying the block enrollment process. You can also use this feature to perform class maintenance where only a few students need changes to their enrollment records.
Create Customized Class Block	BLK_ENRL_CRSE_SEC	Click the Detail/Create link under the Class Block field on the Block Enroll Merge page.	Create a custom block of classes to use for block enrollment. This feature enables you to enroll students into one or more classes without having to predefine a class enrollment block on the Block Enrollment Classes page, thus simplifying the block enrollment process. You can also use this feature to perform class maintenance where only a few students need changes to their enrollment records.
Block Enroll Detail	BLOCK_ENRL_DETAIL	Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enroll Detail	View, for a specific block enrollment request, a list of the student and class combinations that have been merged or that have been posted to the students' records. The list appears in grid format with a row for each student and class combination. These student and class combinations are term specific.
Block Enrl Detail1 (block enroll detail 1)	BLOCK_ENRL_DTL1	Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enrl Detail1	Maintain the details of a block enrollment request for a specific student and class.

Page Name	Definition Name	Navigation	Usage
Block Enrl Detail2 (block enroll detail 2)	BLOCK_ENRL_DTL2	Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enrl Detail2	Maintain the details of a block enrollment request for a specific student and class.

Predefining Student Enrollment Blocks

Access the Block Enrollment Students page (Records and Enrollment, Enroll Students, Block Enrollment, Create Student Block, Block Enrollment Students).

Block Enrollment Students

Academic Institution: PSUNV PeopleSoft University
Student Enrollment Block: 0410 ***Description:** RS Student Enrol term 410

Find | View All First 1-4 of 4 Last

*ID	*Academic Career	Academic Program
SR14000 Monica Gibbs	UGRD Undergrad	LAU Liberal Arts Undergraduate
SR14001 Joseph Zachary	UGRD Undergrad	LAU Liberal Arts Undergraduate
SR14002 Ruben Cabalbag	UGRD Undergrad	LAU Liberal Arts Undergraduate
SR14003 Jose Caballero	UGRD Undergrad	LAU Liberal Arts Undergraduate

Block Enrollment Students page

Academic Institution	The academic institution to which the student enrollment block belongs. Select an academic institution upon entering the page.
Student Enrollment Block	Enter a description of the student enrollment block code.
ID	Select the identification code of the student you want to include in the group. The system prompts you with IDs from the STDNT_ID_SRCH table.
Academic Career	Select the student's academic careers that you want to include in the block. The system prompts you with values from the STDNT_CAREER table. This field is required whenever you select an ID.
Academic Program	Select the student's academic programs that you want to include in the block.
Add Merge Process	Click to access the Block Enrollment component, where you can process block enrollment requests.

Note. You can also create student blocks based on specified criteria using the Mass Change feature.

See [Chapter 32, "Processing Class Enrollment Transactions," Understanding the Block Enrollment Feature, page 784.](#)

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Block Enrollment Feature, page 784](#)

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Using Mass Change"

[Chapter 29, "Creating Student Blocks," page 687](#)

Predefining Class Enrollment Blocks

Access the Block Enrollment Classes page (Records and Enrollment, Enroll Students, Block Enrollment, Create Class Block, Block Enrollment Classes).

Block Enrollment Classes

Academic Institution: PSUNV PeopleSoft University

Class Enrollment Block: H1 'Description: History Blk 1

Find | View All First 1 of 5 Last

'Term:	'Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
0390	Enroll	1332	GRD	3.00	1.00		
Action Dt Reason Drop if Enroll Grade In History 305 1 01/02/2000 World History for Teachers Regular Undergrad							
Transcript Note ID: Repeat Code: Instructor ID:							
Overrides Access ID: Full Class Enrollment Access ☒ Action Date ☒ Appointment ☐ Dynamic Dates ☒ Career ☒ Closed Class ☒ Class Links ☐ Class Units ☐ Grading Basis ☒ Class Permission ☒ Service Indicator ☒ Requisites ☒ TimeConflict ☒ Unit Load ☐ Wait List Okay							
Requirement Designation ☐ Ovrd Requirement Designation Requirement Designation Option: Requirement Designation: Requirement Designation Grade:							

Block Enrollment Classes page

- Academic Institution

The academic institution to which the class enrollment block belongs. Select an academic institution upon entering the page.
- Class Enrollment Block

Enter a description of the class enrollment block code.

Class Block Defaults	Click to access the Class Block Defaults page, where you can set default values for security access overrides of enrollment functions. The overrides that you set on this page are used for each new class enrollment block detail that you enter.
Term	Select the term for which you want to enroll students in a specific class. Later on this page you specify the specific class in the Class Nbr field. You can add classes from multiple terms to the enrollment course block. Define terms on the Term Table page.
Add Merge Process	Click to access the Block Enrollment component, where you can process block enrollment requests.

Overrides

This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Setting Class Enrollment Block Defaults, page 790](#)

[Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 754](#)

Setting Class Enrollment Block Defaults

Access the Class Block Defaults page (click the Class Block Defaults link on the Block Enrollment Classes page).

Block Enrollment Classes	
Class Block Defaults	
Academic Institution:	PSUNV PeopleSoft University
Class Enrollment Block:	H1 History Blk 1
*Action:	Enroll  Reason:  
Action Date:	01/02/2000 
Overrides	
Access ID:	Full Class Enrollment Access
☒ Override Action Date	☒ Override Permission
☒ Override Appointment	☒ Override Requisites
☒ Override Career	☐ Ovrld Requirement Designation
☒ Closed Class	☒ Override Service Indicator
☒ Override Class Links	☒ Override Time Conflict
☐ Override Class Units	☒ Override Unit Load
☐ Override Grading Basis	☐ Wait List Okay

Class Block Defaults page

Action Select a value for this field to set the default enrollment action for the class enrollment block. The system by default sets the enrollment action to *Enroll*, but you can change this default value.

Reason Select the reason for the enrollment action, such as whether the students are adding or dropping classes in this class enrollment block.

Overrides

This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

Access ID The system displays the access ID, which describes the amount of enrollment access you have.

OK Click to return to the Block Enrollment Classes page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Student Records"

Merging, Retrieving, and Posting Data for Block Enrollment Requests

Access the Block Enroll Merge page (Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enroll Merge).

Block Enroll Merge

Block Enroll Detail

Block Enrl Detail1

Block Enrl Detail2

Enrollment Request ID:

0000000000

Request Status:

Pending

Submit

Merge Blocks

Academic Institution:

PSUNV

PeopleSoft University

Merge

Student Block:

H1

History Stdnt Blk1

[Detail / Create](#)

Class Block:

H1

History Blk 1

[Detail / Create](#)

Filtering Criteria

Academic Career:

Retrieve

Term:

Class Nbr:

Detail Status:

EmplID:

Block Enroll Merge page

With block enrollment, you can use any combination of custom student blocks and class blocks with predefined blocks. For example, you might have a predefined course block for first year law students that you want to merge with some late admits to the law school. Instead of predefining a student block for the new students, you might choose to merge the predefined course block for first year law students with a custom student block.

General Fields

Enrollment Request ID	The system displays the identification number for the block enrollment request. As soon as you merge the student enrollment block with the class enrollment block, the system generates an enrollment request ID that is unique to the block enrollment request. The same number is assigned to each student and class combination in the block enrollment request.
Request Status	The status of the block enrollment request: Errors: The enrollment engine was unable to post the submitted enrollment request due to errors. Pending: The request is pending submission for enrollment processing. Success: The enrollment engine successfully posted the request.

Merging Student and Class Enrollment Blocks

Academic Institution	Select the academic institution for which you want to process this block enrollment request.
Student Block	Select a predefined student enrollment block, or leave this field blank and click the Detail / Create link beneath the field to define a custom student enrollment block. Important! If you create a custom student enrollment block, the system does not store the block for future retrieval.
Detail / Create	Click this link below the Student Block field either to view the detail for the student enrollment block that you selected, or to define a custom student enrollment block. To view the detail for a predefined student enrollment block, select a value for the Student Block field and then click this link. The system launches a new application window to display the Student Enrollment Block page. Edit the student block as necessary. To define a custom student enrollment block, leave the Student Block field blank and click this button. The system displays the Create Custom Student Block page, where you can define the students that you want to include in the student enrollment block.
Class Block	Select a predefined class enrollment block, or leave this field blank and click the Detail / Create link below the field to define a custom class enrollment block. Important! If you create a custom class enrollment block, the system does not store the block for future retrieval.
Detail / Create	Click this link below the Class Block field either to view the detail for the class enrollment block that you selected, or to define a custom class enrollment block. To view the detail for a predefined class enrollment block, select a value for the Class Block field, then click this link. The system launches a new application window to display the Class Enrollment Block page. Edit the class block as necessary. To define a custom class enrollment block, leave the Class Block field blank and click this button. The system displays the Create Customized Class Block page, where you can define the classes that you want to include in the class enrollment block.

Merge	Click to run the SQR process that merges the student block with the class block. Your process request is scheduled in PeopleSoft Process Scheduler. You can view the status of your merge using the process monitor. After the process completes the merge, the merge process updates the enrollment status of the block enrollment request to <i>pending</i> and the fields in the Merge Blocks group box become available for entry. You are now ready to retrieve and review the results of the merge process (optional) and post your block enrollment request, all of which can be done using the Block Enrollment component. Note. The merge process combines student blocks with course blocks for all students in the student block, regardless whether a student activated in the term to which the class belongs. When you post the block enrollment request, if the enrollment engine encounters a student not activated in the term to which the class belongs, it cancels processing of that student's enrollment request and logs an error message. You can retrieve and view the error message through the Block Enrollment component.

Retrieving Data for Merged Blocks or Posted Block Enrollment Requests

Use the fields in the Filtering Criteria group box to retrieve the results of the merging process or the posting process. To narrow your search, enter specific filtering criteria.

Academic Career	Select the academic career for which you want to retrieve detail for this block enrollment request. If you want to search for detail in all academic careers, leave this field blank.
Term	Select the term for which you want to retrieve detail for this block enrollment request. If you want to search for detail in all terms, leave this field blank.
	Note. If your filtering criteria include a term, you must enter an academic career value prior to selecting a term.
Class Nbr (class number)	If you want to retrieve detail for a specific class within this block enrollment request, select the class. Otherwise, leave this field blank to retrieve all classes within this block enrollment request.
	Note. If your filtering criteria include a class number, you must enter the valid academic career and term prior to entering or searching for the class number.



Click the Enter Search Criteria button to access the Basic Class Search page, where you can search the schedule of classes for the class that you want to retrieve.

Detail Status

Select from the following choices the status of the block enrollment request for which you want to retrieve detail lines.

None: The system retrieves all detail lines within this block enrollment request.

Errors: The system retrieves all detail lines within this block enrollment request that the system was unable to post due to errors.

Pending: The system retrieves all detail lines within this block enrollment request that are pending submission for enrollment processing.

Success: The system retrieves all detail lines within this block enrollment request that the enrollment engine has successfully posted.

ID

If you want to retrieve detail lines within this block enrollment request for a specific student, enter the student's ID.

Retrieve

Click to retrieve the results of the merging process or the posting process that match your filtering criteria. The system displays the Block Enroll Detail page, where you can view the results of your selection. If you want to view all detail lines within this block enrollment request, click this button without entering any filtering criteria. To narrow your search, enter values for any of the filtering criteria on the Block Merge Enroll page. For example, if you want to view only the errors found during the posting process, select *Errors* in the Detail Status field , then click this button.

Note. While you can view several thousand rows of merged data through the Block Enrollment component, it is possible to merge more data than the component can display. If you have merged more than several thousand rows of data, you should specify some filtering criteria before clicking the Retrieve button.

Posting Block Enrollment Requests

Submit

Click to process the block enrollment request for all detail lines within this block enrollment request. The enrollment engine posts all successful class enrollment requests to the appropriate student's enrollment record.

Whenever you post a block enrollment request a subsequent time, the enrollment engine processes all requests within a block enrollment request that are not yet posted. The enrollment engine does *not* process detail lines within the block enrollment request that have already posted successfully.

If you want to post the block enrollment request later, you can set up PeopleSoft Process Scheduler to run the posting process automatically, or you can use the Mass Enrollment page to post the block enrollment request. To successfully complete a block enrollment request, however, you first must merge the student enrollment block with the class enrollment block on the Block Enroll Merge page.

If any entry in the block enrollment request fails to post to the student's enrollment record, the entire block enrollment request has an error status because all requests within the block are tied to the same enrollment request ID. This, however, does *not* mean that everything was in error. Some detail lines within the block enrollment request might be successful, while some others have errors.

To correct errors, adjust each affected student's detail line of the block enrollment request or term record as necessary, then post the block enrollment request again.

Note. The posting process can handle as much data as you want to send to it. However, if the posting process takes too long to complete, you might get a remote call timeout error that prevents the process from completing successfully. The remote call timeout error depends on your timeout settings and the size of the batch you are posting. A system administrator can increase the timeout setting on the Remote Call tab of PeopleSoft Configuration Manager. Alternatively, if the block enrollment request is too large, you can note the enrollment request ID and use the Mass Enrollment page to post the block enrollment request. The Mass Enrollment page uses PeopleSoft Process Scheduler and is therefore not subject to remote call timeout errors.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Predefining Student Enrollment Blocks, page 788](#)

[Chapter 32, "Processing Class Enrollment Transactions," Predefining Class Enrollment Blocks, page 789](#)

[Chapter 32, "Processing Class Enrollment Transactions," Creating Custom Student Enrollment Blocks, page 797](#)

[Chapter 32, "Processing Class Enrollment Transactions," Predefining Class Enrollment Blocks, page 789](#)

[Chapter 32, "Processing Class Enrollment Transactions," Posting Mass Enrollment Requests, page 808](#)

[Chapter 24, "Managing the Schedule of Classes," Searching for Classes, page 613](#)

Creating Custom Student Enrollment Blocks

Access the Create Custom Student Block page (click the Detail/Create link under the Student Block field on the Block Enroll Merge page).

Note. When you create a custom student enrollment block, the list of students that you enter is valid only for one-time merging of students into classes. After you run the merging process, you cannot retrieve the custom student enrollment block that you have created. Also, make sure that you have a finalized list of students before you create a custom student enrollment block because the only way to save your list after you enter it into the page is to run the merging process.

ID	Select the identification code of the student you want to include in the custom student enrollment block. The system prompts you with IDs from the STDNT_ID_SRCH table.
Academic Career	Select the student's academic careers that you want to include in the block. The system prompts you with values from the STDNT_CAREER table. This field is required whenever you select an ID.
OK	When you have entered all of the students and their academic careers for this custom student enrollment block, click this button to return to the Block Enroll Merge page.

Creating Custom Class Enrollment Blocks

Access the Create Customized Class Block page (click the Detail/Create link under the Class Block field on the Block Enroll Merge page).

Block Enroll Merge									
Create Customized Class Block									
Academic Institution: PSUNV PeopleSoft University									
Find View All First 1 of 4 Last									
*Term:	Action Reason	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2		
0450	Enroll	1202	GRD	0.00	1.00				
				Math	20	1			
				Remedial Calculus					
				2001 Fall	Regular	Undergrad			
Overrides									
Access ID: Full Class Enrollment Access ☐ Override Service Indicator									
☐ Override Action Date	☒ Override Class Limit	☐ Override Grading Basis		☒ Override Time Conflict					
☐ Override Appointment	☐ Override Class Links	☒ Override Permission		☒ Override Unit Load					
☐ Override Career	☐ Override Class Units	☒ Override Requisites		☒ Wait List Okay					
Requirement Designation									
☐ Ovrld RD	Designation:						Note ID:		
RD Option:		RD Grade:					Repeat:		
Independent Studies									
Instructor ID:									

Create Customized Class Block page

Note. When you create a custom class enrollment block, the list of classes that you enter is valid for only one-time merging of students into classes. After you run the merging process, you cannot retrieve the custom class enrollment block that you have created. Also, make sure that you have a finalized list of classes before you create a custom class enrollment block because the only way to save your list after you enter it into the page is to run the merging process.

Term Select the term for which you want to enroll students in a specific class. Later on this page, you'll specify the specific class in the Class Nbr field. You can add classes from multiple terms to the enrollment course block.

Overrides This group box contains multiple check boxes that identify what aspects of enrollment validation you want to override for this particular class enrollment block. Only overrides that you are authorized to access are available.

OK Enter the appropriate class data that you want to include in the custom class enrollment block, adding a new row for each class. Then click this button to return you to the Block Enroll Merge page.

Viewing Block Enrollment Request Details

Access the Block Enroll Detail page (Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enroll Detail).

Block Enroll Merge Block Enroll Detail Block Enrl Detail1 Block Enrl Detail2								
Enrollment Request ID: 0000001571								
Customize Find View All First 1-15 of 15 Last								
Seq #	ID	Name	Term	Career	Class Nbr	Action	Status	DETAIL
1	SR0400	Beck,Ana	0450	UGRD	1111	Enroll	Success	DETAIL
2	SR0400	Beck,Ana	0450	UGRD	1202	Enroll	Success	DETAIL
3	SR0400	Beck,Ana	0450	UGRD	1677	Enroll	Errors	DETAIL
4	SR0401	Beckett,David	0450	UGRD	1111	Enroll	Success	DETAIL
5	SR0401	Beckett,David	0450	UGRD	1202	Enroll	Success	DETAIL
6	SR0401	Beckett,David	0450	UGRD	1677	Enroll	Errors	DETAIL
7	SR0402	Beer,Dalelia	0450	UGRD	1111	Enroll	Success	DETAIL
8	SR0402	Beer,Dalelia	0450	UGRD	1202	Enroll	Success	DETAIL
9	SR0402	Beer,Dalelia	0450	UGRD	1677	Enroll	Errors	DETAIL
10	SR0403	Beale,Gregory	0450	UGRD	1111	Enroll	Success	DETAIL
11	SR0403	Beale,Gregory	0450	UGRD	1202	Enroll	Success	DETAIL
12	SR0403	Beale,Gregory	0450	UGRD	1677	Enroll	Errors	DETAIL
13	SR0404	Dain,Mark	0450	UGRD	1111	Enroll	Success	DETAIL
14	SR0404	Dain,Mark	0450	UGRD	1202	Enroll	Success	DETAIL
15	SR0404	Dain,Mark	0450	UGRD	1677	Enroll	Errors	DETAIL

Block Enroll Detail page

If the enrollment engine posting process encounters errors and cannot post the student's enrollment request, you can drill down to the enrollment request detail for any student and class combination found on the list to view the errors. Change the individual's enrollment request or career term record, then post the block enrollment request again.

Enrollment Request ID

The system displays the identification number for the block enrollment request. As soon as you merge the student enrollment block with the class enrollment block, the system generates an enrollment request ID that is unique to the block enrollment request. The same number is assigned to each student and class combination in the block enrollment request. View an individual student's request within a block enrollment request through this component, or use this enrollment request ID to view an individual student request through the Enrollment Request and Quick Enroll components.

Seq # (sequence number)

Indicates the sequence in which the student and class combination resides in the block enrollment request. It is for internal processing purposes only.

ID

The identification number of the student to which this detail line of the block enrollment request relates.

Name	The name of the student to which this detail line of the block enrollment request relates.
Term	The term in which this detail line of the block enrollment request relates. A block enrollment request can have student and class combinations in multiple terms for the same student.
Career	The academic career to which this detail line of the block enrollment request relates.
Class Nbr (class number)	The specific class in which this detail line of the block enrollment request relates. Each class requested for a student appears on its own detail line.
Action	The enrollment action for the student's requested class.
Status	The enrollment status for the student's requested class.
Detail	After you merge a student enrollment block with a course enrollment block, click this button for a specific student and class combination to view and edit the details of that detail line of the block enrollment request. The system populates the Block Enrl Detail1 and Block Enrl Detail2 pages, then displays the Block Enrl Detail1 page for you to view the information. After you post the block enrollment request, you can click this button for a specific student and class combination to review the detail results of the enrollment posting process. If the detail line of the block enrollment request successfully posted to the student's record, you can view the details on the Block Enrl Detail1 and Block Enrl Detail2 pages (they are unavailable for edit). If the enrollment posting process encounters errors for any of the detail lines of the block enrollment request, you can view the message text about the errors, change the affected student's enrollment request or career term record as necessary, and then go to the Block Enroll Merge page and post the block enrollment request again.

Note. If you encounter errors for multiple students in the block enrollment request and you want to override these errors, you must save the overrides for each student and class combination before proceeding to the next error.

Maintaining Detail for a Student's Block Enrollment Request

Access the Block Enrl Detail1 page (Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enrl Detail1).

Block Enroll Merge

Block Enroll Detail

Block Enrl Detail1

Block Enrl Detail2

Enrollment Request ID:

0000001571

Enrollment Request

Find

View All

First

1 of 1

Last

ID:

SR0400

Beck,Ana

Institution:

PeopleSoft University

Career:

Undergraduate

Primary Prog:

Liberal Arts Undergraduate

Term:

2001 Fall

Seq #	Action	Class Nbr				Grading Basis	Related 1	Related 2	Permission
1	Enroll	1111	Engl Lit	100	1	GRD			
	Reason		Surv Brit Lit			Grade In	Units Taken		
			Regular	Undergrad			3.00		

Request Status:

Success

User ID:

PS

Overrides

Access ID:

Full Class Enrollment Access

☐ Action Date

☒ Class Limit

☐ Grading Basis

☒ Service Indicator

☐ Appointment

☐ Class Links

☒ Permission

☒ Time Conflict

☐ Career

☐ Class Units

☒ Requisites

☒ Unit Load

☐ Wait List Okay

Messages

Find

View All

First

1 of 1

Last

Message Sequence:

Severity:

Last Update DateTime:

Block Enrl Detail1 page

Block Enroll Merge		Block Enroll Detail		Block Enrl Detail1		Block Enrl Detail2	
Enrollment Request ID:				0000001530			
Enrollment Request Find View All First 1 of 1 Last							
ID:		SRAUS4000 Larsen,Joan Ray		Institution:		PeopleSoft Australia Uni	
Career:		Undergraduate		Primary Prog:		Term: Spring 01	
Seq #	Action	Class Nbr		Grading Basis	Related 1	Related 2	Permission
1	Enroll	2369	Acct 101 001T	GRD	2368		
		Introduction to Accounting A					
Action Dt	Reason			Grade In	Units Taken	Academic Program	
02/01/2001		Regular Undergrad		C	15.00	BCOM	
Request Status: Errors		User ID: SAMPLE					
Australian Data							
Student Career Nbr		0					
Liability Status							
Cohort Year		0000					
Overrides							
Access ID: Full Class Enrollment Access						☐ Service Indicator	
☒ Action Date	☐ Class Limit	☐ Grading Basis				☐ Time Conflict	
☐ Appointment	☐ Class Links	☐ Permission				☐ Unit Load	
☐ Career	☐ Class Units	☐ Requisites				☐ Wait List Okay	
Messages Find View All First 1 of 2 Last							
Message Sequence: 1		Severity: Error		Last Update DateTime: 05/03/05 3:16:13PM			
Non-associated related class component TUT; Enrollment did not take place. (14640,159)							
The related class section was not defined as part of the class association for the class components. The graded section was being defined as a single stand alone class component, but another related class component (perhaps defined as association 9999 and not associated to the graded section) is being used for this request. Remove the related course from the request or verify that the related section was not inadvertently left out when courses were established.							

(AUS) Block Enrl Detail1 page

Important! After you merge the student and class enrollment blocks but before you post the block enrollment request, you can use this page to edit each individual student's enrollment request. However, you *must* save your changes for *each* student and class combination of the block enrollment request prior to posting to have the changes included in the posting process.

(AUS) Australia Data

The system enters values in the Student Career Nbr, Liability Status, and Cohort Year fields from the student's primary academic program and term of enrollment.

Maintaining Additional Detail for a Student's Block Enrollment Request

Access the Block Enrl Detail2 page (Records and Enrollment, Enroll Students, Block Enrollment, Block Enroll Merge, Block Enrl Detail2).

Block Enroll Merge		Block Enroll Detail		Block Enrl Detail1		Block Enrl Detail2	
Enrollment Request ID:				0000001571			
				Find View All First 1 of 1 Last			
ID:		SR0400 Beck,Ana		Institution:		PeopleSoft University	
Career:		Undergraduate		Primary Prog:		Liberal Arts Undergraduate	
				Term:		2001 Fall	
Request							
Seq #	Action	Class Nbr	Course Count	Note ID	Repeat		
1	Enroll	1111	1.00				
			Engl Lit	100	1	Regular	
			Surv Brit Lit				
Request Status:		Success					
Requirement Designation							
☐ Ovrd Requirement Designation				Requirement Designation Option:			
Requirement Designation:				Requirement Designation Grade:			
Independent Studies							
Instructor ID:							
Overrides							
Enrollment Access ID:		Full Enrl		☐ Override Class Units			

Block Enrl Detail2 page

Processing Enrollment Transactions Through the Enrollment Request Component

The Enrollment Request component has the exact same functionality as the Quick Enroll component. Transactions that you process through the Enrollment Request component can also be accessed through the Quick Enroll component and vice versa. You'll use the Enrollment Request component most often to enter enrollment information on a student-by-student basis either through an Interactive Voice Response (IVR) interface or through the pages themselves. You generate enrollment requests, which you can post in the page or in a background process. The enrollment engine posting process validates the requests against all of the rules that you have created, such as rules for requisites and requirements. Depending on how you set up your enrollment security, you might be permitted to override just certain aspects of your enrollment rules, such as class limits or prerequisites.

Enrollment security plays an important role in defining who has access to add class enrollments to a student's enrollment record. Use the Update/Display mode to post unsuccessful enrollment requests or to view the enrollment request data.

This section discusses how to:

- Add or update student enrollment request transactions.
- Add transcript notes to enrollment requests.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Student Records"

Pages Used to Process Enrollment Transactions Through the Enrollment Request Component

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Request	ENRL_REQUEST	Records and Enrollment, Enroll Students, Enrollment Request, Enrollment Request	Add or update enrollment request transactions for students.
Transcript Note	ENRL_REQ_NOTE	Click the Transcript Note link on the Enrollment Request page or the Create Transcript Note link on the Quick Enrollment page.	Add and update transcript notes on an enrollment request.
Access to Enrollment Functions	ENRL_REQ_ACCESS	Click the Operator Enrollment Access link on the Enrollment Request page or the View Enrollment Access link on the Quick Enrollment page.	View your security access to enrollment functions.

Adding or Updating Student Enrollment Request Transactions

Access the Enrollment Request page (Records and Enrollment, Enroll Students, Enrollment Request, Enrollment Request).

Enrollment Request

SR0400

Ana Beck

PeopleSoft University

Undergraduate

Liberal Arts Undergraduate

2003 Spring

Enrollment Request ID: 0000000000

Status: Pending

Submit

User ID: PS

[Operator Enrollment Access](#)

Enrollment Request Details

Find | View All

First 1 of 1 Last

Sequence Nbr: 1 Pending

+ -

*Action: Enroll

Action Reason:

☐ Override Action Date

Action Date:

☐ Wait List Okay

Class Nbr: 2071

Anthropolo 102 1 Lecture Intro to Anthropology

Regular Academic Session Undergraduate

Academic Program: LAU

Related Class 1:

Related Class 2:

Instructor ID:

Repeat Code:

[Transcript Note](#)

Enrollment Request page (1 of 2)

Override

☐ Grading Basis: GRD Graded

Grade Input:

☐ Units Taken: 3.00

Course Count: 1.00

☐ Designation:

☐ Take Requirement Designation

RD Grade:

☒ Permission Nbr:

Additional Overrides

☐ Appointment

☐ Career

☒ Class Limit

☐ Class Links

☒ Requisites

☒ Service Indicator

☒ Time Conflict

☒ Unit Load

Drop This Class if Enrolled:

Error Messages

Message Sequence: Severity: Last Update DateTime:

Enrollment Request page (2 of 2)

User ID	The system displays the identification code of the user who created the enrollment request, providing you with a visible audit trail of the changes made to enrollment requests.
Sequence Nbr (sequence number)	The system sets the sequence number to 1 and increases it by one for each class section added to the enrollment request. The number specifies the order in which the enrollment engine processes rows within the request.
End Date	If an OEE enrollment transaction successfully posts to a student's enrollment record, the system displays the calculated end date of the OEE class. The enrollment process calculates the end date and all the other dynamic calendar dates for the student based on the OEE dynamic date rule assigned to the class. If no OEE dynamic date rule has been defined for the class, the enrollment process uses the rule established for the course offering. If no rule exists for the course offering, the enrollment process fails the transaction and the system returns an error message. You can view the other dynamic academic calendar dates that the enrollment process calculates for the student's OEE enrollment by clicking the academic calendar link on the Study List or by accessing the Student OEE Enroll Data page.

Error Messages

Message Sequence	The posting process displays a sequence number for each message that it writes to the message log for the corresponding request.
Severity	The posting process displays the severity of each message that it writes to the message log for the corresponding request. For example, if the posting process is unable to post a request due to errors, it displays a severity value of <i>Error</i> .
Last Update Date Time	The posting process displays the last date and time that it updated the message log for the corresponding request.
Message Text (unlabeled)	The posting process displays the message text and a detailed explanation of each message that it writes to the message log for the corresponding request. You can view and update messages in the Message Catalog within the appropriate message set.

Important! The remaining page elements are described in context of the Quick Enrollment page.

(AUS) Entering Australia Data

When enrolling students in an Australian institution, the Australia Data group box appears.

Australian Data			
Student Career Nbr	0		
Liability Status	110		HECS-HELP Deferred pre2005
Cohort Year	2005		Cohort 2005

Enrollment Request page, Australia Data group box

The system enters the field values on this page from the Student Term Activation page.

(NZL) Entering New Zealand Data

When enrolling students in a New Zealand institution, the New Zealand Data group box appears.

New Zealand Data			
Funding Source	FullFeeDom		Full Fee Domestic Student
Classification	03		Arts; Humanities; Social Sciences
Funding Category	A2		Arts & Soc Sci - Degree
EFTS Factor			

Enrollment Request page, New Zealand Data box

The system enters the field values on this page from the Course Catalog component.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Quick Enrollment Component, page 754](#)

[Chapter 34, "Using Enrollment-Related Processes," Managing Wait Lists, page 833](#)

[Chapter 31, "Managing Enrollment and Validation Appointments," Assigning and Maintaining Appointments for Individual Students, page 739](#)

[Chapter 37, "Viewing Class Enrollment Data," Viewing Student Statistics, page 880](#)

Adding Transcript Notes to Enrollment Requests

Access the Transcript Note page (click the Transcript Note link on the Enrollment Request page or the Create Transcript Note link on the Quick Enrollment page).

- Transcript Note ID

Select a standard transcript note for the class, if applicable.
- Transcript Note

Enter additional free-form text about the specified transcript note. The system prints the text you enter onto the student's transcript.

Tscript Note Nbr (transcript note number)

Enter the sequence number of the transcript note. The sequence number indicates the printing order of the transcript notes that you specify.

Processing Enrollment Transactions Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your students can perform enrollment transactions directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Enrollment"

Posting Mass Enrollment Requests

This section discusses how to post enrollment requests in mass.

Page Used to Post Mass Enrollment Requests

Page Name	Definition Name	Navigation	Usage
Mass Enrollment	RUNCTL_SRPCEMSS	Records and Enrollment, Enroll Students, Mass Enrollment, Mass Enrollment	Post a group of enrollment requests. Although enrollment processing is designed for you to generate and post requests online, the PeopleSoft system also provides this batch posting process as a means to speed data entry for registration officials who want to post large groups of enrollments at the same time rather than waiting for the enrollment engine to post each request at the time it is made.

Posting Enrollment Requests in Mass

Access the Mass Enrollment page (Records and Enrollment, Enroll Students, Mass Enrollment, Mass Enrollment).

You can also use the Mass Enrollment page to post block enrollment requests, especially larger requests that might be subject to a remote call timeout error if you were to click the Post button on the Block Enroll Merge page. Because the mass enrollment process uses PeopleSoft Process Scheduler to post enrollment requests, you avoid possible remote call timeout errors.

Run the Mass Enrollment COBOL/SQL process (SRPCEMSS) as needed. All the rules checking (requisites, permissions, repeat checking, and so on) still occur.

Note. You should use the Mass Enrollment page and its corresponding process for converting historical enrollment records.

From Enrollment Request ID and To Enrollment Request ID Enter the start enrollment request ID in the From Enrollment Request ID field, and enter the last enrollment request ID to post in the To Enrollment Request ID field. Enrollment request ID values are generated by the system when you enter student enrollment requests. If you are entering only one enrollment request ID, such as for posting a single block enrollment request, enter the value in the From Enrollment Request ID field.

Chapter 33

Working with Enrollment Request Messages

This chapter discusses how to act on enrollment request messages.

Acting on Enrollment Request Messages

This section lists the most frequent messages that the enrollment engine displays when you process an enrollment request, as well as the actions that you should take to resolve these messages. You can access the Message Catalog by navigating to PeopleTools, Utilities, Use, Message Catalog. In the English language, select message set number 14640.

<i>Number</i>	<i>Severity</i>	<i>Message Text</i>	<i>Explanation</i>	<i>Action</i>
3	Error	Not Enrolled in Class, Drop Not Processed.	The requested drop transaction was not processed. No enrollment records for the specified class for this term were found. Verify the class number and term, and resubmit the request.	Check the student's class schedule.
4	Error	Already In Drop Status.	The requested drop transaction was not processed. The class is already in drop status for the term specified. Verify the term and class number, and resubmit the request.	Check student's enrollment status in the class.

Number	Severity	Message Text	Explanation	Action
5	Error	Already Enrolled in Class, Add Not Processed.	The enrollment request was not processed; an enrollment record already exists for the class and term specified. Verify class number and term, and resubmit the request.	Check student's enrollment status in the class.
6	Error	Class %1 Not Enrolled, Class And Wait List Are Full.	The requested enrollment add was not processed. The enrollment limit for the class has been reached, and there is no room on the wait-list.	The class enrollment and wait-list capacities have been reached. Verify these limits on the Schedule of Classes - Enrollment Control page.
7	Error	Not Enrolled, Class %1 Full.	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached. To attempt to wait-list, resubmit the request with the Wait List option selected.	The class enrollment capacity has been reached. Verify the enrollment limit on the Schedule of Classes - Enrollment Control page. The system also displays this message if the available space in the class is subject to reserve capacity requirements.
11	Error	Class Table In Use, Not Available For Drop Request.	The class table is being used by another system resource and is not available for the specified class. The drop request was not processed. Resubmit the request.	Another user is maintaining the class being dropped.

Number	Severity	Message Text	Explanation	Action
12	Error	Enrollment Record In Use, Not Available For Drop Request.	The Enrollment record is in use by another system resource and is not available to process the drop request. Try again later.	Another user or process is accessing the student's enrollment record.
13	Error	Unable to Drop class, will drop below required minimum units for enrollment.	The requested drop transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
14	Error	Unable to Drop class, Corequisites exist.	The requested drop transaction was not processed. Enrollment exists in a corequisite class. Classes must be dropped together.	The class being dropped is a corequisite to another class in the student's class schedule. Check the requisites for the other classes in the student's class schedule. Override requisites if necessary.
17	Error	Time Scheduling Conflict for class %1 and %2, not enrolled.	A scheduling conflict exists with a currently enrolled class. Select another class, or override the time conflict.	
18	Error	Requisites not met for Class, not enrolled.	Requirements have not been met to enroll in the specified class. The enrollment transaction was not processed.	

Number	Severity	Message Text	Explanation	Action
19	Error	Corequisites Not Met For Class, Not Enrolled.	Corequirements necessary to enroll in the class have not be met. The enrollment request was unsuccessful.	The class requires concurrent enrollment in another class. Check the requisites for this class. Override requisites if necessary.
20	Error	Class taken previously, Repeat not allowed.	None.	Review the repeat-for-credit rules for the class on the Course Catalog - Basic Data page.
29	Error	Class %1 Not Waitlisted, Waitlist is Full.	The Drop-To-Waitlist transaction was not processed.	Check the wait-list capacity for the class.
30	Error	Maximum term Unit Load exceeded.	Add transaction not processed. The maximum term unit load would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
31	Error	Record Not Changed, Not on Waitlist	The Change-Waitlist-Position transaction was not processed.	The student is not wait-listed for this class.
32	Error	Enrollment is not allowed for this class: It is outside the Career of Study.	The Add transaction was not processed. Enrollment in this class is not allowed for this academic career.	The student's career has a career pointer rule, or the student's program references a career pointer exception rule, which prevents enrollment in this academic career.

Number	Severity	Message Text	Explanation	Action
36	Error	Error With Grade and Grade Basis For Penalty Drop Reason.	There is a setup error for drops with penalty. The grade is not compatible with the grade basis. Correct the setup. Drop not processed.	Check the drop-with-penalty setup on the Session Calendar 2 page or the Academic Program - Dynamic Date page for the student's primary academic program.
38	Error	%1 to Enroll in Class, Add Not Processed.	Consent is needed to enroll in the class. The add transaction was not processed.	The student must have a permission number to enroll in this class. A permission number can be generated, or a student-specific permission can be granted on the Class Permission page.
39	Message	Permission Number Entered Is Not Valid.	The permission number used is invalid. The transaction was processed without the permission number.	Check the Class Permissions page.
45	Message	Enrollment Drop Date is Past Drop With Penalty Date.	The enrollment drop date is past the pre-established drop with penalty date. Drop was processed as within drop with penalty date.	The class is being dropped after the drop-with-penalty or drop-with-greater-penalty deadline. The enrollment engine still processes the drop and uses the rule from last penalty date defined on the Session Calendar 2 page.

Number	Severity	Message Text	Explanation	Action
48	Error	Auto Enroll Not Processed, Section Not Associated with the Enrollment Section.	The class specified for the auto enrollment function is not associated with the enrollment section of the add transaction. Auto enrollment was not performed.	Check the setup on the Schedule of Classes component. All enrollment sections within the same class association must use the same component.
50	Error	Class Number %1 Not in Active Status. Cannot Enroll.	The add transaction was not processed. The class to be added is not in <i>ACTIVE</i> status for enrollment.	Verify the class status on the Schedule of Classes - Enrollment Control page.
53	Error	Related Class Enrollment Not Completed, Section Not Associated with Enrollment Section.	The related class enrollment function was not processed. The <i>related to</i> class is not associated with the enrollment section of the add transaction.	Check the setup on the Schedule of Classes component. All enrollment sections within the same class association must use the same component.
59	Message	Invalid Access to Override Class Limit.	User does not have access to override class limits. The transaction was processed without the override.	A user's enrollment access ID determines override access. The enrollment engine typically gives this message when an enrollment access group controls enrollment security. The enrollment access ID attached to the user's enrollment access group does not permit this override, or the user does not have time period access to the enrollment function. Check the setup on the Enrollment Group Access page.

Number	Severity	Message Text	Explanation	Action
60	Message	Invalid Access to Override Grade Basis.	User does not have access to override grade basis. The transaction was processed without the override.	See 59.
61	Message	Invalid Access to Override Class Units.	User does not have access to override class units. The transaction was processed without the override.	See 59.
62	Message	Invalid Access to Override Unit Load.	User does not have access to override unit load. The transaction was processed without the override.	See 59.
63	Message	Invalid Access to Override Class Links.	User does not have access to override class links. The transaction was processed without the override.	See 59.
64	Message	Invalid Access to Override Class Permission.	User does not have access to override class permission. The transaction was processed without the override.	See 59.
65	Message	Invalid Access to Override Requisites.	User does not have access to override requisites. The transaction was processed without the override.	See 59.
66	Message	Invalid Access to Override Time Conflict.	User does not have access override time conflicts. The transaction was processed without the override.	See 59.

Number	Severity	Message Text	Explanation	Action
67	Message	Invalid Access to Override Career.	User does not have access to override career. The transaction was processed without the override.	See 59.
68	Message	Invalid Access to Wait List Function.	User does not have access to the wait-list functionality. The transaction was processed without the override.	See 59.
69	Error	Invalid Access to Enrollment Transaction.	User does not have access to enrollment transaction. The transaction was not processed.	The enrollment access ID does not permit access to this function. Check the time period security for the access ID on the Enrollment Security Table page and the session time period deadline on the Session Time Period Table page.
70	Error	Invalid Access to Enrollment With Permission Transaction.	User does not have access to the Enrollment With Permission transaction. The transaction was not processed.	See 69.
71	Error	Invalid Access to Drop Transaction.	User does not have access to the drop transaction. The transaction was not processed.	See 69.
73	Error	Invalid Access to Update Grade Basis.	User does not have access to update grade basis. The transaction was not processed.	See 69.

Number	Severity	Message Text	Explanation	Action
74	Error	Invalid Access to Update Units.	User does not have access to update units. The transaction was not processed.	See 69.
75	Error	Invalid Access the Change Wait List Transaction.	User does not have access to the change wait-list transaction. The transaction was not processed.	See 69.
76	Error	Invalid Access to the Add Grade Transaction.	User does not have access to the add grade transaction. The transaction was not processed.	See 69.
77	Error	Invalid Access to Change Grade.	User does not have access to the change grade transaction. The transaction was not processed.	See 69.
78	Error	Class Table in Use, Not Available for Add Request.	The Class Table is being used by another process and is unavailable for updating. Retry request.	Another user or process is maintaining the class number used for the enrollment transaction.
79	Error	No Valid Appointment Found And Open Enrollment Period Has Not Begun.	The open enrollment period has not begun and no valid enrollment appointment was found. The enrollment request was not processed.	Use the Student Enrollment Appointment page to verify if the student has a valid appointment.
80	Error	Wait List Period Has Ended.	The wait-list request was not processed.	The last date for wait-list defined on the Session Table page has passed.

Number	Severity	Message Text	Explanation	Action
83	Error	Invalid Drop Date; Drop Date is Prior To Add Date.	The drop date entered is prior to the add date of the class being dropped. Re-enter the transaction with the correct date.	Verify the add date for the class. This error condition can occur when attempting to process a retroactive drop.
84	Error	Unit Limit Exceeded For Appointment Period.	The class add transaction was not processed. Adding the class would exceed the unit limit allowed for the appointment period.	Check the student's appointment limits using the Student Enrollment Appointment page.
85	Message	Invalid Access to Override Enroll Action Date.	User does not have access to override enroll action date. The transaction was processed without the override.	See 60.
86	Error	Swap not processed, Hold on record.	There is a hold on this record preventing the swap transaction from being processed. The hold must be removed before the swap is processed.	Check the student's service indicators.
87	Error	Hold on record, Add not processed.	There is a hold on this record, preventing the add from being processed. You must remove the hold to process the add transaction.	Check the student's service indicators.
88	Error	A Required Related Class (component %1) must also be Selected.	There is an additional component required for enrollment that is missing.	The class requires enrollment in a related component. Related components can be selected using the Related 1 and Related 2 fields.

Number	Severity	Message Text	Explanation	Action
89	Message	Invalid Access To Override Service Indicator	The user does not have access to override the service indicator. The transaction was processed without the override.	See 60.
90	Message	Invalid Access to Override Appointment Times.	The user does not have access to override the appointment times. The transaction was processed without the override.	See 60.
91	Error	Maximum Session Unit Load Exceeded.	The maximum session unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session limits using the Student Enrollment Appointment page.
92	Error	Maximum Term Course Load Exceeded.	The maximum term course load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
93	Error	Maximum Session Course Load Exceeded.	The maximum session course load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's course limit on the Student Enrollment Appointment page.
94	Error	Unable To Process Drop, Session Calendar Record Missing.	There is no Academic Session Calendar Record defined for the session of the drop transaction. A session must be defined to process the drop.	A session calendar row must be present to drop a regularly scheduled class. Check the academic calendar setup for the session on the Academic Calendar component.

Number	Severity	Message Text	Explanation	Action
97	Error	Maximum Session No GPA Units Exceeded.	The maximum session No GPA unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
98	Error	Maximum Session Audit Units Exceeded.	The maximum session audit unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
99	Error	Maximum Session Wait Units Exceeded	The maximum session wait unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the student's session unit limits on the Student Enrollment Appointment page.
100	Error	Maximum Term No GPA Units Exceeded.	The maximum term No GPA unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
101	Error	Maximum Term Audit Units Exceeded.	The maximum term audit unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
102	Error	Maximum Term Wait Units Exceeded.	The maximum term wait unit load would be exceeded with the addition of this class. The add transaction was not processed.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.

Number	Severity	Message Text	Explanation	Action
116	Message	Invalid Access to Override Requirement Designation.	The user does not have access to override the requirement designation. The transaction was processed without the override.	See 60.
120	Error	Appointment Audit Unit Limit Exceeded, Class Not Added.	Add transaction not processed. Adding this class would exceed the appointment audit unit limit.	Check the student's unit limits on the Student Enrollment Appointment page.
121	Error	Appointment No GPA Unit Limit Exceeded, Class Not Added.	Add transaction not processed. Adding class would exceed the appointment No GPA unit limit.	Check the student's unit limits on the Student Enrollment Appointment page.
123	Error	Maximum Term Load Exceeded, Units Not Changed.	Units not changed. The maximum term unit limit would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
124	Error	Maximum Session Load Exceeded, Units Not Changed.	Units not changed. The maximum session unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.
125	Error	Maximum Appointment Unit Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
126	Error	Maximum No GPA Session Load Exceeded, Units Not Changed.	Units not changed. The maximum No GPA session unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.

Number	Severity	Message Text	Explanation	Action
127	Error	Maximum Term No GPA Load Exceeded, Units Not Changed.	Units not changed. The maximum term No GPA load would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
128	Error	Maximum Session Audit Load Exceeded, Units Not Changed.	Units not changed. The maximum session audit unit load would be exceeded.	Check the student's session limits on the Student Enrollment Appointment page.
129	Error	Maximum Audit Term Units Exceeded, Units Not Changed.	Units not changed. The maximum audit term units would be exceeded.	Check the unit limits for the student's primary academic program on the Academic Program Table - Enrollment page.
130	Error	Maximum Appointment No GPA Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment No GPA unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
131	Error	Maximum Appointment Audit Load Exceeded, Units Not Changed.	Units not changed. The maximum appointment audit unit load would be exceeded.	Check the student's unit limits on the Student Enrollment Appointment page.
133	Message	Permission to enroll in this class is required.	The class falls outside of the career of study.	The career pointer rules for the student's career or a career pointer exception rule for the student's primary academic program requires that the student have permission to take this class. Assign a permission number on the Class Permission page.

Number	Severity	Message Text	Explanation	Action
137	Error	Withdrawn from Term - Changes are not allowed	The transaction was not processed.	The student has been withdrawn for this term. Verify the student's status in this term on the Term History component.
138	Error	Warning - Enrollment status is Withdrawn.	Although enrollment status is <i>Withdrawn</i> , changes would be applied.	The enrollment engine gives this message when a grade change is made for a student who has been withdrawn from the term.
139	Error	Enrollment status is Cancelled for Term - No Enrollment Activity Allowed	Transaction not processed.	The student enrollment has been cancelled for this term. Verify the student's status in this term on the Term History component.
141	Message	The Requirement Designation Options was set to 'YES' by the enrollment process.	None.	This message appears when a student is enrolled in a class with an optional requirement designation and the Yes option was selected. The enrollment engine displays the same message when the requirement designation is required and is therefore set to yes for all students enrolling in the class.

Number	Severity	Message Text	Explanation	Action
142	Message	Only those with Academic Plan %1 are allowed to take Requirement Designation %2.	The enrollment process set the designation option to <i>NO</i> .	The enrollment engine displays this message when a student is enrolled in a class with an optional requirement designation and the Yes option is selected, but the student failed to meet the requirements for the requirement designation. The same message would appear for a non-optional requirement designation where the student does not meet the requirements.
143	Message	Class %1 is Full, Resectioned to Class %2	The selected class for enrollment is full; the request was processed with the resectioned class.	The enrollment engine displays this message when the Resection option is used in class enrollment control. The system enrolls the student in the resectioned section if the original choice is closed.

Number	Severity	Message Text	Explanation	Action
144	Message	A Grade of %1 has been assigned for this Drop Request.	The drop transaction assigned a grade to the student, leaving the student in <i>drop enrolled</i> status.	The class has been dropped during the drop-with-penalty or drop-with-greater-penalty period defined on the Session Calendar 2 page or the dates calculated by the Dynamic Class Dates process. For dynamically dated classes, use the Dynamic Class Dates page to view or maintain the dates. For OEE classes, use the Student OEE Enroll Data page.
146	Error	Multiple Enrollment not allowed for course, add not processed.	Multiple enrollment for this course is not allowed. The transaction was not processed.	A student can enroll in a the same course only once per term, unless the course permits multiple enrollments in a term (this option is set on the Course Catalog - Catalog Data page). The system also displays this message when a swap between different sections of the same course would result in a penalty grade on the swap from class.
160	Error	Requested change will put units below minimum Term Load. Not processed.	None.	As a result of a drop or swap transaction, the student will drop below the minimum units required by his or her academic program.

Number	Severity	Message Text	Explanation	Action
165	Warning	Auto Enroll sections used, related classes not used.	When specifying both auto enroll sections and related class sections, only the auto enroll sections are used for enrollment. The related classes were ignored.	
195	Message	First Date to Enroll has not been reached - not enrolled	The first date for enrollment has not been reached for the session or from the dynamic class data. Enrollment not allowed.	Check the Session Table page's First Date to Enroll field, or, for dynamically dated classes, the Dynamic Class Dates page.
196	Message	Last Date to Enroll has expired.	The last date for enrollment has expired for the session or from the dynamic class data. Enrollment not allowed.	Check the Session Table page's Last Date to Enroll field, or, for dynamically dated classes, the Dynamic Class Dates page.
197	Message	Student not eligible for enrollment in an OEE course	Student is attempting to enroll in an OEE course but neither the student's career nor student's primary academic program allows OEE enrollment.	The student's primary academic program does not permit enrollment into OEE classes. Verify that the Allow OEE Enrollment option is set correctly on the Academic Program Table component.
203	Message	OEE Date Calc Error: %1, %2.	The OEE date calculation routine has encountered a setup or data problem. Review the type of error in the message text. Enrollment was not processed.	The enrollment engine did not find an OEE dynamic date rule on the dynamic class dates table or at the course offering level. Review the course offering and dynamic class date setup for the class.

Number	Severity	Message Text	Explanation	Action
205	Message	Missing Drop Retain Reason Code	When dropping a course, the enrollment drop retain reason code was not defined from either the Academic Calendar Session, or, if dynamic dates or OEE enrollment are used, the drop retain reason code was not defined from the Academic Program table. The drop was not processed.	An enrollment action reason is required for drop/retain processing. Check the Session Calendar 2 page for regularly scheduled courses. For dynamically dated classes, including OEE classes, the drop/retain reason is entered on the Academic Program Table - Dynamic Dates page.
206	Error	Invalid access to the Requirement Designation Change Transaction	User does not have access to the change Requirement Designation transaction. The transaction was not processed.	See 69.
209	Error	Optional component class %1 is full. Resubmit without this component or waitlist all components.	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached. To attempt to wait-list, resubmit the request with the wait-list option specified. To enroll in the class without the optional component, delete the optional component class number and resubmit.	To attempt to wait-list all components of the class, select the Wait List Okay check box and resubmit the request. To attempt to enroll in the class without the optional component, remove the optional component class number from the related class field and resubmit the request.

Number	Severity	Message Text	Explanation	Action
210	Error	Optional Related Class %1 add not processed. Class and Waitlist are full.	Optional related component is closed, and there is no room on the wait-list. To enroll in the class without the optional component, delete the optional component class number and resubmit.	To attempt to enroll in the class without the optional component, remove the optional component class number from the related class field and resubmit the request.
211	Error	Swap not allowed because the 'swap from' class would receive a penalty grade	This swap would result in a penalty grade for the swap from class, and the swap to class is a different section of the same course.	This message is given if the class does not allow multiple enrollments in a term.
212	Error	Class%1 already wait listed. Enrollment not processed.	Already wait-listed for this related component	The student needs to drop the wait-listed class before he or she can wait-list in another section with the same related non-enrollment section.
213	Error	Available Seats are reserved. Reserved Seat Requirements are not met. Student not enrolled	Available seats are subject to reserve capacity requirements.	Although the class may appear as open in Class Search, the remaining open seats are subject to one or more Reserve Capacity requirements.
214	Error	Permission is required to enroll in this class	This class is scheduled in a session that now requires permission to enroll in classes.	The Enrolment Time period for this session has passed, and students must now obtain instructor or department consent to enroll in classes.

Chapter 34

Using Enrollment-Related Processes

This chapter discusses how to:

- Create historical enrollment records.
- Manage wait lists.
- Process withdrawals and cancellations.
- Purge drop enrollment records.
- Purge shopping cart records.

Creating Historical Enrollment Records

This section discusses how to record historical enrollment records.

Pages Used to Create Historical Enrollment Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Historical Course Enrollment	HIST_CRSE_ENROLLMT	Records and Enrollment, Enrollment Summaries, Historical Course Enrollment, Historical Course Enrollment	Record enrollment data when you do not have access to your PeopleSoft Campus Solutions system, to your historical course catalog, and to a schedule of classes. When you use this page to convert historical enrollment records to the PeopleSoft system, you will most likely run a Structured Query Report (SQR) or other such program to populate the application tables that supports this page. These application tables are HIST_TERM and HIST_TERM_ENRL. You can then access this page to make corrections as necessary.

Page Name	Definition Name	Navigation	Usage
Historical Course Enrollment - Transcript Text	HIST_CRSE_TRNS_TXT	Click the Transcript Text button on the Historical Course Enrollment page.	Enter free-form transcript text. This information, along with the historical enrollment information, appears on the student's transcript.

Recording Historical Enrollment Records

Access the Historical Course Enrollment page (Records and Enrollment, Enrollment Summaries, Historical Course Enrollment, Historical Course Enrollment).

Historical Course Enrollment

Beck, Ana ID: SR0400

Academic Career: UGRD Undergraduate

Find | View All First 1 of 1 Last

*Academic Institution: PSUNV PeopleSoft University

*Term: 0170 1994 Fall

Find | View All First 1 of 1 Last

*Enroll Seq: 1

*Subject Area: ENGLIT English Literature

*Catalog Nbr: 120 Units Taken: 4 Unit Passed: 4

*Official Grade: A Grade Points: 4.00

*Description: Works of Joseph Conrad Transcript Text

Start Date: 9/01/1994 End Date: 12/19/1994

Historical Course Enrollment page

Academic Institution

Select the academic institution for which you want to record historical enrollment data for the student.

Term

Select the term for which you want to record historical enrollment data for the student. The term that you select must be less than or equal to the last term for historical enrollment data for the specified academic career.

Enroll Seq (enrollment sequence)

Indicates the sequence in which a student enrolled in each course within a term. The system by default displays a chronological enrollment sequence number starting with 1, but you can override this default value for any row.

Subject Area

Select the subject area of the course for which you want to record historical enrollment data for the student.

Catalog Number	Enter the catalog number of the course for which you want to record historical enrollment data for the student. Because this is a standalone page, it has no connection to your current course catalog.
Units Taken	Enter the number of units that the student took for the course.
Units Passed	Enter the number of units that the student passed for the course.
Official Grade	Enter the official grade that the student received for the course.
Grade Points	Enter the grade points that the student received for the course.
Description	Enter the title of the course.
Transcript Text	Click to access the Historical Course Enrollment - Transcript Text page, where you can enter free-form transcript text. This information, along with the historical enrollment information, appears on the student's transcript.

Note. Courses entered on the Historical Course Enrollment page *do not* impact Academic Advisement's analysis processes or academic statistics. To include historical courses in advisement processes and academic statistics, you must treat them as transfer courses. Create a fictional academic institution, use the transfer credit process to create pseudo incoming courses, and then map those courses to your academic institution's course equivalencies.

See Also

[Chapter 9, "Setting Up Transfer Credit Processing," Reviewing Examples of Course Equivalencies, page 234](#)
PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Preparing for Data Conversion"

Managing Wait Lists

This section provides an overview of wait list management and discusses how to:

- View a student's wait list position.
- Move students from wait lists to enrollment.
- Purge students from wait lists.

Understanding Wait List Management

The wait list management functionality in Student Records enables you to set processing parameters that define the groups of students to move from wait lists to enrollment into classes within a specific enrollment period. This section discusses:

- Waitlist position numbers.

- Automatic enroll from waitlist.

Waitlist Position Numbers

When a student enrolls or is waitlisted into a class the Enrollment process assigns the next available student position number to the student. For instance, the first student to enroll in a class would get a student position number of 10, the second 20, the third 30, and so on. Student position numbers identify the order in which students enroll into a class. In addition, student position numbers determine the position students hold on the waitlist: the student with the wait list position number of 1 is the student who has the lowest student position number and an enrollment status of waiting.

For example, suppose Mia is the 31st student to try to enroll into a class with an enrollment capacity of 30. She is put on the wait list (has an enrollment status of waiting) and the Enrollment process gives her a student position number of 310. Her waitlist position number is 1, because she is the only student in the class with an enrollment status of waiting. Then a second student, Mitch, puts himself on the waitlist. The system gives him a student position number of 320. Because Mia has a lower student position number than Mitch, the system gives Mitch a waitlist position number of 2. If there is one seat available when you run the Waitlist process, Mia, the student with the lowest waitlist position number, is enrolled (the Enrollment process changes her enrollment status from waiting to enrolled). Mitch then has the lowest position number with an enrollment status of waiting. Therefore, his waitlist position number changes to 1.

In multiple component classes, the Enrollment process assigns students the next available student position number for each component. For this reason, a single student often has different waitlist position numbers for each component. For example, a student could have a student position number of 130 and a wait list position number of 1 for one component, and a student position number of 60 and a waitlist position number of 3 for the related component (depending on how many students were already enrolled and were on the waitlist for each component at the time the student received a student position number).

When the process runs on a class section, it creates an enrollment request. The enrollment request includes all related components of the class. For the enrollment engine to process an enrollment request successfully, all related components must have a seat available for that request. If all related components have a seat available for that request, the enrollment engine enrolls the student into all of the related components. If at least one related component is full, the enrollment engine would produce an error for the request, and the student would not be enrolled into any of the related components.

Note. The Waitlist process runs on non enrollment components as well as on enrollment components. The process creates enrollment requests for students based on their positions on the waitlist in the section on which the process is running (which is not necessarily the enrollment component). Thus, the order in which the process runs on class sections is important, because the process might not enroll students in the order that they would expect, if they expect to be enrolled based on their waitlist position number in a section that was run after a related section.

You can run the Wait List process on a term, session, subject area, course, or class. The process runs on classes in sequential order based on the criteria on which you run the process, and on the key structure of the CLASS_TBL (course ID, course offering number, term, session code, and class section). For example, when you run the process on a term, the process first runs in order of course ID: 000001, 000002, and so on. If two courses have course ID 000001, it runs by course offering number: course 000001, course offering number 1, course 000001, course offering number 2, and so on. In the same way, the process would then use session code (unless you select session as one of your criteria on the Wait List Process page), and then class number. So within a course, course offering number, and session, the process would run on class section 1, class section 2, and so on. Because the Wait List process runs by class section, it would run on a multiple component class that has two lectures (sections 1 and 2) and two labs (sections 1A and 1B), in the following order: section 1, 1A, 1B, 2.

As you can see, the order of your classes and sections in the schedule of classes determine the order in which students are moved from the waitlist into the class for multiple component classes. Suppose you had two multiple component classes that shared a component, such as two biology lectures that share a lab, which have the following class sections: 1 (lecture), 1A (lab), and 2 (lecture). When you run the waitlist process on this class, the process creates enrollment requests for waitlisted students for section 1 and for its related class, section 1A. If seats are available in section 1 and 1A, the process moves students from the waitlist into both components. Then the process runs on section 1A (because section 1A is sequentially next based on the key structure of the CLASS_TBL). If students are still on the waitlist in section 1A (because they are on the waitlist for section 2, which has not yet been run), the process creates enrollment requests for those students. Again, if seats are available in section 1A and section 2, the enrollment engine processes the requests successfully. Finally, the process runs on section 2.

For example, Mia has a waitlist position number of 1 in section 2, and a waitlist position number of 5 in the related section 1A. Additionally, Mitch has a waitlist position number of 3 in section 1A. Because the Wait List process runs on section 1A first, Mia is put into the class after Mitch. The Wait List process evaluates Mia based on her position on the waitlist in section 1A, even though section 2 is the enrollment component.

Automatic Enroll from Waitlist Feature

The Wait List feature is controlled by the Auto Enroll From Wait List and Wait List Capacity options (on the Enrollment Control page of the schedule of classes) and the Last Day For Wait List date (on the Session Table page for classes with traditional academic calendars and on the Dynamic Class Dates page for classes with dynamic academic calendars). In addition, students have a wait list unit limit defined by academic load for terms and sessions within their primary academic programs on the Enrollment page and Session page of the Academic Program Table component.

If you select the Auto Enroll From Wait List option for a class, you can use the wait list process to move qualified students from the class wait list to enrollment into that class as space becomes available. If you do not select this option, you can manually move students from the wait list to enrollment into a class by selecting Override Class Limit on the enrollment processing component. The manual process is best monitored by the instructor of the class.

As you manage your wait lists, you can use the Class Roster page to view students on the wait list for a particular class section. The system performs corequisite and prerequisite checking before placing a student on the waitlist. However, the system does *not* check for a scheduling time conflict before it places a student on a wait list. Scheduling time conflicts and all of the other enrollment edits are performed when the system attempts to move a student from the wait list to enrollment in a class. You can view an individual student's position and status on the wait list for a class by clicking the Wait List Position link. This link appears only for applicable enrollment requests on the enrollment request processing pages.

Enabling the Wait List Process

To enable the wait list process:

1. Set the last date for wait list for sessions on the Session Table page of the Term/Session Table component.
2. Define the maximum wait list units for terms within academic programs on the Enrollment page of the Academic Program Table component.
3. Define the maximum wait list units for sessions within academic programs on the Session page of the Academic Program Table component.
4. Select the Auto Enroll From Wait List check box for classes on the Enrollment Control page of the schedule of classes.

See Also

Chapter 37, "Viewing Class Enrollment Data," Viewing Class Rosters, page 904

Pages Used to Manage Wait Lists

Page Name	Definition Name	Navigation	Usage
Wait List Position	ENRL_REQ_WL	Click the Wait List Position link on the corresponding enrollment processing page.	View a student's status and position on the wait list for a class section.
Wait List Process	RUNCTL_SRWTLST	Records and Enrollment, Term Processing, Waitlist, Waitlist Process, Wait List Process	Move groups of students from class wait lists to enrollment into classes. If you need to manually move students from the wait list to enrollment into a class, you must drop the student from the wait listed class then add the student into the class with the appropriate overrides selected.
Wait List Purge	RUNCTL_SRWTLSTPURG	Records and Enrollment, Term Processing, Waitlist, Waitlist Purge, Wait List Purge	Run the Wait List Purge process to delete groups of students in waiting status based on the run parameters that you specify. The Wait List Purge process enables you purge the wait list for more than just one class. You can use the process to purge the wait list for all classes in an entire term, academic career, session, subject area, or campus based on the your run parameters. Run the purge process on past terms when information about a student being waitlisted is no longer pertinent.

Viewing a Student's Wait List Position

If your institution has licensed PeopleSoft Campus Self Service, your students can also view their statuses and positions directly over the web. Wait list position numbers appear on the class schedule.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Enrollment," Viewing a Class Schedule

Moving Students from Wait Lists to Enrollment

Access the Wait List Process page (Records and Enrollment, Term Processing, Waitlist, Waitlist Process, Wait List Process).

Institution	Select the academic institution for which you want to move groups of students from class wait lists to enrollment into a class.
Term	Select the term for which you want to move groups of students from class wait lists to enrollment into a class.
Session	If you want to limit wait list processing to a specific session, select a value.
Subject Area	If you want to limit wait list processing to a specific subject area, select a value. If you select a value for this field, the Course ID field and Class Nbr field become unavailable for edit.
Course ID	If you want to limit wait list processing to a specific course, select a value. If you select a value for this field, the Subject Area field and Class Nbr field become unavailable for edit.
Class Nbr (class number)	If you want to limit wait list processing to a specific class, select a value. If you select a value for this field, the Subject Area field and Course ID field become unavailable for edit.
Wait List Process Switch	The wait list process switch instructs the process how to evaluate wait list candidates. Select <i>Y</i> to process all <i>new</i> wait list candidates eligible for wait list evaluation. Select <i>A</i> to process <i>all</i> wait list candidates eligible for wait list evaluation. For example, a class has five students on the wait list and three spaces become open in the class. When you run the wait list process, it fills the three spaces, and two students remain on the wait list. At this point the class is no longer new to the wait list process. The only way it would be evaluated again is if space opened in the class and you selected <i>A</i> as the wait list process switch value.

Run the Wait List COBOL/SQL process (SRPCWAIT) as needed.

The process generates a new enrollment request for the student and displays one of the following enrollment status reasons on the new request: *RCAP* (reserve slots full), *FULL* (section is full), *CREQ* (corequisite enrollment), *ALIM* (appointment limit exceeded), *TLIM* (term limit exceeded), *SLIM* (session limit exceeded), *TIME* (time conflict exists), *RCMP* (related component), *TIMR* (time conflict resolved), or *EWAT* (enrolled from wait list). You can view these enrollment requests through the Block Enroll component.

If a class has reserve capacity rules and space opens in a reserve capacity group, the process evaluates whether students on the wait list meet these reserve capacity rules. If no students meet the rules, then the process moves no one from the class wait list to enrollment into the class. If a class has multiple reserve capacity groups and space opens in more than one group *and* a student matches the criteria of more than one reserve capacity group, the system enrolls the student into the first reserve capacity group it finds where the student meets the reserve capacity rules.

Purging Students From Wait Lists

Access the Wait List Purge page (Records and Enrollment, Term Processing, Waitlist, Waitlist Purge, Wait List Purge).

Wait List Purge

Run Control ID: PS

[Report Manager](#)[Process Monitor](#)

Run

Sequence Number: 1

*Academic Institution: PSUNVPeopleSoft University

*Term: 05302004 Fall

Academic Career: Undergrad

Session: Regular

Subject Area:

Class Nbr:

Campus:

From Date:

To Date:

Last Date for Wait List:

Wait List Purge page

Sequence Number	The system displays a default sequence number. It is for internal processing purposes only.
Academic Institution	Select the academic institution for which you want to purge students from wait lists.
Term	Select the term for which you want to purge students from wait lists.
Academic Career	If you want to purge students from wait lists for classes within a specific academic career, select a value for this field. Note. This field and the remaining fields on this page are optional. They provide the means of searching for wait lists by various parameters.
Session	If you want to purge students from wait lists for classes within a specific session, select a value for this field.

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Subject Area	If you want to purge students from wait lists for a specific class subject area, select a value for this field.
Class Nbr (class number)	If you want to purge students from wait lists for a specific class, select a value for this field.
Campus	If you want to purge students from wait lists for classes at a specific campus, select a value for this field.
From Date	If you want to purge from wait lists the students in waiting status with a class start date greater than or equal to a certain date, enter the date in this field.
To Date	If you want to purge from wait lists the students in waiting status with a class start date less than or equal to a certain date, enter the date in this field. The system displays, by default, the value in the From Date field.
Last Date for Wait List	Enter a value in this field to have the process search for active wait lists in which the class <i>last date for wait list</i> value is less than or equal to the value that you specify here. Define last date for wait list values on the Session Table page for classes with traditional academic calendars.

Processing Withdrawals and Cancellations

This section provides an overview of withdrawal and cancellation processing, lists common elements, and discusses how to:

- Post withdrawals and cancellations for terms.
- Post withdrawals and cancellations for sessions.
- Resubmit failed withdrawal and cancellation requests.
- View withdrawal and cancellation request status.

See Also

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees"

Understanding Withdrawal and Cancellation Processing

In Student Records, you can enter and post withdrawals or cancellations for a term or session on a student-by-student basis through the Student Records Term Withdrawal COBOL/SQL process (SRPCWDPR). When you withdraw or cancel a student from a term, the process performs a series of session withdrawals or cancellations to complete the term withdrawal or cancellation. A student cannot be cancelled from a session, and therefore a term, in which grades have been posted. The system prevents this with an error message and does so because enrollments for cancelled terms and sessions are always excluded from the transcript. Withdrawals can be processed when grades are present; however, the classes with grades will be excluded from the process. A warning message appears when you select the withdrawal code for a session or term where grades are present.

Important! If you have not calculated the landmark calendar dates for the affected class enrollments, the Student Records Term Withdrawal process fails the entire withdrawal or cancellation request.

For term and session *withdrawals*, the Student Records Term Withdrawal process determines the deadline by comparing the last date of attendance entered on the Term Withdrawal or Session Withdrawal page to the withdrawal deadlines that you set on the Session Calendar 1 page or to the withdrawal deadlines that the Dynamic Class Dates process calculates and displays on the Dynamic Class Data page or Student Enroll OEE page. The Student Records Term Withdrawal process then generates and processes the enrollment requests for each impacted student enrollment record (STDNT_ENRL).

For withdrawals from traditional class enrollments, the process updates the impacted student enrollment records as follows:

- If the last date of attendance is less than or equal to the withdraw-without-penalty deadline on the Session Calendar 1 page, the process updates the last enrollment action reason to the withdraw-without-penalty reason set on the Session Calendar 1 page.
- If the last date of attendance is less than or equal to the withdraw-with-penalty deadline, the process determines the student's grading basis for the class, then assigns to the impacted student enrollment record the penalty grade value that is set on the Grading Scheme Table page for that grading basis.

If the penalty grade is not defined, the process assigns the penalty grade according to the grading basis and grade set on the Session Calendar 1 page. Depending on how the grade is set up, the process can reduce in progress units, which can potentially affect the student's academic load and financial aid load.

- If the last date of attendance is less than or equal to the withdraw-with-greater-penalty deadline, the process functionality parallels that of the withdraw-with-penalty functionality.

For withdrawals from dynamic date and OEE class enrollments, the process updates the impacted student enrollment records as follows:

- If the last date of attendance is less than or equal to the withdraw-without-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process updates the last enrollment action reason to the corresponding reason value set on the Dynamic Date page of the Academic Program Table component for the student's primary academic program.

- If the last date of attendance is less than or equal to the withdraw-with-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process determines the class grading basis, then assigns to the impacted student enrollment record the penalty grade value that is set on the Grading Scheme Table page for that grading basis.

If the penalty grade is not defined, the processes assigns the penalty grade according to the grading basis and grade set on the Dynamic Date page of the Academic Program Table component for the student's primary academic program. Depending on how the grade is set up, the process can reduce in progress units, which can potentially affect the student's academic load and financial aid load.

- If the last date of attendance is less than or equal to the withdraw-with-greater-penalty deadline on the Dynamic Class Data page or Student Enroll OEE page, the process functionality parallels that of the withdraw-with-penalty functionality.

Note. The system uses the session calendar (if it exists) when it fails to find a Dynamic Class Dates table row or the appropriate Academic Program table dynamic dates field when processing withdrawals from non-OEE dynamically dated classes.

Regardless of the enrollment and withdrawal types, the Student Records Term Withdrawal process also does the following for term and session withdrawals.

- Updates the withdraw code on the affected student session (STDNT_SESSION) records to a value of withdrew.
- Updates the withdraw code on the affected student career term (STDNT_CAR_TERM) records to a value of withdrew for term withdrawals only.

Note. The process does not update the student career term record for session withdrawals so that the student can still enroll in other sessions within the term.

For term and session *cancellations*, the cancel deadlines (Session, Dynamic Date, or OEE) are used only to provide a warning to the user because the cancellation process always has the same impact—any enrolled (but not graded) classes are dropped without penalty and the student's session and term (for term cancellations) withdraw codes are updated to Cancelled.

Note. Note. A student cannot be cancelled from a session, and therefore a term, in which grades have been posted. The system prevents this with an error message and does so because enrollments for cancelled terms and sessions are always excluded from the transcript.

Common Elements Used to Process Withdrawals and Cancellations

Errors

If reasons exist that prevent a successful withdrawal or cancellation, click this link to access the Term Withdrawal Run Status page, where you can check the run status and error message text for the request.

Last Date of Attendance	The system by default sets the last date of attendance to the withdrawal/cancel date, but you can override the value. The Student Records Term Withdrawal process uses the last date of attendance to determine the deadlines, reasons, grading bases, and penalties for withdrawals from dynamic class date and OEE enrollments. The process also uses this date for financial aid and refund calculation purposes. If you override the last date of attendance value, you must recalculate the student's tuition based on the new date you enter.
Post Session Withdrawal	See definition for Post Term Withdrawal.
Post Term Withdrawal	Click to post the withdrawal or cancellation to the student's record. Before completing the posting request, the system verifies that the student has other enrollments for the term or session within the academic career. If the posting request causes the student to have no other enrollments in the term or session within the academic career, the system then identifies the student's billing careers on the student's career term record. If the student has a billing career that is the same as the academic career from which the student is withdrawing, the system stops processing the posting request and instructs you to change the student's billing career to an academic career in which the student has enrollments for the term or session. This edit prevents you from inadvertently billing a student based on an academic career in which the student has no enrollments for the term. Define a student's billing career by academic career on the Term Activation page. For example: a student is active in a term as both a graduate and undergraduate, and the student's billing career for both academic careers within the term is her or his undergraduate career. If the student is enrolled for classes in both the graduate and undergraduate career for the term and you attempt to withdrawal the student from her or his undergraduate career for the term, the system stops processing and issues you a warning instructing you to change the billing career for that student's graduate career term record to an academic career other than the undergraduate career.
Success	Click to access the Term Withdrawal Run Status page, where you can view the message log for the request.
Withdrawal \ Cancel	Select whether you want to process a withdrawal or cancellation. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. <i>Cancelled:</i> Select to cancel all of the student's class enrollments for the specified term or session. Posting a student's term cancellation request refunds 100% of her or his fees. <i>Withdrew:</i> Select to withdraw the student from all class enrollment for the specified term or session. Posting a student's term withdrawal request refunds her or his fees according to the adjustment calendar associated with the student's tuition group.
Withdrawal \ Cancel Date	Enter the date that the Student Records Term Withdrawal process uses as the action date for the withdrawal or cancellation.

Withdrawal \ Cancel Reason Select the withdrawal/cancel reason that Student Financials uses for adjustments. Modification of these translate values requires significant programming effort.

Pages Used to Process Withdrawals and Cancellations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Term Withdrawal	WITHDRAWAL	Records and Enrollment, Student Term Information, Term History, Term Withdrawal	Process student withdrawals and cancellations for all sessions within an entire term.
Session Withdrawal	STDNT_SESSION_WDWL	Records and Enrollment, Student Term Information, Term History, Session Withdrawal	Process student withdrawals and cancellations for one session within a term rather than from all sessions within the entire term.
Term Withdrawal / Cancellation	RUNCTL_SRPCWDPS	Records and Enrollment, Term Processing, Withdrawal and Cancellation, Term Withdrawal/Cancellation, Term Withdrawal / Cancellation	Resubmit failed term and session withdrawal or cancellation requests. The Withdrawal / Cancellation process is designed specifically to resubmit failed withdrawal requests. You can view the status of a request on the Term Withdrawal Run Status page. The process impacts Student Financials because withdrawals and cancellations affect tuition calculation.
Term Withdrawal Run Status	TERM_WD_RUN_STATS	Records and Enrollment, Term Processing, Withdrawal and Cancellation, Term Withdrawal Status, Term Withdrawal Run Status	View the status and process messages for enrollment requests generated by the withdrawal and cancellation process so that you can determine the changes that you must make to a request or a student's records To successfully post a request. You can also use this page as a record for all withdrawal and cancellation requests submitted through the Term History component.

Posting Withdrawals and Cancellations for Terms

Access the Term Withdrawal page (Records and Enrollment, Student Term Information, Term History, Term Withdrawal).

The screenshot displays the 'Term Withdrawal' page for student Ana Beck (SR0400). The page has a navigation bar with tabs: Term Statistics, Cumulative Statistics, Term Withdrawal (selected), Session Withdrawal, and Academic Standing. Below the navigation bar, the student's name and ID are shown. The main form area contains the following fields and values:

- Academic Career:** Undergraduate
- Academic Institution:** PeopleSoft University
- Term:** 2003 Spring
- Academic Level - Term Start:** Freshman
- Pro-Rata Eligible:** ☒ (A 'Post Term Withdrawal' button is visible next to this field)
- Withdrawal \ Cancel:** Withdraw
- Withdrawal \ Cancel Reason:** (Empty dropdown)
- Withdrawal \ Cancel Date:** 10/01/2004
- Last Date of Attendance:** 10/01/2004
- Override Withdrawal Schedule:** (Empty field with a search icon)

Term Withdrawal page

Important! Posting a student's term cancellation request refunds 100 percent of the student's fees. Posting a student's term withdrawal request refunds her or his fees according to the adjustment calendar associated with the student's tuition group.

Academic Institution	The academic institution for which you want to process the student's withdrawal or cancellation request.
Term	The term for which you want to process the student's withdrawal or cancellation request.
Academic Level - Term Start	The student's academic level at the start of the specified term.
Pro-Rata Eligible	Select to enable pro-rata refunding—a refund to a student attending your academic institution for the first time and withdrawing on or before the 60 percent point in time. Clear this check box to not have the student considered for such a refund. Most U.S. academic institutions do not issue refunds after the 60 percent point in time.
Override Withdrawal Schedule	Select the override withdrawal schedule value. These values are specifically for refund calculations and are defined by Student Financials.

See Also

Chapter 34, "Using Enrollment-Related Processes," Viewing Withdrawal and Cancellation Request Status, page 846

Chapter 30, "Maintaining Student Career Term Records," page 699

PeopleSoft Student Financials 9.0 PeopleBook, "Calculating Tuition and Fees," Recalculating Tuition and Fees After Enrollment Cancellation

PeopleSoft Student Financials 9.0 PeopleBook, "Setting Up Tuition Controls, Criteria, Equations, and Waivers," Setting Up Adjustment Calendars

Posting Withdrawals and Cancellations for Sessions

Access the Session Withdrawal page (Records and Enrollment, Student Term Information, Term History, Session Withdrawal).

Term Statistics

Cumulative Statistics

Term Withdrawal

Session Withdrawal

Academic Standing

Ana BeckSR0400

Find | View All

First1 of 1Last

Academic Career:

Undergraduate

Find | View All

First1 of 7Last

Academic Institution:

PeopleSoft University

Term:

2003 Spring

Find | View All

First1 of 1Last

Session:

Units Taken for Progress:

0.000

Post Session Withdrawal

*Withdrawal \ Cancel:

Withdrew

Withdrawal \ Cancel Reason:

Withdrawal \ Cancel Date:

10/01/2004

Last Date of Attendance:

10/01/2004

Session Withdrawal page

- Session

Select the session for which you want to process the student's withdrawal or cancellation request.
- Units Taken for Progress

The system displays the student's in-progress units for the specified session.

See Also

[Chapter 34, "Using Enrollment-Related Processes," Posting Withdrawals and Cancellations for Terms, page 844](#)

[Chapter 30, "Maintaining Student Career Term Records," page 699](#)

Resubmitting Failed Withdrawal and Cancellation Requests

Access the Term Withdrawal / Cancellation page (Records and Enrollment, Term Processing, Withdrawal and Cancellation, Term Withdrawal/Cancellation, Term Withdrawal / Cancellation).

When the Term Cancellation process is run in the Student Financials application, that process generates a cancellation request. To process the cancellation request, enter the request number on this page and run the Student Records Term Withdrawal process (SRPCWDPR).

From Term Withdrawal Request

Enter the request number for the beginning of the range of failed term withdrawal and cancellation requests that you want to resubmit for processing.

To Term Withdrawal Request

Enter the request number for the end of the range of failed term withdrawal and cancellation requests that you want to resubmit for processing.

Term Withdrawal Run Status

Click to access the Term Withdrawal Run Status page, where you can view the message log for a specific term withdrawal or cancellation request.

Run the Term Withdrawal COBOL/SQL process (SRPCWDPR) as needed.

Viewing Withdrawal and Cancellation Request Status

Access the Term Withdrawal Run Status page (Records and Enrollment, Term Processing, Withdrawal and Cancellation, Term Withdrawal Status, Term Withdrawal Run Status).

See Also

[Chapter 33, "Working with Enrollment Request Messages," page 811](#)

Purging Drop Enrollment Records

Class drops are kept in the student's academic record if a student drops from a course while the *drop retain record* date is defined on the academic calendar for the session in which the student was enrolled. At some point, your institution might decide to purge the system of these retained drop enrollment records. The drop purge process affords you this functionality. Run the purge process on past terms only when information about a student's drop enrollment record is no longer pertinent.

This section discusses how to delete drop enrollment records from your system.

Page Used to Delete Drop Enrollment Records

Page Name	Definition Name	Navigation	Usage
Drop Purge Process	RUNCTL_SRDRPPURGE	Records and Enrollment, Term Processing, End of Term Processing, Drop Purge, Drop Purge Process	Run the Drop Purge SQR process (SRDRPURG) to delete drop enrollment records from your system based on the parameters you specify.

Deleting Drop Enrollment Records

Access the Drop Purge Process page (Records and Enrollment, Term Processing, End of Term Processing, Drop Purge, Drop Purge Process).

Drop Purge Process

Run Control ID: PS

Report Manager

Process Monitor

Run

*Academic Institution:

PSUNV

PeopleSoft University

*Term:

0450

2001 Fall

Find | View All

First

1 of 1

Last

Sequence Number:

1

Academic Career:

Undergrad

Session:

From Date:

To Date:

Subject Area:

Class Nbr:

Campus:

MAIN

Enrollment Status Reason:

Drop Purge process page

- Academic Institution

Select the academic institution for which you want to purge drop enrollment records.
- Term

Select the term for which you want to purge drop enrollment records.

Sequence Number	The system displays a default sequence number. It is for internal processing purposes only.
	Note. This field and the remaining fields on this page are optional. They provide the means of purging drop enrollment records by various parameters.
Academic Career	If you want to purge drop enrollment records within a specific academic career, select a value.
Session	If you want to purge drop enrollment records within a specific session, select a value.
From Date	If you want to purge student enrollment records with a class start date (as defined on the CLASS_TBL) greater than or equal to a specific date, enter the date.
To Date	If you want to purge student enrollment records with a class start date (as defined on the CLASS_TBL) less than or equal to a specific date, enter the date.
Subject Area	If you want to purge drop enrollment records for a specific class subject area, select a value.
Class Nbr (class number)	If you want to purge drop enrollment records for a specific class, select a value.
Campus	If you want to purge drop enrollment records at a specific campus, select a value.
Enrollment Status Reason	If you want to purge only the drop enrollment records that have a specific enrollment status reason attached to them, select the enrollment status reason. For example, you can purge drops that have an enrollment status reason of <i>Drop Wait</i> and that meet your other criteria. Enrollment status reasons appear in the Status/Reason field on pages within enrollment components.

Purging Shopping Cart Records

This section discusses how to purge Shopping Cart records.

Page Used to Purge Shopping Cart Records

Page Name	Definition Name	Navigation	Usage
Shopping Cart Purge	SSR_RUN_WSHLST_PRG	Records and Enrollment, Term Processing, End of Term Processing, Shopping Cart Purge	Run the Shopping Cart Purge application engine process (SSR_WISHLPRG) to purge Shopping Cart data for past terms.

Purging Shopping Cart Records

Access the Shopping Cart Purge page (Records and Enrollment, Term Processing, End of Term Processing, Shopping Cart Purge).

Shopping Cart Purge

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Select	Academic Institution	Academic Career	Term	Self-Service Enroll Hide Date	Term Ending Date
☐	Great Lakes University	Undergraduate	2009 Fall	12/11/2009	12/11/2009
☐	PeopleSoft University	Undergraduate	2001 Spring	05/18/2011	05/18/2001
☐	PeopleSoft University	Undergraduate	2005 Spring	05/08/2010	05/08/2005
☐	PeopleSoft University	Undergraduate	2006 Fall	12/12/2006	12/12/2006
☐	PeopleSoft University	Undergraduate	2009 Fall	12/12/2010	12/12/2009
☐	PeopleSoft University	Undergraduate	2010 Spring	05/08/2010	05/08/2010

Select All
Clear All

Refresh Grid

Shopping Cart Purge page

The Shopping Cart Purge page displays in a grid all existing rows in the Shopping Cart table (SSR_REGFORM) grouped by distinct institution, academic career and term combinations. Select the records that you want to purge and run the Shopping Cart Purge process.

Chapter 35

Managing Post Enrollment Requirement Checking

This chapter provides an overview of post enrollment requirement checking setup and discusses how to:

- Manage the enrollment requirement roster.
- Run batch post enrollment requirement checking.
- Print batch enrollment requirement rosters.
- Process batch drop requests for post enrollment requirements.
- Define enrollment requirement note types.
- Purge post enrollment requirement data.

Understanding Post Enrollment Requirement Checking Setup

Complete these steps to set up post enrollment requirement checking:

1. Define your enrollment requirements (See Setting Up Enrollment Requisites)
2. Attach enrollment requirements to course offerings and/or class association records.
3. Define student records installation related to enrollment requirements.
4. Define enrollment requirement note values.
5. Enroll students.

If you plan to use communications for post enrollment requirement checking, use the instructions in the following document to set up communications and then use the 3Cs process to create and generate the communication:

See: PERC Communications Setup and Processing.pdf. This document is included in the PERC Documentation Package which is posted to My Oracle Support.

See Also

[Chapter 3, "Defining Student Records Installation Settings," page 7](#)

[Chapter 7, "Setting Up Enrollment Requisites," page 131](#)

Managing the Enrollment Requirement Roster

This section discusses how to:

- Use the Enrollment Requirement Roster (Summary) page
- Track post enrollment requirement checking transaction history.

Pages Used to Manage Enrollment Requirement Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Requirement Roster (Summary)	SSR_REQS_RSTR_SUMM	Curriculum Management, Enrollment Requirements, Post Enroll Req Checking, Enrollment Requirement Roster, Enrollment Requirement Roster (Summary)	View the Enrollment Requirement Roster, track the enrollment requirement status of students, run post enrollment requirement checking, and process drop requests for non-compliance in on-line mode.
Enrollment Requirement Roster (Detail)	SSR_REQS_RSTR_DTL	Select the Detail View option on the Enrollment Requirement Roster (Summary) page.	View detailed information about how the status on the requirement was evaluated.
Enrollment Message Log	SSR_REQS_ENRL_MSG	Click the Process Status link on the Enrollment Requirement Roster (Summary) page.	View messages that are generated by the enrollment for the transaction requested.
Tracking of Key Transactions & User Notes	SSR_REQS_TRACKING	Click the Tracking link in the Audit / Information Links tab on the Enrollment Requirement Roster (Summary) page.	View post enrollment requirement checking transaction history and view and add notes.

Using the Enrollment Requirement Roster (Summary) Page

Access the Enrollment Requirement Roster (Summary) page (Curriculum Management, Enrollment Requirements, Post Enroll Req Checking, Enrollment Requirement Roster, Enrollment Requirement Roster (Summary)).

Enrollment Requirement Roster (Summary)

2010 Spring | Regular Academic Session | PeopleSoft University | Undergraduate

CHEM 460 - 1 (3061)

Biochemistry (Lecture)

Days and Times	Room	Instructor	Dates
Mo 4:00PM-5:00PM	TBA	Staff	01/24/2010 - 05/08/2010

Enrollment Requirements:

CHEM 460 is open only to Honors students who have completed CHEM 201 (3 units minimum grade of C) and a BIOLOGY 100 series course (3 units minimum grade of C)

Go To

[Run Post Enrollment Requirement Checking](#)

[Process Drops for Non-Compliance](#)

Enrollment Capacity 35

☒ Review Complete for Batch Drop Processing

Select Display Option:

☒ Summary View

☐ Detail View

▼ Set Filter Options

filter

Enrollment Status:

Display

☒ Enrolled (10)

☒ Waitlisted (0)

☐ Dropped (0)

Most Recent Requirement Status:

Display students in non-compliance

☒ Not Satisfied (3)

☒ Conditionally Satisfied (6)

Display other students

☐ Enrollment Component (0)

☐ Overridden (0)

☐ Permitted (0)

☐ Satisfied (1)

☐ Unknown (0)

Enrollment Requirement Roster (Summary) page (1 of 2)

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853

Enrolled Students								Customize	Find	First	1-9 of 9	Last
Requirement Data		Audit / Information Links										
Select	ID	Name	Drop / Approved Indicator	Enrollment Req Status	Post Enroll Req Status	Status	Status Note					
1	☐	SR12446	Beale,Natalie		Conditional	Conditional	Enrolled					
2	☐	SR12444	Campbell,Morgan	Drop Request	Conditional	Not Satisfied	Enrolled	PERC Drop - penalty grade				
3	☐	SR12442	Coldrick,Annie		Conditional	Conditional	Enrolled					
4	☐	SR12445	Eley,Adam	Drop Request	Conditional	Not Satisfied	Enrolled	PERC Drop - penalty grade				
5	☐	SR12441	Hyde,Max	Drop Request	Conditional	Not Satisfied	Enrolled	PERC Drop - penalty grade				
6	☐	SR12449	Keen,Stephanie		Conditional	Conditional	Enrolled					
7	☐	SR12443	Powell,Nicholas		Conditional	Conditional	Enrolled					
8	☐	SR12448	Quinn,Abigail		Conditional	Conditional	Enrolled					
9	☐	SR12447	Slocombe,Lewis		Conditional	Conditional	Enrolled					

[Select All](#) [Clear All](#) [Go to top](#)

▼ Run Post Enrollment Requirement Checking

Run Post Enrollment Requirement Checking for selected students

Set Drop Request Indicator for Students in Non-Compliance

☐ If process results in a status of Conditionally Satisfied
☐ If process results in a status of Not Satisfied

▼ Process Drops for Non-Compliance

For students listed above, process drops for:

☒ selected students
☐ students where Drop Request Indicator is selected
☐ students with a post enrollment requirement status of: ☐ Conditionally Satisfied ☐ Not Satisfied
☐ Override Action Date to:

Enrollment Requirement Roster (Summary) page (2 of 2)

The Course Information and Enrollment Requirements group boxes can be collapsed and expanded. Use the Student Records Installation-Enrollment Requirement Roster page to select a default appearance for the group boxes.

Click a class link to access the Class Detail page. View the enrollment requirements for the class as defined on Adjust Class Associations, Class Requisites page.

Go To

The Go To links appear for page processing if the related check boxes—Allow Post Enrollment Requirement Checking to be run from Enrollment Requirement Roster and Allow Drop Processing to be run from Enrollment Requirement Roster—are selected on the Student Records Installation-Enrollment Requirement Processing page. Click the Go To links to access the related group boxes further down this page. If the check boxes are not selected on setup, the Go To links are not available.

Review Complete for Batch Drop Processing

This check box appears if the check box for Drop Review for Batch Processing is selected on the Student Records Installation-Enrollment Requirement Roster page. Select the check box to indicate that the post enrollment requirement status has been reviewed for non-compliant students—the batch drop process selects only those classes for which the check box has been selected.

Select Display Option

The Enrollment Requirement Roster is available in two views: a summary view and a detailed view. Select the Summary View option to see the enrollment and post requirement status of students enrolled in the class. The Summary view page is discussed in this documentation.

Select the Detail View option to see detailed information about how a student has or has not met the enrollment requirements for the class. The Post Enrollment Requirement Status area of the page displays status information based on the last time that post enrollment requirement checking was run for the student. The Detail view allows you to access the Audit and Information Links as found on the Summary view. You can also view or set the Drop Request /Approved indicator.

Set Filter Options

The Set Filter Options group box can be collapsed and expanded. Use the Student Records Installation-Enrollment Requirement Roster page to select a default appearance for the group box.

The selections in this group box appear by default based on the setup page. You can change the selections here.

Enrollment Status and Most Recent Requirement Status

Select the statuses that you want to view in the Enrollment Requirement Roster student grid.

OEE Start Date

The OEE Start Date field appears when a class is scheduled within an OEE session. It is an optional field. Enter the date for which you want to filter students who have an OEE start date equal to or later than the defined date.

Most Recent Requirement Status: Display students in non-compliance and **Most Recent Requirement Status: Display other students**

The count for each status is shown in parentheses next to the status. Although the Enrollment Status count includes all students, the Most Recent Requirement Status count is based on the number of students with the selected Enrollment Status—for example, if you are viewing only Enrolled Students, the count shown for Most Recent Requirement Status includes only those students with an Enrollment Status of *Enrolled*.

The statuses are:

- **Not Satisfied:** The student has not met the enrollment requirement status for the class.
- **Conditionally Satisfied:** The student has conditionally met the enrollment requirement using in-progress course work. After the course work is completed and grades are posted, post enrollment requirement checking should be run to determine if the student has satisfied the enrollment requirement.
- **Enrollment Component:** The student was enrolled using the enrollment component, which does not check for enrollment requirements.
- **Permitted:** The enrollment requirement for the class was satisfied through a permission.

Note. If the process is run for students with this status, the permission is not considered as part of the post enrollment requirement checking process. The student is re-evaluated.

- **Overridden:** The enrollment requirement for this class was satisfied by using an enrollment requirement override.

Note. If the process is run for students with this status, the override is not considered as part of the post enrollment requirement checking process. The student is re-evaluated.

- **Satisfied:** The student has met the enrollment requirement for this class.
- **Unknown:** No requirement status exists. This value typically appears when a requirement was added to the class after the student was enrolled or the student was enrolled in the class before post enrollment requirement processing was implemented.

Note. Students who enrolled in classes before the implementation of the Post Enrollment Requirement Checking feature will not have an enrollment requirement status and will appear as Unknown on the Enrollment Requirement Roster.

If you choose to run Post Enrollment Requirement Checking for the roster, the appropriate post enrollment requirement status will be assigned.

Filter

Click the filter button to refresh the Enrollment Requirement Roster student grid.

Enrollment Requirement Roster Student Grid: Requirement Data Tab

Select the Requirement Data tab.

Select

Use this check box to:

- Select students to whom a notification is to be sent.
- Select students to be included in page processing—run post enrollment requirement checking or process drops for non-compliance of enrollment requirements.

Process Status

Sometimes a Process Status column appears between the Select and ID columns. Click the Process Status link to access the Enrollment Message Log page. Examples include when post enrollment requirement checking is run and the message displays information about the new status—for example, Enrollment Requirement is met conditionally. It is likely that this is due to a pending grade from a previous term. Another example is Enrollment Requirement is not met for the Class, action required. Enrollment Requirements for the class have not been met. The student may need to be administratively dropped from the class for non-compliance of enrollment requirements.

Drop/Approved Indicator

This is an optional field. The field is available after post enrollment requirement checking has been run. The field is available only for students who have a non-compliant post enrollment requirement status of *Conditional* or *Not Satisfied* and an enrollment status of *Enrolled* or *Waitlisted*.

Decision makers can set the indicator value to *Approved* for enrolled students if they consider the student should remain enrolled in the class even if the student's post enrollment status is non-compliant. An example might be if a cumulative GPA of 3.0 is required for the course and as a result of the student's grades from the previous term, the student now has a 2.9 GPA.

Set the indicator value to *Drop Request* if an enrolled student is to be dropped from the class for non-compliance of enrollment requirements. If a student is wait listed, and the student should be dropped from the waitlist for non-compliance, set the value to *Drop Request*. Use the indicator if you will be dropping students using the option: *when Drop Request Indicator is selected*.

Enrollment Req Status (Enrollment Requirement Status)

Displays the enrollment requirement status of a student at the point of registration. Click on the Enrollment Req Status link for a student to access the Enrollment Requirement Roster—Detail View with the enrollment requirement status information area expanded.

Post Enroll Req Status (Post Enrollment Requirement Status)	The post enrollment requirement status appears after the post enrollment requirement status checking process has been run. The process can be run multiple times. The value shown is the most current post enrollment requirement status. Click on the Post Enroll Req Status link for a student to access the Enrollment Requirement Roster–Detail View with the post enrollment requirement status information area expanded.
Status	This column appears only if more than one enrollment status is selected within the Set Filter Options group box. When more than one status is selected, the student's enrollment status appears in this field.
Status Note	This column displays additional information such as a student's wait list position, penalty grade, graded, previously waitlisted, withdrawn, and if the drop was initiated by PERC. For example, if a student is dropped through the Post Enrollment Requisite Checking process the status note reads <i>PERC Drop</i>. Note. When a class is dropped using the action reason code of <i>PERC</i>, the enrollment record is retained regardless of the Academic Calendar date for the drop delete deadline.
notify selected students	Click the Notify Selected Students button to access the Send Notification (SSS_NOTIFY) page to send email notifications to selected students. If a notification failure occurs, the sender receives a message indicating the type of failure, for example, host unknown. If no email account exists for a selected student, then on the Enrollment Requirement Roster, a Process Status column appears with the message <i>No Email Address</i> next to the student.

Enrollment Requirement Student Grid: Audit / Information Links Tab

Select the Audit / Information Links tab.

Enrolled Students							
Requirement Data				Audit / Information Links			
Select	ID	Name	Drop / Approved Indicator	Tracking	Course History	Statistics	
1 ☐	SR12446	Beale,Natalie		Tracking	Course History	Statistics	
2 ☐	SR12444	Campbell,Morgan	Drop Request	Tracking	Course History	Statistics	
3 ☐	SR12442	Coldrick,Annie		Tracking	Course History	Statistics	
4 ☐	SR12445	Eley,Adam	Drop Request	Tracking	Course History	Statistics	
5 ☐	SR12441	Hyde,Max	Drop Request	Tracking	Course History	Statistics	
6 ☐	SR12449	Keen,Stephanie		Tracking	Course History	Statistics	
7 ☐	SR12443	Powell,Nicholas		Tracking	Course History	Statistics	
8 ☐	SR12448	Quinn,Abigail		Tracking	Course History	Statistics	
9 ☐	SR12447	Slocombe,Lewis		Tracking	Course History	Statistics	

Enrollment Requirement Roster (Summary) page: Audit / Information Links tab

The Select check box and the ID, Name, Drop / Approved Indicator fields are carried over to this tab from the Requirement Data tab.

Tracking

Click this link to access the Tracking of Key Transactions & User Notes page and view post enrollment requirement checking transaction history.

Course History

This link is available if the Provide link to student Course History check box is selected on the Student Records Installation-Enrollment Requirement Roster page.

Click to access the My Course History page as viewed from Student Self Service. Access is based on user security.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Using Self-Service Academic Services."

Statistics

This link is available if the Provide link to Student Statistics check box is selected on the Student Records Installation-Enrollment Requirement Roster page.

Click to access the Academics page as viewed from the Student Services Center or the administrative Term History component as defined on the Student Records Installation - Enrollment Requirement Roster page. Access is based on user security.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Student Services Center Component."

See [Chapter 37, "Viewing Class Enrollment Data," Viewing Student Statistics, page 880.](#)

Run Post Enrollment Requirement Checking

This group box is available if the Allow Post Enrollment Requirement Checking to be run from Enrollment Requirement Roster check box is selected for Page Processing on the Student Records Installation-Enrollment Requirement Processing page.

Set Drop Request Indicator for Students in Non-Compliance

If the Allow Drop Request Indicator to be set for Students in Non-Compliance check box is selected on the setup page, use the options here to specify the circumstances under which a drop request indicator should be set for a student in non-compliance as a result of running post enrollment requirement checking.

The check box settings appear by default from the setup page but you can change them here.

If process results in a status of Conditionally Satisfied and If process results in a status of Not Satisfied

If the check box is selected, and post enrollment requirement checking results in a status of *Conditionally Satisfied* or *Not Satisfied* for a student, the process sets the drop request indicator for the student. If the check box is cleared, no indicator value is set.

Process Drops for Non-Compliance

This group box is available if the Allow Drop Processing to be run from Enrollment Requirement Roster check box is selected for Page Processing on the Student Records Installation-Enrollment Requirement Processing page.

For student listed above, process drops for

Use these options to specify the selection criteria for dropping students for non-compliance of enrollment requirements. The post enrollment requirement checking process must be run before you process drops. The option settings appear by default from the setup page but you can change them here.

selected students

Select this option to drop only the selected students in the student grid.

students where Drop Request Indicator is selected

Select this option to drop only students in the student grid for whom the indicator is set to *Drop Request*.

students with a post enrollment requirement status of

Select this option for drops to be based on the post enrollment requirement status of the student. Select the Conditionally Satisfied check box to drop students in the student grid who have a post enrollment requirement status of *Conditionally Satisfied*. Select the Not Satisfied check box to drop students in the student grid who have a post enrollment requirement status of *Not Satisfied*. You can select one or both check boxes.

Override Action Date to

This check box is available if the Allow Override of Action Date check box is selected on the setup page. Select this check box and enter the action date for the transaction(s). You must have the relevant enrollment security to access this check box.

See Also

[Chapter 3, "Defining Student Records Installation Settings," page 7](#)

[Chapter 7, "Setting Up Enrollment Requisites," page 131](#)

Tracking Post Enrollment Requirement Checking Transaction History

Access the Tracking of Key Transaction & User Notes page (click the Tracking link in the Audit / Information Links tab on the Enrollment Requirement Roster (Summary) page.)

Enrollment Requirement Roster

Tracking of Key Transactions & User Notes

ID: SR12444 Campbell,Morgan

Transaction History

Transaction	Transaction Status	Source / Type	User ID	ID & Name	Last Update DateTime
Last Post Req Check	Not Satisfied	Post Enrl Req Chk Batch	PS	KU0007 Dockett,Darnell James	02/16/11 10:00:08AM
Drop Requested		PERC Batch	PS	KU0007 Dockett,Darnell James	02/16/11 10:00:08AM
Enrollment	Conditional	Mass Enrollment	PS	KU0007 Dockett,Darnell James	02/16/11 8:01:58AM

Notes

*Note Type

DROP

Decision to Drop Student

Notes

Student's record was reviewed and decision was made to drop student for non-compliance.

User ID

PS

Empl ID

KU0007

Name

Dockett,Darnell James

DateTime

Tracking of Key Transaction & User Notes page

Use this page to view the post enrollment requirement checking transaction history for a student, including when a student enrolled, when post enrollment checking was run for the student, when a drop request/approved indicator was set for the student, when an administrative drop was processed and communications generated through 3Cs using the PERC communication category.

You can also add PERC related notes for a student. If the Enable notes to be deleted check box is selected on the Enrollment Requirement Roster setup page, you can delete notes.

See Also

[Chapter 35, "Managing Post Enrollment Requirement Checking," Defining Enrollment Requirement Note Types, page 871](#)

Running Batch Post Enrollment Requirement Checking

This section discusses how to run batch post enrollment requirement checking for multiple classes.

Page Used to Run Batch Post Enrollment Requirement Checking for Multiple Classes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Run Post Enrollment Requirement Checking	SSR_REQS_RC_PER	Curriculum Management, Enrollment Requirements, Post Enroll Req Checking, Run Post Enrollment Req, Run Post Enrollment Requirement Checking	In batch mode, run post enrollment requirement checking for multiple classes.

Running Batch Post Enrollment Requirement Checking for Multiple Classes

Access the Run Post Enrollment Requirement Checking page (Curriculum Management, Enrollment Requirements, Post Enroll Req Checking, Run Post Enrollment Req, Run Post Enrollment Requirement Checking).

Run Post Enrollment Requirement Checking

Run Control ID: PERC1 [Report Manager](#) [Process Monitor](#) [Run](#)

Select students using these conditions:

*Academic Institution: PSUNV PeopleSoft University

*Term: 0640

Select students with the following status:

Enrollment Status:

Select ☒ Enrolled ☒ Waitlisted

Most Recent Requirement Status:

Select students in non-compliance ☒ Not Satisfied ☒ Conditionally Satisfied

Select other students ☐ Enrollment Component ☒ Overridden

☐ Permitted ☒ Satisfied ☐ Unknown

Action

Set Drop Request Indicator for Students in Non-Compliance

☒ If process results in a status of Conditionally Satisfied

☒ If process results in a status of Not Satisfied

Run Post Enrollment Requirement Checking page (1 of 2)

Population Selection

☒ Population Selection

Selection Tool: PS Query [Edit Prompts](#)

Query Name: SSR_REQS_ACAD_ORG [Launch Query Manager](#) [Preview Selection Results](#)

Manual entry by class

☒ Use Class Select [Clear List](#)

Customize Find First 1-2 of 2 Last					
*Class Nbr	Subject	Catalog Nbr	Class Section	Title	
1 3059	SOC	100	1	Introduction to Sociology	
2 1418	SOC	164	2	The Family	

Transaction

[Get / Refresh Last Request](#)

Run Post Enrollment Requirement Checking page (2 of 2)

Select students with the following status

The check box settings appear by default from the Roster and Batch Processing Filter Default Settings group box on the Student Records Installation-Enrollment Requirement Roster page but you can change them here.

Note. Because post enrollment requirement checking cannot be run for dropped students, an enrollment status of Dropped is not available for selection on this page.

Enrollment Status	Select the enrollment statuses for which you are running post enrollment requirement checking.
Most Recent Requirement Status	Select the most requirement statuses for which you are running post enrollment requirement checking. Typically the process is run for students with a status of <i>Not Satisfied</i> and <i>Conditionally Satisfied</i>. For documentation about the status values, refer to the previous documentation about the Enrollment Requirement Roster (Summary) page.

Action

The Action group box is available if the Allow Drop Request Indicator to be set for Students in Non-Compliance check box is selected for batch processing on the Student Records Installation-Enrollment Requirement Processing page. The check box settings appear by default from the setup page but you can change them here. Select one or both check boxes to indicate the statuses for which the batch process should set the Drop Request Indicator for non-compliant students.

Population Selection

Select this check box to run post enrollment requirement checking using population selection. Population selection is a method for selecting the IDs and/or courses to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs and/or courses for a specific transaction, you must use it.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Note. If you select the query using the catalog number, use wild cards to assist you with the query. For example, to search for all SOC 100 level courses, enter %1__ or _1%.

If the Enforce Academic Organization Security check box is selected on the Student Records Installation-Enrollment Requirement Roster page, academic organization security is also enforced for population selection.

Note. You can use population selection and/or class select. By default, the Population Selection and Use Class Select check boxes are cleared.

Query Name	These predefined queries are delivered: - SSR_REQS_ACAD_GRP - SSR_REQS_ACAD_ORG - SSR_REQS_CAMPUS - SSR_REQS_CAREER - SSR_REQS_SESSION - SSR_REQS_SUBJECT - SSR_REQS_SUBJECT_CATNBR - SSR_REQS_TERM

Manual entry by class

Use Class Select	Select this check box to run post enrollment requirement checking using class select.
Class Nbr class number	Enter the class number for each class that is to be included in post enrollment requirement checking. Note. To search for the catalog number using the look up prompt, use wild cards to assist you. For example, to search for Biology 100, enter %100% or _100. If the Enforce Academic Organization Security check box is selected on the Student Records Installation-Enrollment Requirement Roster page, academic organization security is also enforced for manual entry by class.

Transaction

After the process has completed, select the Get/Refresh Last Request button to access information about the process that was just run. Information includes the Enrollment Request ID (from Block Enrollment), the Request Status, the time that the process ran, the total number of transactions, the number of transactions in error, and the number of transactions with messages. You can click on the Enrollment Request ID to go directly to the Block Enrollment component for this group of transactions. This is of more importance when you run the drop process. The post enrollment requirement checking process just updates or assigns the students post enrollment requirement status.

Here is an example:

Transaction

Get/Refresh Last Request

Enrollment Request ID0000002692

Request StatusSuccess/Messages

Last Update DateTime02/18/2011 9:01:15AM

Number of Transactions8

Transactions in Error0

Transactions with Message8

Transaction group box example

Printing Batch Enrollment Requirement Rosters

This section discusses how to print enrollment requirement rosters in batch.

Page Used to Print Enrollment Requirement Rosters in Batch

Page Name	Definition Name	Navigation	Usage
Print Enrollment Requirement Rosters	SSR_REQS_RC_RPT	Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Print Enrollment Req Roster, Print Enrollment Requirement Rosters	In batch mode, print enrollment requirement rosters for multiple classes.

Printing Enrollment Requirement Rosters in Batch

Access the Print Enrollment Requirement Rosters page (Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Print Enrollment Req Roster, Print Enrollment Requirement Rosters).

Print Enrollment Requirement Rosters

Run Control ID: PERC1 [Report Manager](#) [Process Monitor](#) Run

Select students using these conditions:

*Academic Institution: PeopleSoft University

*Term:

Select Display Option: ☒ Summary View ☐ Detail View ☐ Combined View

*Sort Option:

Select students with the following status:

Enrollment Status:

Select ☒ Enrolled ☒ Waitlisted ☐ Dropped

Most Recent Requirement Status:

Select students in non-compliance ☒ Not Satisfied ☒ Conditionally Satisfied

Select other students ☐ Enrollment Component ☐ Overridden

☐ Permitted ☐ Satisfied ☐ Unknown

Population Selection

☒ Population Selection

Selection Tool: [Edit Prompts](#)

Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

Manual entry by class

☒ Use Class Select Clear List

Customize Find						First	1-2 of 2	Last
*Class Nbr	Subject	Catalog Nbr	Class Section	Title				
1 3059	SOC	100	1	Introduction to Sociology				
2 1418	SOC	164	2	The Family				

Print Enrollment Requirement Rosters page

Select Display Option

Select Summary View to display the enrollment and post requirement status of the students in the class. Select Detail View to display detailed information about how a student has or has not met the enrollment requirements for the class. Select Combined View, to display first the summary view, followed by the detail view for each class.

Sort Option

Select the sort option to be used to display students *within* each class.

Note. The sort is always *within a* class, not across classes.

- 1- *Name*: Sort students in a class by name order.
- 2 - *Enrollment Status, Name*: Sort students in a class by their enrollment status and then in name order within enrollment status.
- 3 - *Enrollment Status, Status Group, Name*: Sort students in a class by their enrollment status, then by their status group (non-compliant versus other students) within the enrollment status, and then by student name within the status group.

Note. Status Group is non-compliant students versus other students.

- 4 - *Enrollment Status, Status Group, Requirement Status, Name*: Sort students in a class by their enrollment status, then by their status group (non-compliant versus other students) within the enrollment status, then by requirement status within each status group, and lastly by student name within each requirement status.
- 5 - *Status Group, Requirement Status, Name*: Sort students in a class by their status group (non-compliant versus other students), then by their requirement status within their status group, and then by student name within each requirement status.

For documentation about the Select students with the following status, Population Selection, and Manual Entry by Class group boxes, refer to similar documentation in an earlier section: *Running Batch Post Enrollment Requirement Checking for Multiple Classes*.

Processing Batch Drop Requests for Post Enrollment Requirements

This section discusses how to drop students in batch for non-compliance of enrollment requirements.

Page Used to Drop Non-Compliant Students in Batch

Page Name	Definition Name	Navigation	Usage
Process Drop Requests for Post Enrollment Requirements	SSR_REQS_RC_DRP	Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Process Drop Requests, Process Drop Requests for Post Enrollment Requirement	In batch mode, process drops for students in non-compliance of enrollment requirements.

Dropping Non-Compliant Students in Batch

Access the Process Drop Requests for Post Enrollment Requirements page (Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Process Drop Requests, Process Drop Requests for Post Enrollment Requirement).

Process Drop Requests for Post Enrollment Requirements

Run Control ID: PERC1 [Report Manager](#) [Process Monitor](#) [Run](#)

Select students using these conditions:

*Academic Institution: PeopleSoft University

*Term:

Non-Compliance Selection

Enrollment Status:
 Select ☒ Enrolled ☒ Waitlisted

Drops will only be processed for classes where Drop Review is set to Complete

Process Drops for:
☒ students where Drop Request Indicator is selected
☐ students with a post enrollment requirement status of: ☐ Conditionally Satisfied ☐ Not Satisfied

Action

☐ Override Action Date to:

Population Selection

☒ Population Selection

Selection Tool: [Edit Prompts](#)

Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

Manual entry by class

☒ Use Class Select [Clear List](#)

*Class Nbr	Subject	Catalog Nbr	Class Section	Title		
1 3059	SOC	100	1	Introduction to Sociology		

Customize | Find | | | First 1 of 1 Last

Transaction

[Get / Refresh Last Request](#)

Process Drop Requests for Post Enrollment Requirements page

Non-Compliance Selection

The check box settings appear by default from the Student Records Installation setup pages but you can change the settings here.

Note. Because there is no need to process drops for students who have already dropped the class, the *Dropped* enrollment status is not available here.

Enrollment Status	Select only the enrollment statuses that you want included in the processing for non-compliance of enrollment requirements.
Drops will only be processed for classes where Drop Review is set to Complete	If the Enrollment Requirement Rosters must be reviewed prior to batch processing of drops check box is selected on the Student Records Installation-Enrollment Requirement Roster page, this message appears.
Process Drops for	Select the option for which you want to process drops: either students for whom the Drop Request Indicator is selected or students with a non-compliant post enrollment requirement status. If you select the status option, the Conditionally Satisfied and Not Satisfied check boxes become available and you can select one or both.

For documentation about the Action, Population Selection, and Manual Entry by Class group boxes, refer to similar documentation in the earlier section: *Running Batch Post Enrollment Requirement Checking for Multiple Classes*.

Running the Batch Drop Process

From the Process Scheduler Request page, you can select one of two options:

- **Generate and Process Drops (SRRQDROP):** Full processing in which the drop transactions are generated and then the drops are processed.
- **Generate Drop Transactions (SSR_REQS_DRP):** The drop transactions are generated but the drops are not processed—use this option if you want to review the transactions in the Block Enroll component before processing drops.

Transaction

After the process has completed, select the Get/Refresh Last Request button to access information about the process that was just run. Information includes the Enrollment Request ID (from Block Enrollment), the Request Status, the time that the process ran, the total number of transactions, the number of transactions in error, and the number of transactions with messages.

Click on the Enrollment Request ID to go directly to the Block Enrollment component for this group of transactions. You are taken to the Block Enroll Detail page. View the Status column for any transactions in error. Or, to view only errors, click on the Block Enroll Merge tab and under Filtering Criteria, set Detail Status to *Errors*, and click the Retrieve button. You are taken back to the Block Enroll Detail page—however only those transactions with errors appear. Click on the detail link for further information and decide if you want to resolve any transaction issues.

You can view an example of the Transaction group box in the earlier section: *Running Batch Post Enrollment Requirement Checking for Multiple Classes*.

Defining Enrollment Requirement Note Types

This section discusses how to define enrollment requirement note types.

Page Used to Define Enrollment Requirement Note Types

Page Name	Definition Name	Navigation	Usage
Define Enrollment Requirement Note Type	SSR_REQS_COMTYP	Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Define Enrollment Req Note, Define Enrollment Requirement Note Type	Define note types to be used on the Enrollment Requirement Roster-Tracking of Key Transactions & User Notes page.

Defining Enrollment Requirement Note Types

Access the Define Enrollment Requirement Note Type page (Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Define Enrollment Req Note, Define Enrollment Requirement Note Type).

Define Enrollment Requirement Note Type

Note Type

DROP

Find | View All

First 1 of 1 Last

Effective Date

01/01/1900

Status

Active

Description

Decision to Drop Student

Long Description

Define Enrollment Requirement Note Type page

Purging Post Enrollment Requirement Data

This section discusses how to purge post enrollment requirement data.

Page Used to Purge Post Enrollment Requirement Data

Page Name	Definition Name	Navigation	Usage
Purge Post Enrollment Requirement Data	SSR_REQS_RC_PRG	Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Purge Post Enroll Req Data, Purge Post Enrollment Requirement Data	Use population selection or manual entry by class to purge post enrollment requirement data that is no longer necessary to store within the system.

Purging Post Enrollment Requirement Data

Access the Purge Post Enrollment Requirement Data page (Curriculum Management, Enrollment Requirements, Post Enrollment Req Checking, Purge Post Enroll Req Data, Purge Post Enrollment Requirement Data).

Purge Post Enrollment Requirement Data

Run Control ID: PERC1 [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria

*Academic Institution: PeopleSoft University

*Term:

Population Selection

☒ Population Selection

Selection Tool:

Query Name:

[Edit Prompts](#) [Launch Query Manager](#) [Preview Selection Results](#)

Manual entry by class

☒ Use Class Select [Clear List](#)

*Class Nbr	Subject	Catalog Nbr	Class Section	Title
1 3028	BUSADM	620	1	Corp Strategy II

Customize | Find | First 1 of 1 Last

Purge Post Enrollment Requirement Data page

Note. Purging should be done with caution. If you purge post enrollment requirement data for previous terms, the affected records will be deleted from the following tables:

- SSR_REQS_HEADR: holds the enrollment requirement status and post enrollment requirement status.

- SSR_REQS_RSLTS: holds the requirement status of the requirement group line and requirement line level.
- SSR_REQS_CRSEU: holds the course work that was used to identify the status of the requirement group line or requirement line.
- SSR_REQS_COMM: holds the notes data.
- SSR_REQS_ACTN: holds the drop request or approval action.
- SSR_REQS_CLASS: holds the drop review flag.

For documentation about the fields on this page, refer to the documentation about similar fields in the earlier section: *Running Batch Post Enrollment Requirement Checking for Multiple Classes*.

Chapter 36

Using Enrollment Web Services

This chapter provides a brief overview of Enrollment Web Services (EWS) and explains where you can find detailed information about EWS.

Understanding Enrollment Web Services

Enrollment Web Services support self-service enrollment regardless of the user interface through which students interact with an institution. Any user interface that is web-service enabled and SOAP compliant can access EWS.

For detailed information about EWS:

See Enrollment Web Services Developers Guide and Enrollment Web Services Users Guide on My Oracle Support (Doc ID 1371391.1)

The ID for the My Oracle Support Campus Solutions 9.0 Documentation Home Page is 751540.1.

Chapter 37

Viewing Class Enrollment Data

This chapter discusses how to:

- View enrollment request history.
- View student statistics.
- View student class and exam schedules using self-service pages.
- View class rosters.
- View class rosters using self-service pages.
- Print class rosters.
- Produce student study lists.

Viewing Enrollment Request History

This section discusses how to search for and view enrollment requests.

Page Used to View Enrollment Request History

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Request Search	ENRL_REQ1_INQUIRY	Records and Enrollment, Enroll Students, Enrollment Request Search, Enrollment Request Search	Search for and view enrollment request history.

Searching for and Viewing Enrollment Requests

Access the Enrollment Request Search page (Records and Enrollment, Enroll Students, Enrollment Request Search, Enrollment Request Search).

Enrollment Request Search

Academic Institution: PeopleSoft University

Academic Career: Undergraduate

Term: 0450

Enrollment Request ID:

Enrollment Request Source:

Enrollment Request Action:

Enrollment Action Reason:

User ID:

ID:

Class Nbr:

Search

Refresh Previous Search Result: ☒

Enrollment Action Range

From Date:

End Date:

Last Update Range

From DateTime:

Thru DateTime:

▼ Enrollment List

Customize | Find | First 1-255 of 255 Last

Fields 1-7

Fields 8-11

Fields 12-19

Fields 20-25

Fields 26-30

Fields 31-35

Fields 36-40

Fields 41-44

	User ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career
1	PSDF	SR0400	0450	1088	MUSIC	235	UGRD
2	PSDF	SR0400	0450	1114	ENGLIT	150	UGRD
3	PS	SR0404	0450	1053	PSYCH	124	UGRD

Enrollment Request Search page

The enrollment engine keeps a history of all enrollment requests that it processes successfully. The system queries against these transactions, as well as any enrollment transactions posted through the Grade Roster component, and displays all of the enrollment request transactions that meet your search criteria in a grid at the bottom of this page. You must enter at least two search criteria. For example, you can search to find out how a student was dropped from a class, or you can view a list of students enrolled in a class that has been cancelled.

Warning! Access to this inquiry component should be restricted to key individuals in the institution because sensitive student information, such as course grades, is visible in this component.

Academic Career

Enter the academic career for which you want to search for enrollment transaction history.

Term

Enter the term for which you want to search for enrollment transaction history.

Enrollment Request ID

Enter the enrollment request ID for which you want to search for the enrollment transaction history.

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Enrollment Request Source	Enter the enrollment request source for which you want to search for the enrollment transaction history. The enrollment request source is the process that generated the enrollment request. The Self Service Grade Posting (SG) code distinguishes instructor enrollment requests (such as grade changes) from student self-service (such as adds and drops). The system uses this code to exclude instructor self-service grade change requests from the search views for the Enrollment Request and Quick Enroll components. These types of requests cannot be viewed from these two components because they are intended to create and view enrollment requests that contain a single ID only. You can view instructor self-service grade change requests in the Enrollment Request Search or Block Enroll components.
Enrollment Request Action	Enter the enrollment request action for which you want to search for the enrollment transaction history.
Enrollment Action Reason	Enter the enrollment action reason for which you want to search for the enrollment transaction history.
User ID	Enter the user ID of the person who processed the enrollment transactions that you want to view.
ID	Enter the ID of the student whose enrollment transactions you want to view. The system prompts you with IDs from the personal data table (PERSONAL_DATA).
Class Nbr (class number)	Enter the class for which you want to view the enrollment transactions within a term. To use this field, you must also specify a term in the Term field so that the system knows which term's schedule of classes is valid.
From Date and End Date	Specify the date range for the enrollment action. For example, search for all enrollment requests for which students were dropped from a class through the Mass Enrollment component due to a canceled class during the fall quarter.
From Date Time and Thru Date Time (through date time)	Enter a time range during which the enrollment requests were last updated.
Search	Click to query the enrollment tables and retrieve enrollment transaction history based on your search criteria. The system displays your search results in the Enrollment List grid at the bottom of the page.
Refresh Previous Search Result	If you select this check box, the system populates the Enrollment List grid at the bottom of this page with only the latest search results and clears previous data from the list.

Enrollment List

The system populates the grid in the lower portion of the page with each enrollment request transaction that matches your search criteria. Each row contains 46 fields of pertinent information about the enrollment request, dispersed over eight tabs. Click the tabs to view additional fields.

Viewing Student Statistics

Student Records enables you to view summary information at various points during a student's academic career, with numerous ways to access the information. You can view summaries of both enrollment and term statistics.

This section discusses how to:

- View student enrollment summaries.
- View term statistics.
- Calculate term statistic values.
- View cumulative statistics for multiple terms.
- Calculate cumulative statistic values.
- View student terms.

Pages Used to View Student Statistics

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Summary	STDNT_ENRL_INQ	Records and Enrollment, Enrollment Summaries, Enrollment Summary, Enrollment Summary	View a summary of enrollment information. The student must first enroll in classes.
Enrollment Summary - Term Statistics	TERM_STATISTICS2	Records and Enrollment, Enrollment Summaries, Enrollment Summary, Term Statistics	View term statistics for a specific term. The student must first enroll in classes, have posted transfer credits, or both.
Term History - Term Statistics	TERM_STATISTICS	Records and Enrollment, Student Term Information, Term History, Term Statistics	View term statistics for all terms within an academic career. The student must first enroll in classes, have posted transfer credits, or both.

Page Name	Definition Name	Navigation	Usage
Cumulative Statistics	CUM_STATISTICS	Records and Enrollment, Student Term Information, Term History, Cumulative Statistics	View cumulative statistics for all terms within an academic career. The student must first enroll in classes, have posted transfer credits, or both.
Student Term Search	STDNT_TERM_SRCH	Records and Enrollment, Career and Program Information, Student Term Search, Student Term Search	View all terms in which a student has been active.

Viewing Student Enrollment Summaries

Access the Enrollment Summary page (Records and Enrollment, Enrollment Summaries, Enrollment Summary, Enrollment Summary).

Enrollment Summary				Term Statistics						
Nolan,Edward				SR0431		★				
Term:	2008 Spr	Career:	Undergrad	PeopleSoft University		Print Study List		Report Manager		
Find View All First 1-3 of 5 Last										
	Class Nbr	Subject	Catalog	Session	Section	Status	Status/Reason	Acad Prog	Grading Basis	Units Taken
🔍	1046	HONORS	290	Regular	1	Enrolled	Enrolled	LAU	Graded	4.00
		Sophomore Seminar in Honors		Lecture						
🔍	1080	PSYCH	280	Regular	1	Enrolled	Enrolled	LAU	Graded	3.00
		Cog Psy		Lecture						
🔍	1090	PSYCH	340	Regular	1	Enrolled	Enrolled	LAU	Graded	3.00
		Prob Solv		Lecture						

Enrollment Summary page

View all classes in which a student is successfully enrolled for the term.



Click the Course Detail button to access the Class Detail page, where you can view details about the class listed on the Enrollment Summary page.

Print Study List

Click to print the student's enrollment summary.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through Self Service, page 808](#)

Viewing Term Statistics

Access the Term History - Term Statistics page (Records and Enrollment, Student Term Information, Term History, Term Statistics).

Term Statistics		Cumulative Statistics		Term Withdrawal		Session Withdrawal		Academic Standing		D	
Edward Nolan						SR0431		★			
Find View All First ◀ 1 of 1 ▶ Last											
Academic Career:		Undergraduate									
Find View All First ◀ 1 of 19 ▶ Last											
Institution:		PeopleSoft University				Academic Level - Term Start:		Sophomore			
Term:		0600 2008 Spring									
Enrollments											
	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load		14.000			
						Units Earned Towards Acad Load		7.000			
For GPA	7.000	16.000	2.286	4.000	4.000	Units Taken For Audit		3.000			
Not For GPA	3.000			3.000	0.000						

Term History - Term Statistics page (1 of 2)

Transfer Credit							
	Graded Units	Grade Points	GPA	Earned Units		Graded Transfer Units GPA / No GPA	3.000
						For Units Only	3.000
For GPA	3.000	9.000	3.000	3.000		Units Adjustment	0.000
Not For GPA	0.000			0.000		>>> Total Adjusted Transferred Units	6.000
Combined (Enrollment + Transfer Credit Units)							
	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Combined Earned Units GPA / No GPA	10.000
						Transfer Credit For Units Only	3.000
For GPA	10.000	25.000	2.500	7.000	4.000	Transfer Credit Units Adjustment	0.000
Not For GPA	3.000			3.000	0.000	>>> Total Term Units	13.000

Term History - Term Statistics page (2 of 2)

View enrollment and transfer credit statistics for all terms in which the student has been or is enrolled. You can view this information for an individual term in the Enrollment Summary component.

Summary of Student Enrollment for the Term

The following information refers to the example screen shot:

- 4 Units with Grade A (for GPA) – 16 grade points
- 3 Units with Grade F (for GPA) – 0 grade points

- 3 Units with Grade Pass (Not For GPA)
- 4 Units with no grade (in progress) (class will be For GPA after grading)
- 3 Units with an Audit grade basis

Enrollments

Graded Units - For GPA
(graded units - for grade point average) Displays the total number of units that are taken for a grade (A, B, C, D, F) and accumulate in the GPA.

Graded Units - Not For GPA
(graded units - not for grade point average) Displays the total number of units that are taken for a grade (Pass, Fail, Satisfactory, Unsatisfactory) and do not accumulate in the GPA.

Note. The Graded Units - For GPA and Graded Units - Not for GPA fields do not include classes that are in a withdrawn status and classes that are taken with the audit grade basis.

Grade Points - For GPA
(grade points - for grade point average) Displays a number that is calculated by taking the grade points received for each grade (on a 4-point grading scale, an A equals 4 points), and multiplying that number by the number of units taken for each class for which a grade accumulates in the GPA.

GPA - For GPA (grade point average - for grade point average) Displays the grade point average which is calculated by dividing the grade points for GPA by the graded units for GPA.
Use the GPA Rounding/Truncating Option field on the Student Records Installation page (Set Up SACR, Install, Student Records Installation) to indicate to how many decimal places you want to round or truncate the grade point average.

Note. No values appear in the Not For GPA row for the Grade Points and GPA fields.

Earned Units - For GPA
(earned units - for grade point average) Displays the total number of units that are passed with an earned credit grade (A, B, C, D) and accumulate in the GPA.

Earned Units - Not For GPA
(earned units - not for grade point average) Displays the total number of units that are passed with an earned credit grade (Pass, Satisfactory) and do not accumulate in the GPA.

In Progress Units - For GPA
(in progress units - for grade point average) Displays the total number of units that are not yet completed and for which the future assigned grade will accumulate in the GPA.

In Progress Units - Not For GPA (in progress units - not for grade point average) Displays the total number of units that are not yet completed and for which the future assigned grade will not accumulate in the GPA.

Units Taken Towards Acad Load (units taken towards academic load) Displays the total number of units taken for progress. This total is used in Student Records to determine academic load.

Units Earned Towards Acad Load (units earned towards academic load)	Displays the total number of units passed for progress. This total is used in Student Records to determine academic load and academic level.
	Note. For Units Taken Towards Acad Load and Units Earned Towards Acad Load, the units are summed regardless of academic load determiner set on Level/Load Rules.

Units Taken For Audit	Displays the total number of audit units taken for the term.

Summary of Student Transfer Credit for Term

The following information refers to the example screen shot:

- 3 Units with Grade B (for GPA) for a model where the Include in GPA check box is selected on the Transfer Course Entry page.
- 3 Units with Grade T for a model where the Include in GPA check box is cleared on the Transfer Course Entry page.

Transfer Credit

The statistics in this group box include both internal and external transfer credits.

Graded Units - For GPA (graded units - for grade point average)	Displays the total number of units that are transferred for a grade (A, B, C, D, F) and accumulate in the GPA for models where the Include in GPA check box is selected on the Transfer Course Entry page.
Graded Units - Not For GPA (graded units - not for grade point average)	Displays the total number of units that are transferred for a grade (T) and do not accumulate in the GPA for models where the Include in GPA check box is selected on the Transfer Course Entry page.
Grade Points - For GPA (grade points - for grade point average)	Displays a number that is calculated by taking the grade points received for each grade (on a 4-point grading scale, an A equals 4 points), and multiplying that number by the number of units taken for each transferred class for which a grade accumulates in the GPA.
GPA - For GPA (grade point average - for grade point average)	Displays the grade point average which is calculated by dividing the grade points for GPA by the graded units for GPA. Use the GPA Rounding/Truncating Option field on the Student Records Installation page (Set Up SACR, Install, Student Records Installation) to indicate to how many decimal places you want to round or truncate the grade point average.
	Note. No values appear in the Not For GPA row for the Grade Points and GPA fields.
Earned Units - For GPA (earned units - for grade point average)	Displays the total number of transferred units that are passed with an earned credit grade (A, B, C, D) and accumulate in the GPA for models where the Include in GPA check box is selected on the Transfer Course Entry page.

Earned Units - Not For GPA (earned units - not for grade point average)	Displays the total number of transferred units that are passed with an earned credit grade (T) and do not accumulate in the GPA for models where the Include in GPA check box is selected on the Transfer Course Entry page.
Graded Transferred Units GPA / No GPA (graded transferred units for grade point average / not for grade point average)	Displays the sum of transferred units for which received grades both accumulate and do not accumulate in the GPA for models where the Include in GPA check box is selected on the Transfer Course Entry page.
For Units Only	Displays the total number of transferred units that are passed with an earned credit grade and do not accumulate in the GPA for models where the Include in GPA check box is cleared on the Transfer Course Entry page.
Units Adjustment	Displays the total number of units that were manually removed from the student's overall transfer credit units. This field is updated on the Terms in Residence page in the Term Activation component. Note. This number displays as a positive value, but is stored as a negative value.
Total Adjusted Transferred Units	Displays the sum of graded transfer units (for GPA and not for GPA), plus the value in the Units Only field, minus the value in the Units Adjustment field.

Combined (Enrollment + Transfer Credit Units)

Graded Units - For GPA (graded units - for grade point average)	Displays the sum of all enrollment and transfer credit units that are taken and transferred for a grade (A, B, C, D, F) and accumulate in the GPA.
Graded Units - Not For GPA (graded units - not for grade point average)	Displays the sum of all enrollment and transfer credit units that are taken and transferred for a grade (Pass, Fail, Satisfactory, Unsatisfactory, T) and do not accumulate in the GPA.
Grade Points - For GPA (grade points - for grade point average)	Displays the sum of all grade points for enrollment and transfer credit units that accumulate in the GPA.
GPA - For GPA (grade point average - for grade point average)	Displays the grade point average which is calculated by dividing the grade points for GPA by the graded units for GPA. Use the GPA Rounding/Truncating Option field on the Student Records Installation page (Set Up SACR, Install, Student Records Installation) to indicate to how many decimal places you want to round or to truncate the grade point average. Note. No values appear in the Not For GPA row for the Grade Points and GPA fields.

Earned Units - For GPA (earned units - for grade point average)	Displays the sum of all enrollment and transfer credit units that are passed with an earned credit grade (A, B, C, D) and accumulate in the GPA.
Earned Units - Not For GPA (earned units - not for grade point average)	Displays the sum of all enrollment and transfer credit units that are passed with an earned credit grade (Pass, Satisfactory, T) and do not accumulate in the GPA.
In Progress Units - For GPA (in progress units - not for grade point average)	Displays the total number of units that are not yet completed and for which the future assigned grade will accumulate in the GPA.
In Progress Units - Not For GPA (in progress units - not for grade point average)	Displays the total number of units that are not yet completed and for which the future assigned grade will not accumulate in the GPA.
Combined Earned Unit GPA/ No GPA (combined earned unit for grade point average / not for grade point average)	Displays the sum of all enrollment and transfer credit units that are passed with an earned credit grade, including both those that accumulate and do not accumulate in the GPA.
Transfer Credit For Units Only	Displays the sum of transferred units that are passed with an earned credit grade and do not accumulate in the GPA for models where the Include in GPA check box is cleared on the Transfer Course Entry page.
Transfer Credit Units Adjustment	Displays the number of units that were manually removed from the student's overall transfer credit units.
Total Term Units	Displays the sum of all enrollment and transfer credit units that are passed with an earned credit grade, including both those that accumulate and do not accumulate in the GPA, plus transfer credit units that are passed with an earned credit grade that do not accumulate in the GPA for models where the Include in GPA check box is cleared, minus the number of units that were manually removed from the student's overall transfer credit units. Units taken for audit are excluded from this total.

Calculating Term Statistic Values

Use the following table to understand how term statistic values are calculated.

Term Statistics Page Field	Field from STDNT_CAR_TERM	Calculation
ENROLLMENT		
Graded Units - For GPA	UNT_TAKEN_GPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a

Graded Units - Not For GPA	UNT_TAKEN_NOGPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a
Grade Points - For GPA	GRADE_POINTS	Sum of GRADE_POINTS from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a
GPA - For GPA	CUR_GPA	GRADE_POINTS / UNT_TAKEN_GPA
Earned Units - For GPA	UNT_PASSED_GPA	Sum of UNT_EARNED from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y
Earned Units - Not For GPA	UNT_PASSED_NOGPA	Sum of UNT_EARNED from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y
In-Progress Units - For GPA	UNT_INPROG_GPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = I, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a
In-Progress Units - Not For GPA	UNT_INPROG_NOGPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = I, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a

Units Taken Towards Acad Load	UNT_TAKEN_PRGRSS	UNT_TAKEN_GPA + UNT_TAKEN_NOGPA + UNT_INPROG_GPA + UNT_INPROG_NOGPA Sum of UNT_PRGRSS from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = I or Y, INCLUDE_IN_GPA = n/a, EARN_CREDIT = n/a
Units Earned Towards Acad Load	UNT_PASSD_PRGRSS	UNT_PASSD_GPA+ UNT_PASSD_NOGPA Sum of UNT_PRGRSS from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y
Units Taken For Audit	UNT_AUDIT	Sum of UNT_PRGRSS from STDNT_ENRL where AUDIT_GRADE_BASIS = Y, UNITS_ATTEMPTED = n/a, INCLUDE_IN_GPA = n/a, EARN_CREDIT = n/a
TRANSFER CREDIT		

Graded Units - For GPA	TRF_TAKEN_GPA	Course Credits: 1. Internal Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = I) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a 2. External Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = E) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where ORG_INST_TBL.TRNSFR_CR_INCLUDE_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a 3. Manual Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = M) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where TRNS_CRSE_SCH.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a Test Credits: Sum of UNIT_TRNSFR from TRNS_TEST_DTL where TRNS_TEST_MODEL.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a Other Credits: Sum of UNIT_TRNSFR from TRNS_OTHR_DTL where TRNS_OTHR_MODEL.INCLUDE_I

		N_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a

Graded Units - Not For GPA	TRF_TAKEN_NOGPA	Course Credits: 1. Internal Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = I) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a 2. External Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = E) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where ORG_INST_TBL.TRNSFR_CR_INCLUDE_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a 3. Manual Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = M) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where TRNS_CRSE_SCH.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a Test Credits: Sum of UNIT_TRNSFR from TRNS_TEST_DTL where TRNS_TEST_MODEL.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a Other Credits: Sum of UNIT_TRNSFR from TRNS_OTHR_DTL where TRNS_OTHR_MODEL.INCLUDE_IN_GPA = Y,

		UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a

Grade Points - For GPA	TRF_GRADE_POINTS	Course Credits: 1. Internal Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = I) Sum of (UNIT_TRNSFR * GRD_PTS_PER_UNIT) from TRNS_CRSE_DTL where UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a 2. External Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = E) Sum of (UNIT_TRNSFR * GRD_PTS_PER_UNIT) from TRNS_CRSE_DTL where ORG_INST_TBL.TRNSFR_CR_INCL_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a 3. Manual Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = M) Sum of (UNIT_TRNSFR * GRD_PTS_PER_UNIT) from TRNS_CRSE_DTL where TRNS_CRSE_SCH.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a Test Credits: Sum of (UNIT_TRNSFR * GRD_PTS_PER_UNIT) from TRNS_TEST_DTL where TRNS_TEST_MODEL.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a Other Credits:

		Sum of (UNIT_TRNSFR * GRD_PTS_PER_UNIT) from TRNS_OTHR_DTL where TRNS_OTHR_MODEL.INCLUDE_I N_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a
GPA - For GPA	SSR_TRF_CUR_GPA	TRF_GRADE_POINTS / TRF_TAKEN_GPA

Earned Units - For GPA	TRF_PASSED_GPA	Course Credit 1. Internal Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = I) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y 2. External Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = E) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where ORG_INST_TBL.TRNSFR_CR_INCLUDE_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y 3. Manual Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = M) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where TRNS_CRSE_SCH.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y Test Credits: Sum of UNIT_TRNSFR from TRNS_TEST_DTL where TRNS_TEST_MODEL.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y Other Credits: Sum of UNIT_TRNSFR from TRNS_OTHR_DTL where TRNS_OTHR_MODEL.INCLUDE_I

		N_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = Y, EARN_CREDIT = Y

Earned Units - Not For GPA	TRF_PASSED_NOGPA	Course Credits: 1. Internal Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = I) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y 2. External Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = E) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where ORG_INST_TBL.TRNSFR_CR_INCLUDE_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y 3. Manual Transfer (TRNS_CRSE_SCH.TRNSFR_SRC_TYPE = M) Sum of UNIT_TRNSFR from TRNS_CRSE_DTL where TRNS_CRSE_SCH.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y Test Credits: Sum of UNIT_TRNSFR from TRNS_TEST_DTL where TRNS_TEST_MODEL.INCLUDE_IN_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y Other Credits: Sum of UNIT_TRNSFR from TRNS_OTHR_DTL where TRNS_OTHR_MODEL.INCLUDE_I

		N_GPA = Y, UNITS_ATTEMPTED = Y, INCLUDE_IN_GPA = N, EARN_CREDIT = Y
Graded Transferred Units GPA / No GPA	DERIVED	TRF_TAKEN_GPA+ TRF_TAKEN_NOGPA
For Units Only	DERIVED	UNT_TRNSFR + UNT_TEST_CREDIT + UNT_OTHER
Units Adjustment	TC_UNITS_ADJUST	As entered on Terms of Residence page
Total Adjusted Transferred Units	DERIVED	(TRF_TAKEN_GPA+ TRF_TAKEN_NOGPA) + (UNT_TRNSFR + UNT_TEST_CREDIT + UNT_OTHER) - TC_UNITS_ADJUST
COMBINED UNITS		
Graded Units - For GPA	DERIVED	UNT_TAKEN_GPA + TRF_TAKEN_GPA
Graded Units - Not For GPA	DERIVED	UNT_TAKEN_NOGPA+ TRF_TAKEN_NOGPA
Grade Points - For GPA	DERIVED	GRADE_POINTS + TRF_GRADE_POINTS
GPA - For GPA	SSR_COMB_CUR_GPA	(GRADE_POINTS + TRF_GRADE_POINTS) / (UNT_TAKEN_GPA + TRF_TAKEN_GPA)
Earned Units - For GPA	DERIVED	UNT_PASSD_GPA + TRF_PASSED_GPA
Earned Units - Not for GPA	DERIVED	UNT_PASSD_NOGPA+ TRF_PASSED_NOGPA
In Progress Units - For GPA	UNT_INPROG_GPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = I, INCLUDE_IN_GPA = Y, EARN_CREDIT = n/a

In Progress Units - Not For GPA	UNT_INPROG_NOGPA	Sum of UNT_TAKEN from STDNT_ENRL where AUDIT_GRADE_BASIS = N, UNITS_ATTEMPTED = I, INCLUDE_IN_GPA = N, EARN_CREDIT = n/a
Combined Earned Unit GPA/ No GPA	DERIVED	(UNT_PASSED_GPA + TRF_PASSED_GPA) + (UNT_PASSED_NOGPA + TRF_PASSED_NOGPA)
Transfer Credit For Units Only	DERIVED	UNT_TRNSFR + UNT_TEST_CREDIT + UNT_OTHER
Transfer Credit Units Adjustment	TC_UNITS_ADJUST	As entered on Terms of Residence page
Total Term Units	UNT_TERM_TOT	((UNT_PASSED_GPA + TRF_PASSED_GPA) + (UNT_PASSED_NOGPA + TRF_PASSED_NOGPA)) + (UNT_TRNSFR + UNT_TEST_CREDIT + UNT_OTHER) - TC_UNITS_ADJUST

Viewing Cumulative Statistics for Multiple Terms

Access the Cumulative Statistics page (Records and Enrollment, Student Term Information, Term History, Cumulative Statistics).

Term Statistics	Cumulative Statistics	Term Withdrawal	Session Withdrawal	Academic Standing	D

Edward Nolan SR0431 ★

Find | View All First 1 of 1 Last

Academic Career: Undergraduate

Find | View All First 1 of 19 Last

Institution: PeopleSoft University **Academic Level - Term End:** Sophomore

Term: 0600 2008 Spring **Reset Cum Stats at Term Start:** ☐

Enrollments

	Grade Units	Grade Points	GPA	Earned Units	In Progress Units		
For GPA	42.000	127.000	3.024	39.000	7.000	Units Taken Towards Acad Load	52.000
Not For GPA	3.000			3.000	0.000	Units Earned Towards Acad Load	42.000
						Units Taken For Audit	3.000

Cumulative Statistics page (1 of 2)

Transfer Credit							
	Graded Units	Grade Points	GPA	Earned Units			
For GPA	3.000	9.000	3.000	3.000		Graded Transfer Units GPA / No GPA	3.000
Not For GPA	0.000			0.000		For Units Only	3.000
						Units Adjustment	0.000
						>>> Total Adjusted Transferred Units	6.000

Combined (Enrollment + Transfer Credit Units)							
	Graded Units	Grade Points	GPA	Earned Units	In Progress Units		
For GPA	45.000	136.000	3.022	42.000	7.000	Combined Earned Units GPA / No GPA	45.000
Not For GPA	3.000			3.000	0.000	Transfer Credit For Units Only	3.000
						Transfer Credit Units Adjustment	0.000
						>>> Total Cumulative Units	48.000

Cumulative Statistics page (2 of 2)

This page displays running cumulative totals by term.

Enrollments**Units Taken for Audit** Displays the total cumulative audit units taken.

Note. All other field definitions are the same as the definitions for the fields in the Enrollments group box on the Term Statistics page.

Note. RESET_CUM_STATS triggers a reset in cumulative computation.

Transfer Credit

All field definitions are the same as the definitions for the fields in the Transfer Credit group box on the Term Statistics page.

Combined (Enrollment + Transfer Credit Units)

Total Cumulative Units Displays the sum of all enrollment and transfer credit units that are passed with an earned credit grade, including both those accumulated and not accumulated in the GPA, plus transfer credit units that are passed with an earned credit grade and do not accumulate in the GPA for models where Include in GPA check box is cleared, minus the number of units that were manually removed from the student's overall transfer credit units. Units taken for audit are excluded from this total.

All other field definitions are the same as the definitions for the fields in the Combined (Enrollment + Transfer Credit Units) group box on the Term Statistics page.

Calculating Cumulative Statistic Values

Use the following table to understand how cumulative statistic values are calculated.

Cumulative Statistics Page Field	Field from STDNT_CAR_TERM	Calculation
ENROLLMENT		
Graded Units - For GPA	SSR_TOT_EN_TKN_GPA	Cumulative sum of UNT_TAKEN_GPA
Graded Units - Not For GPA	DERIVED	Cumulative sum of UNT_TAKEN_NOGPA
Grade Points - For GPA	SSR_TOT_EN_GRDPTS	Cumulative sum of GRADE_POINTS
GPA - For GPA	SSR_CUM_EN_GPA	$SSR\_TOT\_EN\_GRDPTS / SSR\_TOT\_EN\_TKNGPA$
Earned Units - For GPA	DERIVED	Cumulative sum of UNT_PASSD_GPA
Earned Units - Not For GPA	DERIVED	Cumulative sum of UNT_PASSD_NOGPA
In-Progress Units - For GPA	TOT_INPROG_GPA	Cumulative sum of UNT_INPROG_GPA
In-Progress Units - Not For GPA	TOT_INPROG_NOGPA	Cumulative sum of UNT_INPROG_NOGPA

Units Taken Towards Acad Load	DERIVED	Cumulative sum of UNT_TAKEN_PRGRSS
Units Earned Towards Acad Load	DERIVED	Cumulative sum of UNT_PASSED_PRGRSS
Units Taken For Audit	TOT_AUDIT	Cumulative sum of UNT_AUDIT
TRANSFER CREDIT		
Graded Units - For GPA	SSR_TOT_TR_TKNGPA	Cumulative sum of TRF_TAKEN_GPA
Graded Units - Not For GPA	DERIVED	Cumulative sum of TRF_TAKEN_NOGPA
Grade Points - For GPA	SSR_TOT_TR_GRDPTS	Cumulative sum of TRF_GRADE_POINTS
GPA - For GPA	SSR_CUM_TR_GPA	SSR_TOT_TR_GRDPTS / SSR_TOT_TR_TKNGPA
Earned Units - For GPA	DERIVED	Cumulative sum of TRF_PASSED_GPA
Earned Units - Not For GPA	DERIVED	Cumulative sum of TRF_PASSED_NOGPA
Graded Transferred Units GPA / No GPA	DERIVED	SSR_TOT_TR_TKNGPA+ Cumulative sum of TRF_TAKEN_NOGPA
For Units Only	DERIVED	TOT_TRNSFR + TOT_TEST_CREDIT + TOT_OTHER
Units Adjustment	DERIVED	Cumulative sum of TC_UNITS_ADJUST
Total Adjusted Transferred Units	DERIVED	SSR_TOT_TR_TKNGPA+ Cumulative sum of TRF_TAKEN_NOGPA) + (TOT_TRNSFR + TOT_TEST_CREDIT + TOT_OTHER) – Cumulative sum of TC_UNITS_ADJUST
COMBINED UNITS		
Graded Units - For GPA	TOT_TAKEN_GPA	SSR_TOT_EN_TKN_GPA + SSR_TOT_TR_TKNGPA

Graded Units - Not For GPA	TOT_TAKEN_NOGPA	Cumulative sum of UNT_TAKEN_NOGPA + Cumulative sum of TRF_TAKEN_NOGPA
Grade Points - For GPA	TOT_GRADE_POINTS	SSR_TOT_EN_GRDPTS + SSR_TOT_TR_GRDPTS
GPA - For GPA	CUM_GPA	(SSR_TOT_EN_GRDPTS + SSR_TOT_TR_GRDPTS) / (SSR_TOT_EN_TKN_GPA + SSR_TOT_TR_TKNGPA)
Earned Units - For GPA	TOT_PASSD_GPA	Cumulative sum of UNT_PASSD_GPA + Cumulative sum of TRF_PASSED_GPA
Earned Units - Not for GPA	TOT_PASSD_NOGPA	Cumulative sum of UNT_PASSD_NOGPA + Cumulative sum of TRF_PASSED_NOGPA
In Progress Units - For GPA	TOT_INPROG_GPA	Cumulative sum of UNT_INPROG_GPA
In Progress Units - Not For GPA	TOT_INPROG_NOGPA	Cumulative sum of UNT_INPROG_NOGPA
Combined Earned Unit GPA/ No GPA	DERIVED	(Cumulative sum of UNT_PASSD_GPA + Cumulative sum of TRF_PASSED_GPA) + (Cumulative sum of UNT_PASSD_NOGPA + Cumulative sum of TRF_PASSED_NOGPA)
Transfer Credit For Units Only	DERIVED	TOT_TRNSFR + TOT_TEST_CREDIT + TOT_OTHER
Transfer Credit Units Adjustment	DERIVED	Cumulative sum of TC_UNITS_ADJUST
Total Cumulative Units	TOT_CUMULATIVE	Sum of TOT_PASSD_GPA + TOT_PASSD_NOGPA + TOT_TRNSFR +TOT_TEST_CREDIT + TOT_OTHER – (Cumulative Sum of TC_UNITS_ADJUST)

Viewing Student Terms

Access the Student Term Search page (Records and Enrollment, Career and Program Information, Student Term Search, Student Term Search).

Academic Career	Every academic career for which the student has been active for a term.
Term	Every term in which the student has been active.
Academic Institution	The academic institution at which the student has been term active.
Eligible To Enroll	The student's eligibility to enroll in the specified academic career and term at an academic institution, according to the value of the corresponding field on the Term Activation page.

Viewing Student Class and Exam Schedules Using Self-Service Pages

If your institution has licensed PeopleSoft Campus Self Service, your students can view their class schedule and scheduled exams over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Enrollment," Viewing a Class Schedule

Viewing Class Rosters

This section discusses how to view class rosters.

Page Used to View Class Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Class Roster	CLASS_ROSTER	Curriculum Management, Class Roster, Class Roster, Class Roster	View the students who are enrolled in a class, have dropped a class, or are on the wait list for a class.

Viewing Class Rosters

Access the Class Roster page (Curriculum Management, Class Roster, Class Roster, Class Roster).

Class Roster

2010 Spring | Regular Academic Session | PeopleSoft University | Undergraduate

▼ ENGLIT 120 - 1 (1176)

Anglo-Saxon English Literature (Lecture)

Days and Times	Room	Instructor	Dates
MoWeFr 11:00AM-11:50AM	TBA	Staff	01/24/2010 - 05/08/2010

*Enrollment Status: ▼

Enrollment Capacity: 999 Enrolled: 531

Enrolled Students							
Customize Find  				First  1-531 of 531  Last			
Select	ID	Abarri,Dana S	Grade Basis	Units	Program and Plan	Level	
1	FAPK0157	Abarri,Dana S	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman	
2	☐	FAD0010	Abney,Safura	Graded	12.00	Liberal Arts Undergraduate - Mathematics (BA)	Freshman
3	FAPK0184	Abrams,Karen A	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman	
4	☐	FAAG0067	Aditya,Bilton	Graded	12.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman
5	FAPK0131	Ambrose,Pete F	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman	
6	FAPK0136	Andrews,Cindy L	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman	
7	FAPK0186	Anthony,George D	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman	
8	☐	FAAG0017	Austin,Gavin G	Graded	12.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman

Class Roster page (1 of 2)

528	☐	FAPK0395	Zepeda,Gerald U	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman
529	☐	FAPK0396	Ziegler,Llyod I	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman
530		FAPK0156	Zoe,Caroline D	Graded	13.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman
531		FAAG0038	Zon,Lawson E	Graded	12.00	Liberal Arts Undergraduate - Undeclared Undergraduate	Freshman

[Select All](#) [Clear All](#)

Class Roster page (2 of 2)

Class Detail	Click to access the class detail information.
Enrollment Status	Enter the student enrollment status that you want to view for the class. The available values are <i>All</i>, <i>Dropped</i>, <i>Enrolled</i>, and <i>Waitlisted</i>. The roster data determines which values are available. For example, if the class has no students with a dropped status, then the <i>Dropped</i> value is not available. If all the students in the class are enrolled, the only available value is <i>Enrolled</i>.
Start Date	This field is only available for classes scheduled in the Open Entry/Exit (OEE) session. When the field is available, the default value is the term start date. Enter a date in this field to filter the list of students in the class roster for an OEE class so that the only remaining students are those whose class start date is on or after a specific date.
Enrollment Capacity	This value is provided by default from the value that is defined on the Schedule of Classes - Enrollment Cntrl page.
Enrolled	The total number of students enrolled in the class.
Dropped	The total number of students who were enrolled in the class but are now in a dropped status.
Waitlisted	The total number of students currently waitlisted for the class.
Select	Use this check box to select particular students for notification. This check box is available only for students who have an email address defined within the system.
Grade Basis	The grading basis of enrolled students.
Units	The number of units that the student took for the class.
Start Date and End Date	The start and end dates for students in an OEE class.
Program and Plan	The student's primary academic program and any associated academic plans for that program.
Status	The student's current enrollment status in the class. This column appears only when the <i>All</i> value is entered in the Enrollment Status field.
Status Note	This column displays the waitlist position number for students who have a waitlisted status. If a student has a status of enrolled, but has been assigned a drop penalty grade, the notation <i>withdrawn</i> appears in the column.

Select All and Clear All

Click the Select All link to select all students for notification. Only students who have an email address defined in the system are available for selection.

To select particular students for notification, use the Select check box.

Click the Clear All link to clear your selections.

Notify Selected Students

Click this button to access the Class Roster - Send Notification page and send email notifications to selected students.

See Also

[Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through Self Service, page 808](#)

Viewing Class Rosters Using Self-Service Pages

If your institution has licensed PeopleSoft Campus Self Service, your staff can view class rosters over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Faculty Center," Viewing Self-Service Class Rosters

Printing Class Rosters

This section discusses how to print class rosters.

Page Used to Print Class Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print Class Roster	RUNCTL_SRCLASSRSTR	Curriculum Management, Class Roster, Print Class Roster, Print Class Roster	Print class rosters.

Printing Class Rosters

Access the Print Class Roster page (Curriculum Management, Class Roster, Print Class Roster, Print Class Roster).

Print Class Roster

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution: PSUNV

PeopleSoft University

*Term: 0570

2006 Fall

Assignment

Find | View All 1 of 1

*Session: Regular

☐ Display Permissions

*Sort Option: Name

Select One of the Following

Academic Organization: ECONOMICS

Subject Area:

Class Nbr:

Students In The Report

☒ Enrolled Students

☒ Dropped Students

☒ Waitlisted Students

OEE Start Date Range

From:

To:

Print Class Roster page

- Academic Institution

Enter the academic institution for which you want to print class rosters.
- Term

Enter the term for which you want to print class rosters.
- Assignment
- Session

Enter the session that contains the class rosters that you want to print.
Values for this field are delivered with your system as translate values.
- Display Permissions

Select to display permissions on the printed class roster. If the class section has permissions, the Class Roster report displays the name of the student assigned the permission, the date that the student used the permission, and the expiration date of the permission.
- Sort Option

Select how you want to sort the student data in the class roster:
Name: Select this option to sort the student data in the class roster by name.
Start Date, Name: Select this option to sort the data for students in an OEE class based on the student's class start date.
- Select One of the Following
- Academic Organization

If you want to print class rosters for a specific academic organization, enter a value in this field and do not enter a value in the Subject Area and Class Nbr fields.

Subject Area If you want to print class rosters for a specific subject area, enter a value in this field and do not enter a value in the Academic Organization and Class Nbr fields.

Class Nbr (class number) If you want to print class rosters for a specific class, enter a value in this field and do not enter a value in the Academic Organization and Subject Area fields. You are prompted by the schedule of classes for the specified term.

Students In The Report

Enrolled Students Select this check box if you want the class roster to include the students who are enrolled in the class.

Dropped Students Select this check box if you want the class roster to include the students who have dropped the class.

Waitlisted Students Select this check box if you want the class roster to include the students who are on the wait list for enrollment in the class.

OEE Start Date Range

From Enter a date to filter OEE class rosters, so that only students with an OEE start date greater than or equal to this date are included.

To Enter a maximum OEE start date for this run. Students with an OEE start date that is greater than this date will be excluded.

Run the Class Roster Structured Query Report (SQR) process as needed.

Producing Student Study Lists

A student study list is a list of classes in which a student is enrolled for a term.

This section discusses how to generate student study lists.

Page Used to Produce Student Study Lists

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Study List	RUNCTL_SRSTDYLIST	Records and Enrollment, Enrollment Summaries, Student Study List Report, Student Study List	Generate student study lists.

Generating Student Study Lists

Access the Student Study List page (Records and Enrollment, Enrollment Summaries, Student Study List Report, Student Study List).

Student Study List

Run Control ID: BDHTEST

[Report Manager](#) [Process Monitor](#)

Run

*Institution	*Term	Academic Career	Academic Program		
PSUNV	0505	Undergrad	LAU	+	-

Student Study List page

Institution	Enter the academic institution for which you want to generate student study lists.
Term	Enter the term for which you want to generate student study lists.
Academic Career	Enter a value in this field to generate student study lists for a specific academic career.
Academic Program	Enter a value in this field to generate student study lists for a specific academic program. The Student Group field becomes unavailable for edit.
Student Group	Enter a value in this field to generate student study lists for a specific student group. The Academic Program field becomes unavailable for edit.

Run the Student Class Schedule Report SQR process (SRSTDLSST) and then run the Study List Crystal report. Run the PSJob process only if you are running the process on a server.

Chapter 38

Managing Enrollment Verifications

This chapter discusses how to:

- Produce enrollment verification reports.
- Request enrollment verification through self service.

Producing Enrollment Verification Reports

The Enrollment Verification feature enables you to produce enrollment verification reports for students. You can produce these reports for individual students on-demand or through a batch process using PeopleSoft Process Scheduler. This feature also enables you track the production of enrollment verifications for individual students, enter enrollment verification requests for future dates, and prevent production of enrollment verifications for students with specific service indicators.

This section discusses how to:

- Restrict service indicators from enrollment verification.
- Enter enrollment verification requests.
- Enter recipient address for enrollment verifications.
- Add notes to enrollment verifications.
- Process enrollment verifications in batch.

Pages Used to Produce Enrollment Verification Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Verification Req (enrollment verification request)	ENRL_VER_REQUEST	Records and Enrollment, Enrollment Verifications, Enrollment Verification, Enrollment Verification Req	Enter the content of a student's enrollment verification request. Also view the history of a student's enrollment verification requests.

Page Name	Definition Name	Navigation	Usage
Address	ENRL_VER_REQUEST_2	Records and Enrollment, Enrollment Verifications, Enrollment Verification, Address	Enter the destination address of the enrollment verification and the number of copies to be sent. Direct each request to multiple recipients and addresses. For each recipient, either enter a free-form address or select existing address information already stored in the system.
Notes	ENRL_VER_REQUEST_3	Records and Enrollment, Enrollment Verifications, Enrollment Verification, Notes	Add an optional free-form message to be included on the student's printed enrollment verification report. The message can be unique to each recipient of the report.
Enrollment Verification Print	RUNCTL_ENRL_VER	Records and Enrollment, Enrollment Verifications, Enrollment Verification Print, Enrollment Verification Print	Process and print enrollment verification reports for students in batch based on the academic institution, request date, and whether the report has been previously printed.

Restricting Service Indicators from Enrollment Verification

As you can with academic transcripts, you can set up the system to hold the processing of enrollment verification requests when students have certain negative service indicators. In order for the enrollment verification processes to hold these students' requests, you must first associate the delivered service impact ENVER with a service indicator.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators"

Entering Enrollment Verification Requests

Access the Enrollment Verification Req page (Records and Enrollment, Enrollment Verifications, Enrollment Verification, Enrollment Verification Req).

Enrollment Verification Req		Address	Notes
Ana Beck		SR0400	
		Find View All First 1 of 1 Last	
Sequence Number:	1	On Request	Print
Request Date:	09/14/2004		
*Academic Institution:	PSUNV	PeopleSoft University	
Date to be Printed:	09/14/2004		
Date Processed:			
From Term:			
To Term:			
☒ Current Program	☒ Earned Degrees	☐ Cum and Term GPA	
User ID:	Betty Locherty		

Enrollment Verification Req page

For each request, you can process and print it immediately, process and print it in batch with other requests for a range of days, or hold it for batch processing and printing on a future date. The page displays the student's requests in descending order according to the sequence number of each request, the most recent request appearing on top.

Sequence Number	The number assigned to each request that has been entered for the student.
Request Date	The date on which the request was entered into the system. If you are entering a new request, the system defaults this date to today's date.
Academic Institution	Select the academic institution for which you want to print the request. The system defaults to the academic institution defined for you on the User Defaults component.
Date to be Printed	The system defaults to today's date the date this request is to be printed. If you want to print the request on a future date through the batch enrollment verification process (COBOL program SRPCENVB), select a new date. The enrollment verification process does not print the request until the system date matches this date and the date range of your batch request includes this date.
Date Processed	If the request has already been processed, the system displays the date that the processing occurred.
From Term	To report all terms for which the student has enrollment history, leave this field blank. To print an enrollment verification report for a single term, select the term. To print an enrollment verification report for a range of terms, select the beginning term in the range. The system defaults the value you select to the To Term field.

To Term	This field value defaults from the From Term field value. If you want to print an enrollment verification report for a range of terms, select the latest term in the range.
Current Program	Select to include the student's current academic career, academic program, academic plan, and academic subplan in the printed report. The system selects this option for you by default. Note. To print the student's current program, academic plan, and academic subplan, the Transcript Level field on the Academic Program page, Academic Plan Table page, and Academic Sub-Plan Table page (respectively) must be set to a value other than <i>Not Print</i>.
Earned Degrees	Select to include the student's earned degrees in the printed report. The enrollment verification process prints degrees in degree sequence number order and their associated degree plans in plan sequence number order. If you select this option and the student has no earned degrees, the process excludes this section of information from the printed report.
Cum and Term GPA (cumulative and term grade point average)	Select to include the student's GPA by term and cumulative GPA by academic career on the printed report. Note. To print the student's cumulative GPA by academic career on the request, you must <i>also</i> select the Current Program option.
User ID	If the request has already been processed, then for tracking purposes, the system displays the user ID of the person who entered the request.
Status (not labeled)	The current status of the request, either <i>On Request</i> or <i>Completed</i> .
Print	Click this button to process the request immediately and send the report directly to your default printer. All of the student's academic careers appear on the same report, listed separately by term. The COBOL program SRPCENVR extracts the student data from the STDNT_CAR_TERM table for all academic careers and applicable terms. After this is done, the process updates the request Status field to <i>Completed</i>. Also click this button to reprint a request. The system keeps no record of reprinted enrollment verifications. If the student has no enrollment history based on the request parameters, the system prints a report with the enrollment history header and the message <i>Enrollment History Unavailable</i>. If the student has a service indicator with an attached service impact of ENVER, the system displays the Service Indicator page, indicating that enrollment verification has been prevented due to negative service indicators.

Technical Information

The COBOL program SRPCENVr writes data to two tables, and this data gets printed by Crystal on report SR802---.rpt. One table holds the header data and another table holds the detail data. The COBOL process first outputs the header records—one for each request detail and copy requested. For example, if three copies are requested for address A, three header records are produced with address A. The COBOL process then produces the detail records one time for the whole request. The two tables are joined using the query tool and Crystal, producing the right number of copies for each requested address. You can alter the enrollment verification headers by modifying the SRCCENVr Program ID on the Strings Table page (PeopleTools, Utilities, Use Strings Table).

You can also change the date format for the Enrollment Verification Report (SR802). Access the Define Personalizations page (PeopleTools, Personalization, Personalization Options, Format tab, DFRMT option). You can set the date separator options on the same page, under the DTSP option. These settings control the following fields that appear on the SR802 report:

- Enrollment Verification As of date
- Expected Completion Date
- Declare Dt
- Begin Date
- End Date

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans"

Entering Recipient Addresses for Enrollment Verifications

Access the Address page (Records and Enrollment, Enrollment Verifications, Enrollment Verification, Address).

The screenshot displays the 'Address' tab of an 'Enrollment Verification Req' form. At the top, the user 'Ana Beck' and request ID 'SR0400' are shown. Below this, a summary bar indicates 'Seq #: 1' and 'Request Date: 09/14/2004'. The main form area contains several sections: 'Send to Requestor' (unchecked), 'Specify External Org ID' (checked), 'Org ID' (000010061), 'Send to' (University of Ottawa), 'Country' (CAN), and 'Address' (550 Cumberland Street, PO Box 450, Stn A, Ottawa ON K1N 6N5). There are also fields for 'Location' (1) and '*Number of Copies' (1). A search icon is present next to the Org ID and Country fields. A link 'Edit Address' is visible next to the address text.

Address inquiry page

- Send to Requestor** Select to automatically populate the Send To field with the requestor's name and the address fields with the requestor's home address.
- Specify External Org ID** Select to be able to choose an existing external organization. The system makes available the Org ID and Location fields for this purpose.
- Org ID (organization ID)** This field becomes available when you select the Specify External Org ID check box. Select the organization to which you are sending the enrollment verification request. The field prompts against the Organization Table record. Define external organizations on the Organization Table page. After you press Tab to move out of the field, the system automatically populates the Send To field with the organization's name.
- Location** This field becomes available when you select the Specify External Org ID option. Select the location code of the organization to which you are sending the enrollment verification request. After you press Tab to move out of the field, the system automatically populates the address fields with the location address.
- Send to** Enter the name of the recipient to whom you are sending the enrollment verification report. If you select either the Send to Requestor check box or the Specify External Org ID check box, then this value populates automatically according to your selection; however, you can overwrite it. You can also enter multiple recipients.
- Number of Copies** Enter the number of enrollment verification reports that you want to produce and send to this recipient and address.

Country

Select the country of the recipient's address. After you press Tab to move out of this field, the system displays the address format associated with that country. Enter all of the necessary address information in the address fields that appear. If you select either the Send to Requestor check box or the Specify External Org ID check box, then these fields populate automatically according to your selection. When you process and print the report, either through the Print button on the Enrollment Verification Req page or through the batch process, the address prints so that it appears properly through the window of a #10 envelope.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database"

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Organization Data," "Entering Organization Location Data"

Adding Notes to Enrollment Verifications

Access the Notes page (Records and Enrollment, Enrollment Verifications, Enrollment Verification, Notes).

The screenshot displays the 'Enrollment Verification Req' page with the 'Notes' tab active. At the top, the user 'Ana Beck' and record ID 'SR0400' are shown. Below this, a summary bar indicates 'Seq #: 1' and 'Request Date: 09/14/2004'. The main content area shows 'Organization: University of Ottawa' and 'Location: Mailing Address'. A section titled 'Enrollment Verifications Notes' contains a text box with the message: 'This enrollment verification is provided at the request of the University of Ottawa.'

Notes page

Send To and Organization

The system displays the name of the recipient in these fields.

Enrollment Verification Notes

If you want to include a message on the enrollment verification report, enter it in this text box.

Processing Enrollment Verifications in Batch

Access the Enrollment Verification Print page (Records and Enrollment, Enrollment Verifications, Enrollment Verification Print, Enrollment Verification Print).

Enrollment Verification Print

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

Academic Institution:

PSUNV

PeopleSoft University

Begin Date:

End Date:

09/05/2000

☒ Unprinted Requests Only

Enrollment Verification Print page

Academic Institution	Select the academic institution for which you want to print enrollment verification reports.
Unprinted Requests Only	Select if you want the process to print only the request records that have a status of <i>On Request</i>, as displayed on the Request process page in the Enrollment Verification Req component. The process excludes all previously printed enrollment verification reports. The system selects this check box by default. Note. If you clear this check box, the process reprints any request with a status of <i>Completed</i>. The new report contains all information as of the run date.
Begin DateandEnd Date	In the Request Date group box, select a range of dates to process only the request records entered into the system on or within these dates. By default, the system populates the End Date field with today's date. If you want to print the academic institution's request records for all dates, leave these fields blank. Note. The process does not print request records where the date to be printed value is set to a future date. It prints these records after the date to be printed is on or before the system date and falls within the date range your request for the batch process.

First run the COBOL process SRPCENVB to populate the results tables. PeopleSoft Process Scheduler runs the process at user-defined intervals. Then run the Crystal report SR803---.rpt to generate the enrollment verification reports from the results tables. Each report prints in alphabetical order by the student's name (last name, first name) and displays data according to the criteria selected on the Enrollment Verification Req component. The process extracts the student data from the STDNT_CAR_TERM table for all academic careers and applicable terms. After this is done, the process updates the request status to *Completed*. Run the PSJob only if you are running the process on a server.

If you have set up negative service indicators with a service impact of ENVER and students have one of these service indicators, the SRCENVB process creates error records for these students. If you want to see the list of students who the process excluded due to negative service indicators, then run the Crystal report SR804---.rpt. The report includes the student's name, ID, request number, and the service indicator that has the service impact ENVER.

Technical Information

The COBOL program SRPCENVB writes data to two tables, and Crystal prints this data. One table holds the header data and another table holds the detail data. The COBOL process first outputs the header records, one for each request detail and copy requested. For example, if three copies are requested for address A, three header records are produced with address A. The COBOL process then produces the detail records one time for the whole request. The two tables are joined using the query tool and Crystal, producing the right number of copies for each requested address.

Requesting Enrollment Verifications Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your students can view enrollment verifications directly by using the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Academic Services"

Chapter 39

Processing Transfer Credit

This chapter provides an overview of transfer credit processing and discusses how to:

- Record external course and test information.
- Create student-specific agreements.
- Process course transfer credit.
- Process test transfer credit.
- Process other transfer credit.
- Process transfer credit in batch.
- View and print transfer credit information.
- View transfer credit reports through self service.
- Evaluate transfer credit through self service.

Understanding Transfer Credit Processing

This section lists common elements and discusses transfer credit processing and converting transfer credit units.

Common Elements Used in This Chapter

Academic Plan	(Optional) In the Target Information group box, select the academic plan for which the transfer credit in this row of the transfer model will articulate.
Academic Program	In the Target Information group box, select the academic program for which the transfer credit in this row of the model will articulate.
Add Comments	Click to access the Model Comments page, where you can enter comments about this row of the transfer credit model.

Articulation Term	Select the term for which you want to process the individual's transfer credit for this row of the model. Note that you can articulate credits across multiple terms. You would do this, for example, if a student has continually taken credit outside your academic institution and you have posted credit at each point in time.
Calculate	When you articulate course and test credit, click this button to calculate the individual's transfer credit statistics according to the accepted transfer credit on the corresponding row of the model.
Comment	Click to access the Model Comments page, where you can enter comments about this row of the transfer credit model.
Credit Source Type	In the Source Information group box, select the type of source from which you will be modeling transfer credit on this row. Your selection tells the system from which table you will select your source institution. Values are: <i>External:</i> The system prompts you with the source IDs of external organizations in your system. The External Org ID (external organization ID) and Data Source fields become available. <i>Internal:</i> The system prompts you with source IDs of academic institutions in your system. You select this option, for example, when a student is transferring from one academic career to another within your academic institution. The Source Career and Source Institution fields become available. <i>Manual:</i> If you intend to create transfer credit models manually, do not use this component. If you select this option, the system displays a message instructing you to use the corresponding manual component.
Data Source	For an external credit source type, select the data source from which the individual's external transfer credit has been entered into the system. The data source that you specify must match the data source on the individual's external education record. Values for this field are delivered with your system as translate values. You can modify these values.
Equivalent Subject /Catlg Nbr (equivalent subject and catalog number)	After you run the Transfer Credit process for a model, the system displays the subject and catalog number of the internal course that is equivalent to the transfer credit that it evaluated. The process determines these values for course transfer credit according to the internal equivalent course that is specified for the applicable course transfer equivalency rule on the Subject Area Elements page of the Transfer Subject Area component. The process also determines these values for test transfer credit according to the internal equivalent course that is specified for the applicable test transfer equivalency rule on the Test Credit Rule/Component page. When processing transfer credit manually, after you enter the equivalent subject and catalog number on the Equivalent Course Information page for this row of the model, the process displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

External Org ID (external organization ID)	For an external credit source type, select the external organization from which the individual is transferring credit. Define external organizations on the External Organization page. You access this page from the education record of the transfer prospect, applicant, or student as defined on the Education component.
Group	The Transfer Credit process automatically groups incoming transfer credit and its internal equivalent courses together on separate rows within the grid at the bottom of the page. The number in this field identifies the group as unique among other groups on this row of the transfer credit model. You can, after the Transfer Credit process completes the evaluation, move internal equivalent courses from group to group as needed to alter the articulation model before you post the transfer credit to the individual's record. You can move internal equivalent courses from group to group by using the Move To Group button on the grid row of the course to move.
Include in FA WI Status	Select this check box to indicate that the accepted course must be used to calculate the weeks of instruction component of the student's grade level. By default, the check box is selected for all accepted course credit.
Lock	Select to lock the corresponding group row of the transfer credit model. You might select this check box, for example, if you intend to post or unpost transfer credit for that row at a later date. The groups for which you select this check box are excluded from a rerun of the Transfer Credit process. If you rerun the Transfer Credit process and something about the incoming transfer credit has changed (such as grades or units), then the process displays a red letter Y in front of that group. The Y alerts you that something about that incoming transfer credit changed after the group was locked. You might, therefore, want to investigate the change before you post or unpost the corresponding transfer credit.
Model Nbr (model number)	The system, by default, sets the first row of the transfer credit model to model number 1. The system uses this number to store multiple, unique transfer credit models.
Model Status	The system displays the status of the model on the first page and subsequent page of the component. Values are: <i>Submitted:</i> Indicates that you have run the transfer credit articulation process for this model. <i>Posted:</i> Indicates that you clicked the Post button on the second page of the component and the system has successfully transferred the articulated transfer credit to the student's career term record (STDNT_CAR_TERM table) for this model. <i>Completed:</i> Indicates that you have modeled and articulated the student's transfer credit, but that the model could not be posted to the student's career term record because the student is not currently active in either the academic program or articulation term that you selected for the model. When the student is activated into the academic program and articulation term that you selected, click the Copy TC Units button on the Terms in Residence page. This automatically updates the model status to Posted and writes the data to the STDNT_CAR_TERM table.

Post	Click to post an individual's transfer credit for the corresponding model. Posting automatically saves the page. When you post transfer credit, the system displays the posted transfer credit statistics according to the individual's calculated transfer credit statistics on the page. Posting a transfer credit model also updates the status of the model from <i>Submitted</i> to <i>Posted</i> or <i>Completed</i> . When you post your transfer credit model, the fields in the Target Information group box on the first page of the component become unavailable. To update target information, you must first unpost your model.
Seq # (sequence number)	For transfer credit in which you manually define equivalencies, the system automatically assigns a sequential number to each incoming row of transfer credit to identify unique rows in the table. These sequence numbers have no programming significance.
Source Career	For an internal credit source type, select the academic career from which the student is transferring credit.
Source Institution	For an internal credit source type, select the internal academic institution from which the student is transferring credit.
Status	After you run the Transfer Credit process for this row of the model, the process displays the transfer status of each transfer credit that it evaluated. Possible statuses are <i>Accepted</i> , <i>Rejected</i> , <i>No Rule</i> , and <i>Contingent</i> .
Study Agreements	Click to access the Student Agreements page, where you can view the details of a student's study agreement.
Total Units - Articulation Term	When you articulate test and other credits, the system calculates the individual's total transfer credit units according to the articulation term and incoming transfer credit on the corresponding of the model.
Total Units - Posted Model	When you articulate test and other credits, use this field to view a summary of the credits that have been transferred to the student's record through this model. You can view changes in this field only after you have posted or unposted the model and saved the transaction. The system displays values for this field in relation to the corresponding value in the Total Units - Articulation Term field that you have calculated for the model.
Transcript Level	Select a transcript level to determine the types of transcripts on which the system will include the transfer credit that articulates through this row of the model, provided that it is posted to the individual's record. Values are <i>Not Print</i> , <i>Official</i> , <i>Unofficial</i> , <i>Stdnt Life</i> (student life), and <i>Degr Prog</i> (degree progress).
Transfer Status	After you run the Transfer Credit process for this row of the model, the process displays the transfer status of each transfer credit that it evaluated. Possible statuses are <i>Accepted</i> , <i>Rejected</i> , <i>No Rule</i> , and <i>Contingent</i> .
Unpost	Click to completely remove the transfer credit that is posted through this model from the student's career term record. View the results for the student on the Term Statistics page.



Click the Transfer Status Detail button to access the Transfer Rule Applied page or the Reject Reason page, where you can either view the transfer equivalency rule that the Transfer Credit process applied to the corresponding external course or, if the transfer credit is rejected, view the reject reason. This field applies only to transfer credit processing with predefined course and test equivalency rules.



Click the Edit Equivalent Course button to access the Equivalent Course Information page, where you can edit equivalent course information prior to posting transfer credit.



Click the Reject External Course button to reject incoming courses before you post transfer credit. Only the incoming course on the corresponding row will be rejected. For example, if incoming Math 100 and Math 200 are equivalent to internal Math 104, and you click the reject button on the Math 100 line, the resulting rule will be that Math 200 is equivalent to Math 104.



Click the Add Internal Equivalent button to access the Equivalent Course Information page, where you can add internal equivalent course information.



Click the Delete Internal Equivalent button to delete internal equivalent courses for the corresponding group row. This button appears only if multiple internal equivalent courses exist for that row.



Click the Move to Group button to open a field on the page for another group number. Use this field to move transfer credit from one group into another group. For example, assume that a group has a transfer status of *Rejected*. You can use this feature to move the transfer credit to another group that has a transfer status of *Accepted* to ensure that the transfer credit gets posted.



Click the Comment/Override Reason button to access the Course Credit Comments, Test Credit Comments, or Other Credit Comments pages, where you can add an override reason and comment about any adjustments that you made to a group row of a transfer credit model.

See Also

[Chapter 39, "Processing Transfer Credit," Viewing Student Study Agreements, page 947](#)

[Chapter 14, "Setting Up Transcripts," Defining Transcript Types, page 320](#)

Transfer Credit Processing

When you have set up your predefined transfer rules for courses and tests, you can start processing transfer credit. The Transfer Credit process includes retrieving all external transfer credit information; evaluating these external courses, tests, and other credit; then posting the transfer credit. The PeopleSoft system provides features to enable transfer credit processing by the following methods:

- Using predefined rules.
- Using student-specific agreements.
- Creating manual rules to assign course, test, and other credit.

Our processing design is based on modeling, so you can give individuals options for articulation that depend on the academic program or academic plan that is selected for them.

You can command the system to evaluate transfer credit by using the predefined transfer equivalency rules that you have created and then attached to academic programs and plans. Or you can process transfer credit by creating models manually as you go through processing. For course transfer credit, you can also use student-specific study agreements in conjunction with these predefined course transfer equivalency rules. Whether you are using predefined or manual rules or processing transfer credit manually, the functionality is the same. However, to maximize the use of your time, use only the manual Transfer Credit process to transfer credit for schools from which you rarely receive students.

You should understand some general concepts before you begin processing transfer credit, regardless of which type of transfer credit and method you use. The Transfer Credit process enables you to model as many articulation scenarios for a prospect, applicant, or student as you want. You select the rule for your model (either predefined or manual), command the system to evaluate the scenario on the basis of that rule, revise the results if you want, and save the model or post the credits.

When you have posted credits, the system updates the individual's record. The same is true when you unpost an articulation model—when you have unposted credits, the system updates the individual's academic record. The system removes all the credits that were posted.

Another concept is the grouping of transfer credit. Incoming transfer credit and its internal equivalents are grouped together. The result is known as a *group*. You can, when the Transfer Credit process completes the evaluation, move internal equivalent courses from group to group as needed to alter the articulation before you post the transfer credit to the individual's record. Other features include many buttons that enable you to accept, reject, add, and discard courses from the group. You can also revise details, such as units and grade.

Note. A person does not have to be active in an academic program or academic plan to *create* model-transfer-credit scenarios. However, the student must be active to *post* transfer credit.

See Also

[Chapter 9, "Setting Up Transfer Credit Processing," page 213](#)

Converting Transfer Credit Units

Student Records converts incoming units to the term type of the transfer rule. This enables the system to accurately compare incoming units to the rule. To convert incoming units, the system first determines the number of units taken. Then the system calculates the number of units transferred. At each stage, the system must determine whether it needs to convert the units, and if so, the system converts them.

To calculate the number of units taken, the system:

1. Determines whether the transfer units need to be converted.

The system compares the term type of the course (on the External Courses page) with the term type of the rule (on the Subject Area Elements page). If they are different, the units must be converted. That is, if the student earned four quarter units in MATH 120, and the rule is based on semester units, the system needs to convert the four quarter units to semester units before comparing it to the rule and determining how many units transfer.

2. If yes, the system converts the units.

To convert the units, the system must first determine the correct multiple to use. To find the multiple, the system compares the term type and the external term type of the education record (as shown on the External Data page) with the term type and external term type on the External Term table. You set up external terms with their multiples on the External Term Table page. To convert the units, the system multiplies the number of units earned in the external course (as it appears on the External Courses page) with the multiple.

For example, suppose the system finds that the term type of the external course is quarter and the external term is fall. It would find the corresponding row on the External Term table to find the multiple, which in this case is 0.75. Then it would multiply this by the number of units that the student received, which was 4 in this example. So the equation is 0.75×4 , and the converted value is 3.

3. The system uses the converted value to compare against the rule to determine whether the units meet the requirements of the rule.

The system determines whether the converted value falls within the minimum and maximum unit range set in the rule (Incoming Course Information page). If the converted value falls within the range, the system distributes the units to the internal equivalent and excess unit course as determined by the rule. The system displays the converted units for each incoming course in the Units Taken field on the Equivalent Course Information page.

At this point, the system has determined the number of units taken. It must now determine the number of units transferred according to the transfer credit model.

To calculate the number of units transferred, the system:

1. Determines whether the units must be converted again by comparing the term unit type of the career to the term type of the rule.

You will see on the Transfer Course Details page that the transfer credit model has an academic career. The system finds the term unit type for the career that appears on the model. Term unit type for careers appears on the Academic Career Table 2 page. The system then compares the term unit type of the career with the term type of the rule, as found on the Subject Area Elements page. If the term types are the same, the system does not need to convert the units.

2. If the term unit type of the career is different from the term type of the rule, the system converts the units.

The system converts the units just as it does for calculating the units taken, except that instead of using the term unit type of the education record, it uses the term unit type of the transfer credit model's career.

3. The system displays the calculated results for each incoming course in the Units Transferred field on the Incoming Course Information page.

Previously in Student Records, you had to set the unit value of the incoming equivalent course based on the term type of the incoming credit's institution. Now the system converts the incoming units to the term type of the rule, giving you more flexibility in setting up transfer rules.

Note. If you want unit conversion to occur after the units have been awarded to the internal equivalent and excess unit classes, set the term type on the rule to equal that of the incoming course. In this case, the system does not convert the units to match the rule (they will already match), the system converts them only to match the career of the model.

Understanding Internal Transfer Credit and Unit Conversion

When using unit conversion rules with internal transfer modeling, the system uses the multiple from the Unit Conversion table and converts them as illustrated in the following example.

An undergraduate Engineering student (quarter program) takes an undergraduate three-unit class (semester class), Biology 100, and receives a C. The university then models the student in a UGRD program (semester program).

The system converts the units like this:

1. The system automatically changes the Biology 100 class into quarter units (student receives 4.5 units at enrollment).
2. Transfer credit comes in when the university models the student for a career.
3. If the model is in a semester career, the units are converted to 3 units because the student enrollment units are quarter:

<i>Incoming</i>	<i>Conversion factor</i>	<i>Quarter equivalent</i>
3 semester units	x 1.5	= 4.5

4. The system uses the quarter value to determine whether the criteria for transfer are met.
5. The system looks at the rule and finds the unit value of the internal equivalent class, which in this case is 3:

<i>Internal equivalent value</i>	<i>Conversion factor</i>	<i>Semester equivalent</i>
3 semester units	x .6770	= 2.031

Note. If you want to bypass the rule value and just convert the units in student enrollment to the new career, set the transfer rule to *Specify Maximum Units* on the Subject Area Elements page.

Understanding Grading at Articulation

The Transfer Credit Articulation process determines the grade for internal equivalent courses based on the value that is entered in the Default Grade field on the Subject Area Elements page.

See [Chapter 9, "Setting Up Transfer Credit Processing." Defining Subject Area Elements, page 226.](#)

Recording External Course and Test Information

The first step in processing transfer credit for courses and tests is receiving external course and test information. You enter external course information for individuals in the Education component and external test information in the Test Results component.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Tracking External Education"

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants

Creating Student-Specific Agreements

Student-specific agreements are generally made prior to the student enrolling at your academic institution. Sometimes, however, your course transfer equivalency rules do not satisfy a specific student's situation, or an advisor wants to make a unique transfer agreement with a student.

This section discusses how to:

- Describe student agreements.
- Enter student agreement details.

Pages Used to Create Student-Specific Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Agreements	STDNT_AGRMNT	Records and Enrollment, Transfer Credit Evaluation, Student Agreements, Student Agreements	Describe specific student agreements, and enter the catalog organization and comments.
Student Agreement Courses	STDNT_AGRMNT_CRSE	Records and Enrollment, Transfer Credit Evaluation, Student Agreements, Student Agreement Courses	Enter the external courses and equivalent internal courses of specific study agreements. These study agreement equivalency rules are separate from the course transfer equivalency rules that you might have created and attached to academic programs and plans.

Describing Student Agreements

Access the Student Agreements page (Records and Enrollment, Transfer Credit Evaluation, Student Agreements, Student Agreements).

Student Agreements

Student Agreement Courses

Ana Beck

SR0400

Academic Career:

UGRD

Undergraduate

Academic Institution:

PSUNV

PeopleSoft University

Source ID:

2300022

Santa Barbara City College

Find | View All

First

1 of 1

Last

*Effective Date:

09/30/2004

*Status:

Active

*Description:

Summer courses at SBCC

*Catalog Org Type:

External

*Catalog Organization:

2300022

Santa Barbara City College

Comment:

Ana will enroll in one english course at SBCC over the summer.

*User ID:

PS

Betty Locherty

Student Agreements page

- Catalog Org Type (catalog organization type)

The information in this field designates the table from which you will select a catalog organization for the external courses of the study agreement. Values are:

External: The system prompts you with external organizations in your system.

Internal: The system prompts you with academic institutions in your system.
- Catalog Organization

Select the catalog organization for the external courses of this study agreement. The system prompts you with values based on your selection in the Catalog Org Type field. When you define course equivalencies for this study agreement on the Study Agreement Courses page, the system prompts you with courses based on the catalog organization that you select here.

You can use any external organization or internal academic institution as the catalog organization to define external courses for this study agreement. However, when you define an external course on the Study Agreement Courses page, the Catalog Org Type and Catalog Organization fields become unavailable.
- Comment

Enter any comments that are relevant to this study agreement.
- User ID

Displays the user identification code of the person who entered the study agreement into the system.

Entering Student Agreement Details

Access the Student Agreement Courses page (Records and Enrollment, Transfer Credit Evaluation, Student Agreements, Student Agreement Courses).

Student Agreements

Student Agreement Courses

Ana Beck

SR0400

Academic Career:

UGRD

Undergraduate

Academic Institution:

PSUNV

PeopleSoft University

Source ID:

2300022

Santa Barbara City College

Find | View All

First

1 of 1

Last

Effective Date:

09/30/2004

Find | View All

First

1 of 1

Last

EXTERNAL COURSE

INTERNAL COURSE

Subject:

ENGL

Course Nbr:

17

British Literature

*Units Taken:

4.00

Ext Grd Scheme:

UGR

Ext Grd Basis:

GRD

Minimum Grade:

B

*Course ID:

003274

*Offer Nbr:

1

ENGLLIT

100

*Units Transferred:

3.000

Grading Scheme:

UGD

Undergrad

Grading Basis:

GRD

Graded

Grade:

B

Good

Student Agreement Courses page

EXTERNAL COURSE

Enter the external course information for the study agreement in the EXTERNAL COURSE group box.

- Subject

Select the subject of the course.
- Course Nbr (course number)

Select the course number for the external course. If you are using an external organization for the catalog organization (as defined on the Study Agreements page), the system prompts you with courses that you have associated with the external organization on the School Course Classification page. If you are using an internal academic institution for the catalog organization, the system prompts you with courses that are defined for that academic institution in the Course Catalog component.
- Units Taken

By default, the system displays the units of the external course according to the course definition. You can override this default value.

Ext Grd Scheme (external grading scheme)	Select the grading scheme from which you can select a valid grading basis for this external course.
Ext Grd Basis (external grading basis)	Select a grading basis to define all of the valid grades from which you can select a minimum grade for this external course.
Minimum Grade	Select a minimum grade that the student must receive in this external course for the course to fulfill the study agreement.
Note. On this page, the minimum grade that is needed is a letter grade, whereas in the Course Credit Transfer Rule component the minimum grade is entered as specific grade points. This is a feature intending that advisors who create student-specific agreements might not always be aware of the grading point scheme.	

INTERNAL COURSE

Enter the internal course information for the study agreement in the INTERNAL COURSE group box.

Course ID	Select the internal course that is equivalent to the external course for this study agreement. The system prompts you to select a course from your academic institution's course catalog.
Offer Nbr (offering number)	By default, the system displays the offering number of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value.
Units Transferred	By default, the system displays the units of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value. These units represent the number of units that the student will receive for the internal course if the student fulfills the study agreement.
Grading Scheme	Select a grading scheme from which you can select a valid grading basis for this external course.
Grading Basis	Select a grading basis to define all of the valid grades from which you can select a grade for this internal course.
Grade	Select the grade that the student will receive for the internal course if the student fulfills the study agreement.

Processing Course Transfer Credit

This section provides an overview of course transfer credit processing and discusses how to:

- Process course transfer credit models with predefined rules.

- Calculate and post course transfer credit with predefined rules.
- Process course transfer credit models manually.
- Calculate and post course transfer credit manually.
- View student study agreements.
- View incoming and edit equivalent course information.

Understanding Course Transfer Credit Processing

Two components are available to evaluate course transfer credit, the Course Credits component for predefined rules, and the Course Credits - Manual component for creating manual transfer credit models.

Use the Course Credits component to use predefined course transfer equivalency rules to articulate course transfer credit. Predefined rules can be attached to academic programs, academic plans, and student-specific study agreements. You will create models of articulation based on the source of the transfer credit and the student's academic program and plan. You can create as many models as necessary.

To process course transfer credit using predefined equivalency rules:

1. Set up the source information and target information for the transfer credit model on the Transfer Course Details page.
2. Select the articulation term for the model and command the system to evaluate the courses according to the predefined rules in the Transfer Credit Term group box of the Transfer Course Details page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Transfer Summary page.
4. View summary student statistics, after you have saved a posted or unposted model, in the Course Credits Summary group box of the Transfer Summary page.

Use the Course Credits - Manual component to manually enter transfer credit. This component is designed to be used for course transfer credit from schools from which you rarely receive students. This saves you from having to go through the rule-defining procedure for a few students.

To process course transfer credit manually:

1. Set up the source information and target information for the transfer credit model on the Transfer Course Entry page.
2. Select the articulation term for the model and enter the incoming course and internal equivalent course information in the Transfer Credit Term group box of the Transfer Course Entry page.

Save the page to run the Transfer Credit process and articulate the course credit.

3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Course Credits By Term page.
4. View summary student statistics, after you save a posted or unposted model, in the Course Credits Summary group box of the Course Credits By Term page.

The Sort Order of Transfer Credit Articulation Results

The Detail table (TRNS_CRSE_DTL) holds the results of the transfer credit articulation process, and the data is displayed in the Transfer Credit Term group box on the Transfer Course Details page. The results are sorted in the following manner:

1. Incoming courses that have matching student agreement records.
2. Incoming courses that have exact matches—subject and catalog number for external credits, course ID, and course offering number for internal courses—in the Agreement rule set specified in the Program/Source Equivalency Rule for the model's program.

Within this rule set, rules with higher transfer priority are processed first. Within the same transfer priority numbers, rules with the most number of incoming courses—many-to-many or many-to-one—are evaluated first.

3. Incoming courses that have wildcard matches—subject and partial catalog number—in the Agreement rule set that is specified in the Program/Source Equivalency Rule for the model's program.
4. Incoming courses that have exact matches—subject and catalog number for external credits, course ID, and course offering number for internal—in the Override rule set that is specified in the Program/Source Equivalency Rule for the model's program.

Within this rule set, rules with higher transfer priority are processed first. Within the same transfer priority numbers, rules with the most number of incoming courses—many-to-many or many-to-one—are evaluated first.

5. Incoming courses that have wildcard matches—subject and partial catalog number—in the Override rule set that is specified in the Program/Source Equivalency Rule for the model's program.
6. Incoming courses that have exact matches—subject and catalog number for external credits, course ID, and course offering number for internal—in the Default rule set that is specified in the Program/Source Equivalency Rule for the model's program.

Within this rule set, rules with higher transfer priority are processed first. Within the same transfer priority numbers, rules with the most number of incoming courses—many-to-many or many-to-one—are evaluated first.

7. Incoming courses that have wildcard matches—subject and partial catalog number—in the Default rule set that is specified in the Program/Source Equivalency Rule for the model's program.
8. Rejected courses.

Pages Used to Process Course Transfer Credit

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transfer Course Details	TRNS_CRSE_DTL	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Course Details	Create course transfer credit models and run the Transfer Credit process to evaluate the models. For each model, you specify target information, source information, and the articulation term. Then you run the Transfer Credit process to articulate course transfer credit, using predefined equivalency rules. You can revise the results as necessary.
Transfer Summary	TRNS_CRSE_TERM	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Summary	Calculate an individual's transfer credit statistics, based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.
Transfer Course Entry	TRNS_CRSE_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry	Set up course transfer credit models and articulate transfer credit manually as you set up models rather than by using predefined equivalency rules. This page is essentially the same as the Transfer Course Details page of the Course Credits component with the few exceptions that are described in this section.

Page Name	Definition Name	Navigation	Usage
Course Credits by Term	TRNS_CRSE_TERM	Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of the model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit. This is the same page as the Transfer Summary page of the course credits component.
Student Agreements	STDNT_AGR_CRSE_SEC	Click the Study Agreements link on the Transfer Course Details page or the Transfer Course Entry page. This link is available only if the student has a Student Agreement in the system.	View the details of a student's study agreement, including the external course and the internal equivalent course.
Student Agreement Header Info (student agreement header information)	STDNT_AGR_SEC	Click the Agreement Data link on the Student Agreements page.	View the description, catalog organization, comments about the agreement, and the name of the user who created the study agreement.
Transfer Rule Applied	TRNS_CRSE_RULE_SEC	Click the Transfer Status Detail button on the Transfer Course Details page.	View the course transfer equivalency rule that the Transfer Credit process applied to the corresponding external course. If the course is rejected, the system displays the reject reason. This page applies to transfer credit processing with predefined course equivalency rules.
Reject Reason	TRNS_CRSE_REJR_SEC	Click the Transfer Status Detail button on the Transfer Course Details page.	View the reason why the course transfer equivalency rule was rejected. This page applies only to transfer credit processing with predefined course equivalency rules.

Page Name	Definition Name	Navigation	Usage
Equivalent Course Information	TRNS_CRSE_INT_SEC	Click the Edit Equivalent Course button on the Transfer Course Details page to edit equivalent course information. Click the Add Internal Equivalent button on the Transfer Course Details page to enter additional equivalent courses.	View incoming course credit information for a specific row of a course transfer credit model, and view and edit equivalent course information.
Equivalent Course Information	TRNS_CRSE_MNL1_SEC	Click the Edit Internal Equivalent button on the Transfer Course Entry page.	View details about incoming course credit and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.
Course Credit Comments	TRNS_CRSE_DTL_SEC	Click the Comment/Override Reason button on the Transfer Course Details page or the Transfer Course Entry page.	Add an override reason and comment about any adjustments that you have made to a group row of a transfer credit model.
Model Comments	TRNS_CRSE_SCH_SEC	Click the Add/View Comments link on the Transfer Course Details page or the Transfer Course Entry page.	Add comments about this row of the transfer credit model.

Processing Course Transfer Credit Models with Predefined Rules

Access the Transfer Course Details page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Course Details).

Transfer Course Details

Transfer Summary

Ana Beck

SR0400

Transfer Credit Model

Find | View All

First 2 of 2 Last

Academic Career:

UGRD

Undergraduate

Academic Institution:

PSUNV

PeopleSoft University

*Model Nbr:

2

*Transcript Level:

Unofficial

Target Information

*Academic Program:

LAU

Liberal Arts Undergraduate

Academic Plan:

☒ Apply Agreement

Source Information

*Credit Source Type:

External

External Org ID:

000010146

Long Beach City College

Data Source:

Self-Rpted

Transfer Credit Term

Find | View All

First 1 of 1 Last

*Articulation Term:

0330

1998 Fall

Fetch

Submitted

Equivalency Details

Evaluator Details

*Group	Status	External Term	External Subject / Catalog Nbr	Units Taken	Grade Input	Equivalent Subject / Catlg Nbr	Units Accepted	Grade Basis	Grade	Repeat Code	Incl in FAVM
1	Accepted	1990 FALL	MATH 10	4.00	A	MATH 107	2.000	GRD	T		

Add/View Comments

Transfer Course Details page

Apply Agreement

Select to have the Transfer Credit process use the *agreement* equivalency rule selected for the specified academic program, plan, and source combination on the Rules Specification page. Clear this check box to ignore the specified agreement equivalency rule. By default, the system selects this check box.

(AUS) Level of Education

This mandatory field appears only if the school type assigned to the credit has a DEST credit basis of *0200 Credit Offered for Prior VET Study*.

School types are defined on the School Type Table page.

This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.

DEST Institution Department of Education, Science and Training institution

Note. This field is available only if you select the Australia DEST, HECS, Centrelink, TAC check box on the Academic Institution 6 page.

Enter the DEST institution code from which the transfer credit is coming.

Fetch

After you have selected an articulation term for this row of the course transfer credit model, click this button to run the Transfer Credit process.

The Transfer Credit process COBOL program evaluates the individual's course transfer credit according to the valid course transfer equivalency rules. The process determines valid course transfer equivalency rules for the specified source based on whether the rule is active previous to the begin date of the articulation term and based on whether the rule was attached to the individual's academic program or academic plan for the specified source. The process then compares the individual's external course information to the valid rules and calculates the results. The courses that the process evaluates appear in the grid at the bottom of the page.

Define course transfer equivalency rules on the Transfer Subject Area component and attach them to academic programs and academic plans for the source on the Program/Source Equivalency component. Enter an individual's external course information on the External Courses page of the Education component.

External Term

After you run the Transfer Credit process for this row of the model, the process displays the external term of each course that it evaluated. The process determines the external term for the transfer course according to the value that is entered for the course in the corresponding field on the External Courses page of the Education component.

External Subject/Catalog Nbr
(external subject/catalog number)

After you run the Transfer Credit process for this row of the model, the process displays the external subject and catalog number of each course that it evaluated. The process determines the external subject and catalog number for the transfer course according to the value that is entered for the course in the corresponding fields on the External Courses page of the Education component.

Note. When you post a model, the Source Information group box for that row becomes unavailable.

Note. Using the column heading links to sort data on this page may ungroup external and equivalent courses.

Evaluator Details

Select the Evaluator Details tab.

Transfer Credit Term

Find | View All First 1 of 1 Last

*Articulation Term: 0330 1998 Fall Fetch Submitted

Equivalency Details **Evaluator Details**

*Group	Status	External Term	External Subject / Catalog Nbr	Units Taken	Grade Input	Equivalent Subject / Catlg Nbr	Lock
1	Accepted	1990 FALL	MATH 10	4.00	A	MATH 107	

[Add/View Comments](#)

Transfer Course Details page: Evaluator Details tab

See the Common Elements section at that start of this chapter for information about the icons on this tab.

Calculating and Posting Course Transfer Credit with Predefined Rules

Access the Transfer Summary page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Automated, Transfer Summary).

Transfer Course Details		Transfer Summary	
Jesse Martinez		SR13265	
Transfer Credit Model Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1	Seattle Community College	
Academic Program:	LAU	Liberal Arts Undergraduate	
Admit Type/Term:	First-Year	2004 Fall	
Find View All First 1 of 1 Last			
Articulation Term:	2005 Spr	Posted Date:	29/07/2006
Model Status:	Posted	User ID:	Betty Locherty
		Calculate	Post
Units Taken:	3.00		
Units Transferred:	3.000		
FA Weeks of Instruction Stats Units Taken: 0.00 Units Transferred: 0.000			
Course Credits Summary Units Taken: 3.00 Units Transferred: 3.000			

Transfer Summary page

Calculate

After you articulate course credit, click this button to calculate the individual's transfer credit statistics according to the accepted transfer credit on the corresponding row of the model.

Note. When you post the transfer credit without clicking the Calculate button, the process still calculates the units.

If you selected to include the accepted equivalent courses of this model in the individual's GPA *and* you have transferred grades that include grade points, the system calculates the transfer taken for GPA, the transfer passed for GPA, the transfer grade points, and the transfer GPA.

If you selected to include the accepted equivalent courses of this model in the individual's GPA *and* you transferred grades that are not included in, for example, F grade points, the system calculates the transfer taken not for GPA and the transfer passed not for GPA.

If you have *not* selected to include the accepted equivalent courses of this model in the individual's GPA, the system calculates the units taken and the units transferred.

You can select to include transfer credit in the GPA for external organizations and internal academic institutions on the Organization Affiliation page.

FA Weeks of Instruction Stats

The group box displays transfer course statistics for courses marked to be included in the Financial Aid weeks of instruction calculations. When articulated transfer work is calculated, these values are calculated and stored in the Include in FA WI Stats area. These values are used by the Financial Aid Term process to then calculate the student's academic level.

Note. The calculation of the FA WI Stats values does not affect the calculation of the current articulated transfer work statistics. In addition, the new values are stored in the transfer credit records and are not moved to PS_STDNT_CAR_TERM.

Units Taken	Displays the units that the individual took for the class being transferred.
Units Transferred	Displays the units of the internal equivalent course.

Course Credits Summary

Use the Course Credits Summary group box to view a summary of the course credits that have been transferred to the student's record through this model. You can view changes in this group box only after you have posted or unposted the model and saved the transaction. The system displays values for the fields in this group box in relation to the corresponding values that you calculated for the model on this page.

Processing Course Transfer Credit Models Manually

Access the Transfer Course Entry page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Transfer Course Entry).

Transfer Course Entry		Course Credits by Term	
Jesse Martinez		SR13265	
Find View All First 1 of 3 Last			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
*Model Nbr:	1		
*Transcript Level:	Official		
Target Information			
*Academic Program:	LAU	Liberal Arts Undergraduate	☐ Include in GPA
Academic Plan:			
Source Information			
*Credit Source Type:	Manual		
Source Institution:	Seattle Community College		
School Type:	CC	Community College	

Transfer Course Entry page (1 of 2)

Transfer Credit Term			
Find View All First 1 of 1 Last			
*Articulation Term:	0540	2005 Spr	Posted
Find View All First 1 of 1 Last			
*Group	*Seq#		
1	1		
Status:	Posted		
Details			
Comments			
Incoming Course		Equivalent Course	
Year:	2005	Course ID:	001234 ANTHRO
Subject:	ANTH	Offer Nbr:	1 101
Course Nbr:	101	Units Transferred:	3.000
Description:	Anthropology Basics	Grading Scheme	UGD Undergrad
Units Taken:	3.00	Grading Basis:	GRD Graded
Grade Input:	B	Official Grade:	T Transfer
		Repeat Code:	
		Designation:	
		☐ Include in FA WI Stats	
Add/View Comments			

Transfer Course Entry page (2 of 2)

Target Information

Include in GPA (include in grade point average)

Select to include eligible courses within this model in students' GPA totals and No GPA totals at your academic institution. Clear this check box to include the eligible courses as units only.

Eligible courses are those courses with the Include in GPA check box selected on the Equivalent Course Information page. Conversely, ineligible courses are those with the Include in GPA check box cleared on the Equivalent Course Information page.

The system renders the Include in GPA field on this page unavailable when the model is posted.

Note. The Include in GPA check box in the Target Information group box has no impact on the Academic Advisement engine. The Academic Advisement engine looks at the Include in GPA check box on the Equivalent Course Information page to evaluate course grade points for academic requirements and enrollment requisites.

Source Information

(AUS) Level of Education

This mandatory field appears only if the school type assigned to the credit has a DEST credit basis of *0200 Credit Offered for Prior VET Study*.

School types are defined on the School Type Table page.

This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.

Transfer Credit Term

Details

Click to access the Equivalent Course Information page, where you can edit equivalent course information prior to posting transfer credit.

Comments

Click to access the Course Credit Comments page, where you can add an override reason and comment about any adjustments that you have made to this row of the model.

Incoming Course

Use the Incoming Course group box to define your external course information for this row of the transfer credit model.

Year

Enter the year in which the incoming course was taken.

Ext Term (external term)

Select the external term for each external course that you enter.

Subject	Enter the subject area of the incoming course.
Course Nbr (course number)	Enter the course number for the incoming course.
Description	Enter the description of the incoming course.
Units Taken	Enter the units taken for the incoming course.
Grade Input	Enter the grade received for the incoming course.

Equivalent Course

Use the Equivalent Course group box to define the internal course that is equivalent to the incoming course for this row of the transfer credit model. The system matches classes based on year, external term, subject, course number, units taken, and grade input.

Course ID	Select the course that is equivalent to the incoming course for this row. The system prompts you to select a course from your academic institution's course catalog.
Offer Nbr (offering number)	By default, the system displays the offering number of the course that you selected according to the definition of the course in your academic institution's course catalog. You can override this default value.
Units Transferred	If you select the From Incoming Course option on the Academic Career Table page, the value in this field appears by default from the Units Taken field in the Incoming Course group box for the course that has the same group and sequence number. If you select the From Course Catalog option on the Academic Career Table page, the value in this field appears by default from the Maximum Units field in the Course Catalog (CRSE_CATALOG) component. Regardless of the option that you select on the Academic Career Table page, you can override the default value in this field to transfer a different number of units.
Grading Scheme	Select the grading scheme of the specified internal equivalent course. This grading scheme defines all of the valid grading bases from which you can select an official grade for the specified internal equivalent course.
Grading Basis	Select the grading basis for the specified internal equivalent course. This grading basis defines all of the valid grades from which you can select an official grade for the specified internal equivalent course.
Official Grade	Select the official grade of the specified internal equivalent course. This official grade defines the grade that an individual receives for the specified internal equivalent course. The value entered here is included in the student's cumulative GPA at your academic institution, provided that you selected the Include in GPA check box on this page and the Equivalent Course Information page.

Repeat Code

Select a repeat code, if applicable.

Repeat codes work in conjunction with repeat rules to determine whether a repeated class violates your repeat policies. When the repeat checking process runs, it searches the student's enrollment history to find class enrollments with matching course IDs. When it finds a match, it determines whether the repeat is legal based on the repeat rules that you define.

When the repeat checking process identifies a course that violates a repeat rule, the process assigns the class enrollment a repeat code. This repeat code determines how the class enrollment is treated in the student's academic statistics, such as whether the grade is used to calculate the student's grade point average. The repeat code that the repeat checking process assigns appears here.

Designation

Use this field to select a requirement designation for the class enrollment.

Save

After you select an articulation term and enter the incoming course and internal equivalent course information for this row of the course transfer credit model, click Save.

See Also

[Chapter 39, "Processing Transfer Credit," Viewing Incoming and Editing Equivalent Course Information, page 947](#)

[Chapter 5, "Setting Up Repeat Checking," page 47](#)

[Chapter 23, "Performing Repeat Checking," page 533](#)

Calculating and Posting Course Transfer Credit Manually

Access the Course Credits by Term page (Records and Enrollment, Transfer Credit Evaluation, Course Credits - Manual, Course Credits by Term).

Transfer Course Entry		Course Credits by Term	
Jesse Martinez		SR13265	
Transfer Credit Model Find View All First 1 of 1 Last			
Academic Career:	UGRD	Undergraduate	
Academic Institution:	PSUNV	PeopleSoft University	
Model Nbr:	1		
Academic Program:	LAU	Liberal Arts Undergraduate	
Admit Type/Term:	First-Year	2004 Fall	
Find View All First 1 of 1 Last			
Articulation Term:	2005 Spr	Posted Date:	29/07/2006
Model Status:	Posted	User ID:	Betty Locherty
		Calculate	Post
Units Taken:	3.00		
Units Transferred:	3.000		
FA Weeks of Instruction Stats			
Units Taken:	0.00		
Units Transferred:	0.000		
Course Credits Summary			
Units Taken:	3.00		
Units Transferred:	3.000		

Course Credits by Term page

Note. If transfer credit has been posted for a student and then a change is made to his or her record and the data is reposted, an input change flag appears on the page.

FA Weeks of Instruction Stats

The group box displays transfer course statistics for courses marked to be included in the Financial Aid weeks of instruction calculations. When articulated transfer work is calculated, these values are calculated and stored in the Include in FA WI Stats area. These values are used by the Financial Aid Term process to then calculate the student's academic level.

Note. The calculation of the FA WI Stats values does not affect the calculation of the current articulated transfer work statistics. In addition, the new values are stored in the transfer credit records and are not moved to PS_STDNT_CAR_TERM.

Units Taken Displays the units that the individual took for the class being transferred.

Units Transferred Displays the units of the internal equivalent course.

Viewing Student Study Agreements

Access the Student Agreements page (click the Study Agreements link on the Transfer Course Details page or the Transfer Course Entry page).

Note. If you enter a course that is a duplicate, the system gives you a warning. You can cancel and fix the duplicate or continue with the post. If you continue with the post and attach the external course to both instances of the class, repeat checking will place repeat codes on the class.

Agreement Data

Click to access the Student Agreement Header Info (student agreement header information) page, where you can view header information about the student-specific study agreement.

Viewing Incoming and Editing Equivalent Course Information

Access the Equivalent Course Information page (click the Edit Equivalent Course button on the Transfer Course Details page to edit equivalent course information).

Equivalent Course Information			
Incoming Course			
Term Year:	2005	SPR	
Subject:	ANTH	Course Nbr:	101
Description:	Anthropology Basics		
Units Taken:	3.00	Grade Input:	B
		Crse Level:	
OK Cancel			
Equivalent Course			
Course ID:	001234		Introduction to Anthropology
Offer Nbr:	1		ANTHRO 101
Units Transferred:	3.000		☒ Valid Attempt
Grading Scheme:	UGD		Undergraduate Grading Scheme
Grading Basis:	GRD		Graded
Official Grade:	T		Transfer
Repeat Code:			
Designation:			
Clear			
☒ Include in FA WI Stats			
		Grd Pt/Unt:	3.000
		☒ Earn Credit	
		☐ Include in GPA	
		Units Att:	Yes

Equivalent Course Information page

Incoming Course

Use the Incoming Course group box to view details about the external course information for this row of the transfer credit model.

Crse Level (course level) The level for this course at the specified external organization. Values for this field are delivered with your system as translate values. You can modify these values.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

See Also

Chapter 39, "Processing Transfer Credit," Viewing Incoming and Editing Equivalent Course Information, page 947

Processing Test Transfer Credit

This section provides an overview of test transfer credit processing and discusses how to:

- Process test transfer credit models with predefined rules.
- Calculate and post test transfer credit with predefined rules.
- Process test transfer credit models manually.
- Calculate and post test transfer credit manually.
- Enter incoming test and equivalent course information.

Understanding Test Transfer Credit Processing

Two components are available to evaluate test transfer credit, the Test Credits - Automated component for predefined rules and the Test Credits - Manual component for creating test credit models manually. After you have set up your test codes and test components and you have read the Processing Course Transfer Credit section, the pages for processing test credit will be familiar.

Use the Test Credits - Automated component if you want to use predefined test transfer equivalency rules to articulate test transfer credit. You can attach predefined rules to academic programs and academic plans. You will create models of articulation based on the individual's academic program or academic plan. You can create as many models as necessary.

To process test transfer credit using predefined equivalency rules:

1. Set up the target information for the transfer credit model on the Test Credit Details page.

2. Select the articulation term for the model and tell the system to evaluate the test credit according to the predefined rules on the Test Credit Details page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Test Credits By Term page.
4. View summary student statistics, after you have saved a posted or unposted model, in the Total Units - Posted Model field on the Test Credits by Term page.

Use the Test Credits - Manual component to enter transfer credit manually with equivalencies that you enter as you proceed. This component is designed for test transfer credit from sources from which you rarely receive test results. This saves you from having to go through the rule-defining procedure for a few students.

To process test transfer credit manually:

1. Set up the target information for the transfer credit model on the Test Credit Entry page.
2. Select the articulation term for the model and enter the incoming test and internal equivalent course information on the Test Credit Entry page.

Save the page to run the Transfer Credit process and articulate the test credit.

3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Test Credits By Term page.
4. View summary student statistics, after you have posted a model, in the Total Units - Posted Model field on the Test Credits By Term page.

Pages Used to Process Test Transfer Credit

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Test Credit Details	TRNS_TEST_DETAIL	Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit Details	Create test transfer credit models and run the Transfer Credit process to evaluate the models. For each model, specify a target academic program, the academic plan if applicable, and the articulation term. Then run the Transfer Credit process. You can revise the results as necessary.

Page Name	Definition Name	Navigation	Usage
Test Credit by Term	TRNS_TEST_TERM	- Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term - Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit by Term	Calculate an individual's transfer credit statistics for a model based on the accepted internal equivalent courses of a transfer credit model. After you view the statistics for the transfer credit model, you can post the transfer credit to an individual's record. You can also use this page to unpost transfer credit.
Test Credit Entry	TRNS_TEST_ENTRY	Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry	Set up test transfer credit models and articulate transfer credit by creating test transfer models manually rather than by using predefined equivalency rules. This page is essentially the same as the Test Credit Details page of the Test Credits component, with the few exceptions that are described in this section.
Transfer Rule Applied	TRNS_TEST_RULE_SEC	Click the Transfer Status Detail button on the Test Credit Details page.	View the test transfer equivalency rule that the Transfer Credit process applied to the corresponding external course. If the test is rejected, the Reject Reason page displays the reject reason. The Transfer Rule Applied page applies only to transfer credit processing with predefined test equivalency rules.
Reject Reason	TRNS_TEST_REJR_SEC	Click the Transfer Status Detail button on the Test Credit Details page.	View the reason why the test transfer equivalency rule was rejected. This page applies only to transfer credit processing with predefined test equivalency rules.

Page Name	Definition Name	Navigation	Usage
Equivalent Course Information	TRNS_TEST_INT_SEC	Click the Edit Equivalent Course button on the Test Credit Details page to edit equivalent course information.	View incoming test credit information for a specific row of a test transfer credit model, view and edit equivalent course information, and enter additional equivalent courses and corresponding information.
Equivalent Course Information	TRNS_TEST_EDIT_SEC	Click the Edit Equivalent Course button on the Test Credit Entry page.	Add incoming test credit information and internal equivalent course information for a specific row of a test transfer credit model for which you are manually defining equivalencies.
Test Credit Comments	TRNS_TEST_DTL_SEC	Click the Comment/Override Reason button on the Test Credit Details page or the Test Credit Entry page.	Add an override reason and comment about any adjustments that you made to a group row of a transfer credit model.
Model Comments	TRNS_TEST_MOD_SEC	Click the Comment link on the Test Credit Details page or the Test Credit Entry page.	Add comments about this test transfer credit model.

Processing Test Transfer Credit Models with Predefined Rules

Access the Test Credit Details page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit Details).

Test Credit Details
Test Credit by Term

Marlo Nascimiento
SR0812

Find | View All
First 1 of 1 Last

Academic Career: UGRD Undergraduate
Academic Institution: PSUNV PeopleSoft University
***Model Nbr:** 1
***Transcript Level:** Unofficial

Target Information

***Academic Program:** LAU Liberal Arts Undergraduate ☐ Include in GPA
Academic Plan:

Find | View All
First 1 of 1 Last

***Articulation Term:** 0350 1999 Spring Posted

*Group	Status		Test ID	Test Component	Equivalent Subject / Catlg Nbr	Lock
1	Posted	i	AP	ENG C	ENGLIT 100	
2	Posted	i	AP	FRA	FREN 101	

[Add/View Comments](#)

Test Credit Details page

Fetch

After you select an articulation term for this row of the course transfer credit model, click this button to run the Transfer Credit process. The Transfer Credit process COBOL program evaluates the individual's test transfer credit according to the valid test transfer equivalency rules. The process determines valid course transfer equivalency rules, based on whether the rule is active previous to the begin date of the articulation term and based on whether the rule has been attached to the individual's academic program or academic plan. The process then compares the individual's external test information to the valid rules and calculates the results. The tests that the process evaluates appear in the grid at the bottom of the page. Define test transfer equivalency rules on the Test Credit Rule / Component page and attached to academic programs and academic plans for the source on the Test Credit Equivalency page. An individual's external test information is entered on the Test Results component.

Test ID

After you run the Transfer Credit process for this row of the model, the process displays the identification code of each test that it evaluated. The process determines the individual's tests according to the value entered for the test in the corresponding fields on the Test Results component.

Test Component

After you run the Transfer Credit process for this row of the model, the process displays the component of each test that it evaluated. The process determines the individual's test components according to the value that is entered for the test in the corresponding fields on the Test Results component.

Note. Using the column heading links to sort data on this page may ungroup external and equivalent courses.

Calculating and Posting Test Transfer Credit with Predefined Rules

Access the Test Credit by Term page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Automated, Test Credit by Term).

The screenshot displays the 'Test Credit by Term' page. At the top, there are tabs for 'Test Credit Entry' and 'Test Credit by Term'. Below the tabs, the student's name 'Jesse Martinez' and ID 'SR13265' are shown. The page is divided into several sections:

- Academic Information:**
 - Academic Career: UGRD Undergraduate
 - Academic Institution: PSUNV PeopleSoft University
 - Model Nbr: 1
 - Academic Program: LAU Liberal Arts Undergraduate
 - Admit Term: 0530 2004 Fall
- Articulation Information:**
 - Articulation Term: 2006 Fall
 - Posted Date: 03/25/2008
 - Model Status: Posted
 - User: Betty Locherty
- Units Transferred:** 3.000
- FA Weeks of Instruction Stats:**
 - Units Transferred: 3.000
- Test Credits Summary:**
 - Units Transferred: 3.000

Buttons for 'Calculate', 'Post', and 'Unpost' are located between the 'Articulation Information' and 'Units Transferred' sections.

Test Credit by Term page

The units of the internal equivalent course appear in the Units Transferred field in the FA Weeks of Instruction Stats (financial aid weeks of instruction statistics) group box.

Processing Test Transfer Credit Models Manually

Access the Test Credit Entry page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit Entry).

Test Credit Entry | Test Credit by Term

Marlo Nascimienta SR0812

Find | View All First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: PSUNV PeopleSoft University

***Model Nbr:** 1

***Transcript Level:** Unofficial

Target Information

***Academic Program:** LAU Liberal Arts Undergraduate ☐ Include in GPA

Academic Plan:

Find | View All First 1 of 1 Last

***Articulation Term:** 0350 1999 Spring Posted

*Group	*Seq#	Status	Test ID	Test Component	Equivalent Subject / Catlg Nbr
1	1	Posted	AP	ENG C	ENGLIT 100
2	1	Posted	AP	FRA	FREN 101

[Add/View Comments](#)

Test Credit Entry page

Test ID

After you select a test ID on the Equivalent Course Information page for this row of the model, the system displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

Test Component

After you select a test component on the Equivalent Course Information page for this row of the model, the system displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.

Save

After you select an articulation term and enter the incoming test credit and internal equivalent course information for this row of the test transfer credit model, click Save to run the Transfer Credit process. The Transfer Credit process COBOL engine evaluates the individual's test transfer credit according to the test credit and internal equivalent information on the Incoming Course information page.

Calculating and Posting Test Transfer Credit Manually

Access the Test Credit by Term page (Records and Enrollment, Transfer Credit Evaluation, Test Credits - Manual, Test Credit by Term).

The Test Credit by Term page in the Test Credits - Manual component is the same page as the Test Credits By Term page in the Test Credits Component.

See Also

Chapter 39, "Processing Transfer Credit," Calculating and Posting Course Transfer Credit Manually, page 945

Entering Incoming Test and Equivalent Course Information

Access the Equivalent Course Information page (click the Edit Equivalent Course button on the Test Credit Entry page).

Equivalent Course Information

Test Credit Input

Test ID:

AP

Adv Plcmnt

Component:

EH

European HistWorld Cultures

Data Source:

ACT

Test Score:

4.00

Test Date:

05/12/2006

Percentile:

Equivalent Course

Course ID:

003274

Surv Brit Lit

Offer Nbr:

1

ENGLIT 100

Units Transferred:

3.000

☒ Valid Attempt

Grading Scheme:

UGD

Undergraduate Grading Scheme

☒ Earn Credit

Grading Basis:

GRD

Graded

☐ Include in GPA

Official Grade:

T

Transfer

Grd PtUnt: 3.000

Repeat Code:

Units Att: Yes

Designation:

☒ Include in FA WI Stats

Equivalent Course Information page

Test Credit Input

Use the Test Credit Input group box to enter test information.

- Test ID

The identification number of the test for which you are defining a course equivalency.
- Component

The component of the test for which you are defining a course equivalency.
- Test Date

The date that the test was taken.
- Test Score

The individual's test score.

Data Source	The data source.
Percentile	The percentile of the individual's score.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Processing Other Transfer Credit

This section provides an overview of other transfer credit processing and discusses how to:

- Process other transfer credit models.
- Calculate and post other transfer credit.
- Add incoming other credit and equivalent course information.

Understanding Other Transfer Credit Processing

Processing other transfer credit, credit for prior learning, is always a manual process. The pages in the Other Credit component are very similar to those in the Course Credit and Test Credit components. After you have read the Processing Course Transfer Credit section, the pages for processing other credit will be familiar.

The other credit category is appropriate because it requires no external organization information. However, you must assign other credit through a course in your academic institution's course catalog. Therefore, you might set up special summary courses in the course catalog, then grant the student additional transfer credits using these special courses.

To process other transfer credit:

1. Set up the target information for the transfer credit model on the Other Credit Detail page.
2. Select the articulation term for the model and enter the equivalent course information on the Other Credit Detail page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Other Credit By Term page.
4. View summary student statistics, after you have posted a model, in the Total Units - Posted Model field on the Test Credits By Term page.

Pages Used to Process Other Transfer Credit

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Other Credit Detail	TRNS_OTHR_DETAIL	Records and Enrollment, Transfer Credit Evaluation, Other Credits - Manual, Other Credit Detail	Set up other transfer credit models and articulate transfer credit. For each model, you specify target information, the articulation term, other credit information, and internal equivalent course information.
Other Credit by Term	TRNS_OTHR_TERM	Records and Enrollment, Transfer Credit Evaluation, Other Credits - Manual, Other Credit by Term	Calculate transfer units statistics for a model, post and unpost transfer credit, and view a summary of transfer credit statistics.
Equivalent Course Information	TRNS_OTHR_EDIT_SEC	Click the Edit Equivalent Course button on the Other Credit Detail page.	Add incoming other credit information and internal equivalent course information for a specific model. You can also use this page to edit information that you have previously saved.
Other Credit Comments	TRNS_OTHR_DTL_SEC	Click the Comment/Override Reason button on the Other Credit Detail page.	Add an override reason and comment about any adjustments that you have made to a group row of a transfer credit model.
Model Comments	TRNS_OTHR_MOD_SEC	Click the Comment button on the Other Credit Detail page.	Add comments about this row of the transfer credit model.

Processing Other Transfer Credit Models

Access the Other Credit Detail page (Records and Enrollment, Transfer Credit Evaluation, Other Credits - Manual, Other Credit Detail).

Other Credit Detail

Other Credit by Term

Mark Jones

SR11006

Find | View All

First 1 of 1 Last

Academic Career:

UGRD Undergraduate

Academic Institution:

PSUNV PeopleSoft University

Model Nbr:

1

*Transcript Level:

Official

Target Information

*Academic Program:

FAU

Fine Arts Undergraduate

☐ Include in GPA

Academic Plan:

Find | View All

First 1 of 1 Last

*Articulation Term:

0410

2000 Fall

Posted

*Group	*Seq#	Status	Other Credit	Equivalent Subject / Catlg Nbr
1	1	Posted	Product Management Experience	BUSADM 525

Add/View Comments

Other Credit Detail page

- Other Credit

After you enter other credit on the Equivalent Course Information page for this row of the model, the process displays your selection in this field. You access the Equivalent Course Information page by clicking the Edit Equivalent Course button on the corresponding row of the model.
- Save

After you select an articulation term and enter the incoming other credit and internal equivalent course information for this row of the other transfer credit model, click Save.

Calculating and Posting Other Transfer Credit

Access the Other Credit by Term page (Records and Enrollment, Transfer Credit Evaluation, Other Credits - Manual, Other Credit by Term).

Other Credit Detail		Other Credit by Term	
Jesse Martinez		SR13265	
Find View All First 1 of 1 Last			
Academic Career:	UGRD Undergraduate		
Academic Institution:	PSUNV PeopleSoft University		
Model Nbr:	1		
Academic Program:	LAU Liberal Arts Undergraduate	Admit Term:	2004 Fall
Find View All First 1 of 1 Last			
Articulation Term:	2007 Fall	Posted Date:	03/25/2008
Model Status:	Posted	User:	Betty Locherty
Calculate Post Unpost			
Units Transferred:	3.000		
FA Weeks of Instruction Stats			
Units Transferred:	3.000		
Other Credits Summary			
Units Transferred:	3.000		

Other Credit by Term page

The units of the internal equivalent course appear in Units Transferred field in the FA Weeks of Instruction Stats (financial aid weeks of instruction statistics) group box.

Adding Incoming Other Credit and Equivalent Course Information

Access the Equivalent Course Information page (click the Edit Equivalent Course button on the Other Credit Detail page).

Equivalent Course Information

Other Credit

Other Credit:

Work Experience

Short Desc:

Wrk Exp

Long Description:

Work Experience

Other Credit Type:

Work Exper

Evaluation Date:

03/25/2008

Equivalent Course

Course ID:

001015

Calculus I for Engineering

Offer Nbr:

1

MATH 121

Units Transferred:

3.000

Grading Scheme:

UGD

Undergraduate Grading Scheme

Grading Basis:

GRD

Graded

Official Grade:

T

Transfer

Repeat Code:

Designation:

☒ Valid Attempt

☒ Earn Credit

☐ Include in GPA

Grd Pt/Unt:

3.000

Units Att:

Yes

☒ Include in FA WI Stats

Equivalent Course Information page

Other Credit

Use the Other Credit group box to enter information about other credit.

- Other Credit

Enter a description of the other credit.
- Short Desc (short description)

Enter a short description of the other credit.
- Long Description

Enter a long description of the other credit.
- Other Credit Type

Select the type of other credit. Values for this field are delivered with your system as translate values. You can modify these values.
- Evaluation Date

Enter the evaluation date of the other credit.
- Clear Credit

Click to clear the fields in the Other Credit group box. This button works for new data that you are entering and data that you have previously saved in the fields.

Equivalent Course

Use the Equivalent Course group box to enter internal equivalent course information.

Processing Transfer Credit in Batch

This section provides an overview of batch transfer credit processing and discusses how to:

- Post transfer credit in batch.
- View process results for batch posting of transfer credit.

Understanding Batch Transfer Credit Processing

Processing a student's transfer credit can be a complicated and time-consuming process. Aside from transferring credit from an external organization to your academic institution, you might want to move a student's credit from one academic career to another or from one internal academic institution to another.

To facilitate processing transfer credit, use the Batch Transfer Credit feature. This feature enables you to process transfer credit by batch, simplifying your online data entry and reducing processing time. Provided that you have already entered the student's external education record and defined the transfer credit equivalency rules, you can submit a request to have transfer credit modeled for a group of students who match the parameters that you specify. When you submit your request, the system performs the model setup, transfer articulation, and posting processes for all students in the group.

To process transfer credit by batch:

1. Define the posting process on the Process Definitions page.
2. Define the processing parameters—the group of students to process by batch—on the Transfer Credit Batch page, then run the process through PeopleSoft Process Scheduler.

Pages Used to Process Transfer Credit in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transfer Credit Batch	RUNCTL_SR_TRCRBP	Records and Enrollment, Transfer Credit Evaluation, Batch Posting, Transfer Credit Batch	Post transfer credit in batch. Process parameters include the student's identification code and the keys that the system will use in retrieving incoming transfer credit, plus the target academic career, academic program, academic plan (where applicable), and articulation term.

Page Name	Definition Name	Navigation	Usage
Process Results	RUNCTL_SR_TRCRBPER	Records and Enrollment, Transfer Credit Evaluation, Batch Posting, Process Results	View information that is related to the process that you have run on the Transfer Credit Batch page. To view a student's statistics after you run the process, go to the student's individual transfer credit record on the appropriate component—either external course credit, test credit, or other credit.

Posting Transfer Credit in Batch

Access the Transfer Credit Batch page (Records and Enrollment, Transfer Credit Evaluation, Batch Posting, Transfer Credit Batch).

Transfer Credit Batch page

Group Nbr (group number)

The group number is the numeric counter that distinguishes each row of the process instance from other rows. By default, the system displays the first group as 1 and increases the number by one as you add groups to the process instance.

Description

Enter a description of the group to uniquely identify the group.

Processing Option

Select from the following values the processing option to use for this run of the process. Depending on the option that you select, you can create models in batch, post models in batch, or do both at the same time.

Create Model: Select to create transfer credit models based on the student external education record for external transfers or based on the academic career record for internal transfers.

Post Model: Select to post models that have already been created. If the student is active in the articulation term and academic program that you select, the system posts the transfer credit to each affected student's career term record, sets the transfer model to posted, then automatically runs the Repeat Checking process. If a student is not active in the articulation term and academic program that you select, the system does not post the transfer model. Instead, the system sets the transfer model status to *Completed*. When the student is activated for the specified academic program and articulation term, you can move the transfer statistics to the student's career term record using the transfer credit copy function on the Terms in Residence page.

Create and Post Model: Select to create the model and then post it in the same run of the process.

Apply Agreement

Select to have the Transfer Credit process use the *agreement* equivalency rule that is selected for the specified academic program, academic plan, and source combination on the Rules Specification page. Clear this check box to ignore the specified agreement equivalency rule. By default, the system selects this check box.

Overlay Unposted Models

Select if you are rerunning the batch and you want to overlay any unposted models.

Transcript Level

Select a specific transcript level. If left blank, the default set at *Academic Career* is used.

Transfer Credit Source

In the Transfer Credit Source group box, select the type of source from which you will be modeling transfer credit for this group. Your selection instructs the system from which table you will be selecting your source.

External

Select to have the system prompt you with the source IDs of external organizations in your system. The External Org ID and Data Source fields appear and are available.

Internal

Select to have the system prompt you with source IDs of academic institutions in your system. You would select this option, for example, when a student is transferring from one academic career to another within your academic institution. The Source Career and Source Institution fields appear and are available.

External Org ID (external organization identification)

For an external transfer credit source, select the external organization from which you are processing transferring credit.

Data Source	For an external transfer credit source, select the data source from which the individual's external transfer credit has been entered into the system. Values for this field are delivered with your system as translate values. You can modify these values.
Source Career	For an internal transfer credit source, select the academic career from which you are processing transfer credit.
Source Institution	For an internal transfer credit source, select the internal academic institution from which you are processing transferring credit.

Transfer Credit Target

Use the grid in the lower portion of the page to enter student ID and target information within your academic institution for each student for whom you want to process transfer credit by batch within the group.

ID	Select the identification code of each student for whom you want to process transfer credit in the group. The system prompts you with IDs from the personal data table (PERSONAL_DATA).
Academic Career	Select the academic career to which the specified student's transfer courses will articulate.
Academic Institution	Select the academic institution to which the specified student's transfer courses will articulate.
Academic Program	Select the academic program to which this student's transfer in this row credit will articulate.
Academic Plan	Select the academic plan to which the specified student's transfer credit in this row will articulate. This field is optional. However, if an academic plan is specified, the individual must be active in that academic plan before the transfer credit is posted.
Articulation Term	Select the term for which you want to process the specified student's transfer credit for this row. Note that you cannot articulate credits across multiple terms by inserting additional rows for the student. You would do this, for example, if a student has continually taken credit outside your academic institution over time and you have posted credit at each point in time.

Run the Transfer Credit Batch Posting job (SRPCTCBI) as needed. The job consists of two processes—the Transfer Credit Batch Posting process and the Repeat Rule Driver process (SRPCERTD). Both processes are COBOL/SQL.

Depending on the processing options that you select, the Transfer Credit Batch Posting process performs one of the following actions: creates transfer credit models, posts transfer credit, or creates models and posts transfer credit by batch, for the defined group of students. When you initiate the process with the latter option set, the process goes through the records of each student that you have entered and validates your input parameters, creates the transfer credit model, calculates transfer credit articulation, and posts the credits to the student's academic career term. Students can be in multiple groups in the same run control process for which transfer work for multiple institutions exists.

If you need to change the results, you can do so on a student-by-student basis by editing the transfer credit model that the background process creates. You adjust the results the same way that you would adjust them if you were modeling one student at a time. First, unpost the transfer credit. Then adjust one or more courses manually. Finally, repost the transfer credit.

The Repeat Rule Driver process launches the Repeat Checking process, checking the newly posted course credit on each affected student's career term record against existing course credit to identify repeated courses.

Note. The system uses the begin date of the articulation term as the effective date when validating which equivalency rules are valid.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing System IDs"

Viewing Process Results for Batch Posting of Transfer Credit

Access the Process Results page (Records and Enrollment, Transfer Credit Evaluation, Batch Posting, Process Results).

Refresh

Click to display the messages and description of the process instance. If you rerun the process, click this button to view the messages and descriptions from the most recent run. The system populates the page with the most recent message log information.

Viewing and Printing Transfer Credit Information

This section discusses how to:

- View academic test summaries.
- View schools by group.
- Retrieve transfer credit summaries.
- View and print transfer credit summaries.
- Print transfer credit summaries in batch.

Pages Used to View and Print Transfer Credit Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Test Summary	STDNT_TEST_SUMMARY	Records and Enrollment, Transfer Credit Evaluation, Academic Test Summary, Academic Test Summary	View a summary of academic test information for prospects and applicants, such as test score and data source.
Organization Groups Summary	ORG_GROUP_SUMM	Records and Enrollment, Transfer Credit Rules, Schools by Group, Organization Groups Summary	View schools, or any type of organization, in groups that you designate. You can display the list in the order that you choose.
Transfer Credit Summary - Selection Criteria	SRTC_RPT_DTL	Records and Enrollment, Transfer Credit Evaluation, Transfer Credit Summary, Selection Criteria	Define the selection criteria to search for transfer credit summaries.
Transfer Credit Summary - Selection Result	SRTC_RPT_DTL_RSLT	Records and Enrollment, Transfer Credit Evaluation, Transfer Credit Summary, Selection Result	View and print transfer credit summaries for individuals. The system displays transfer credit summaries based on your selection criteria on the Selection Criteria page.
Evaluation Reports	RUNCTL_SR_TRCR_RPT	Records and Enrollment, Transfer Credit Evaluation, Transfer Evaluation Report, Evaluation Reports	Print transfer credit summary evaluation reports for multiple individuals at the same time.

Viewing Academic Test Summaries

Access the Academic Test Summary page (Records and Enrollment, Transfer Credit Evaluation, Academic Test Summary, Academic Test Summary).

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants

Viewing Schools by Group

Access the Organization Groups Summary page (Records and Enrollment, Transfer Credit Rules, Schools by Group, Organization Groups Summary).

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Organization Data," Viewing Organizations by Group Types

Retrieving Transfer Credit Summaries

Access the Transfer Credit Summary - Selection Criteria page (Records and Enrollment, Transfer Credit Evaluation, Transfer Credit Summary, Selection Criteria).

Selection Criteria

Selection Result

ID:

SR11004

Robert Armstrong

*Academic Institution:

PSUNV

PeopleSoft University

Submit

Academic Career

☒ All Careers

Academic Career:

☐ Career/Program/Plan

Academic Program:

Academic Plan:

Filter Options

*Posted Status:

All

Articulation Term:

Sort Order (for Printed Report)

Articulation Term:

Ascending

Transfer Credit Summary - Selection Criteria inquiry page

ID	Select the ID of the individual whose transfer credit summary you want to view or print. The system prompts you with IDs from the personal data table (PERSONAL_DATA).
Academic Institution	Select the academic institution for which the specified individual's transfer credit was processed.
All Careers	Select to retrieve transfer credit summaries for all academic careers that are associated with the specified individual.
Career/Program/Plan	Select to retrieve the specified individual's transfer credit summaries within a specific academic career, target academic program, and target academic plan. The Academic Career, Academic Program, and Academic Plan fields become available when you select this option.
Academic Career	Select a specific academic career for which you want to retrieve the specified individual's transfer credit summaries.

Academic Program	Select a specific academic program for which you want to retrieve the specified individual's transfer credit summaries.
Academic Plan	Select a specific academic plan for which you want to retrieve the specified individual's transfer credit summaries.
Posted Status	This filter option enables you to retrieve transfer credit summaries for the specified individual, based on transfer status. Values are: <i>All</i>: Enables you to retrieve all transfer credit summaries regardless of transfer status. <i>Completed</i>: Enables you to retrieve only transfer credit summaries in which transfer credit has been evaluated and models created but the individual does not yet have an academic program, academic plan, and term activation record for the academic program and articulation term as defined on the transfer credit model. <i>Modeled</i>: Enables you to retrieve only transfer credit summaries in which models have been created. <i>Posted</i>: Enables you to retrieve transfer credit summaries for transfer credit that have been posted to a student's career term records (STDNT_CAR_TERM table). This differs from the <i>Completed</i> status because the individual has an academic program, academic plan, and term activation record for the academic program and articulation term as defined on the transfer credit model.
Articulation Term	This filter option enables you to select a specific term for which transfer credit has been processed. The system displays only models that have been processed for the articulation term that you specify.
Articulation Term	This sort order option enables you to view and print models based on the begin date of the articulation term. Two options are available: <i>Ascending</i> and <i>Descending</i> . <i>Ascending</i> prints models from the oldest to the newest articulation term. <i>Descending</i> prints models from the newest to the oldest articulation term.
Submit	After you have defined your selection criteria and filtering options, click this button to retrieve the transfer credit summaries for the specified individual according to your selection criteria. When the retrieval process is complete, the system automatically displays the Selection Result page.

Viewing and Printing Transfer Credit Summaries

Access the Transfer Credit Summary - Selection Result page (Records and Enrollment, Transfer Credit Evaluation, Transfer Credit Summary, Selection Result).

Selection Criteria		Selection Result							
ID:	SR11004	Robert Armstrong	Process Instance: 386 Report Manager						
		Find View All First 1 of 1 Last							
Transfer Credit Type: Course Credits									
		Find View All First 1 of 1 Last							
Model Nbr:	3								
Institution:	PeopleSoft University								
Career:	Undergraduate								
Acad Prog:	Liberal Arts Undergraduate								
Acad Plan:									
Transfer Type:	Manual								
Source School:	Cambridge College								
Articulation Term	Group	External Subject / Catalog Nbr	Units Taken	Grade Input	Status	Equivalent Subject / Catlg Nbr	Units Transferred	Official Grade	Reject Reason
0410	1	Posted ART 100	3.00	A	Posted	ART 101	3.000	A	
0410	2	Posted DANCE 100	3.00	A	Posted	DANCE 130	3.000	A	
0410	3	Posted GREEK 101	3.00	A	Posted	GREEK 100	3.000	A	

Transfer Credit Summary - Selection Result inquiry page

Generate Report

Click to run the SQR (Structured Query Report) report (SRTCSTEV). The report contains the same information as the summary page with the addition of a Repeat field for a student who has already completed course work at the institution. The report is designed in an easy-to-read format intended to be distributed to prospects, applicants, students, recruiters, or advisors. They can see what classes transferred and to which equivalent classes. They can also view their internal and external GPAs.

Important! To print the report, you must first make some changes to your run control definitions.

Articulation Term

The articulation term for which the transfer credit was processed.

Group

The group number within the model that associates incoming transfer credit with its internal equivalent courses. The number in this field identifies the group as unique among other groups.

Model Status

The status of the transfer credit model. Values are: *Submitted*, *Completed*, and *Posted*.

External Subject / Catalog Nbr (external subject/catalog number)

The external subject and catalog number of the class being transferred.

Units Taken

The units that the individual took for the class being transferred.

Grade Input

The grade that the individual received for the class being transferred.

Status

The transfer status of the credit being transferred. Possible transfer status values are *Accepted*, *Contingent*, *Posted*, *No Rule*, and *Rejected*.

Equivalent Subject / Catlg Nbr (equivalent subject/catalog number)	The subject and catalog number of the internal course that is equivalent to the transfer credit.
Units Transferred	The units of the internal equivalent course.
Official Grade	The individual's official grade for the internal equivalent course.
Reject Reason	If the transfer credit was rejected, the system displays the reject reason.

Printing Transfer Credit Summaries in Batch

Access the Evaluation Reports page (Records and Enrollment, Transfer Credit Evaluation, Transfer Evaluation Report, Evaluation Reports).

Evaluation Reports

Run Control ID: 1

[Report Manager](#)[Process Monitor](#)

Run

Selection Criteria

*Academic Institution:

PSUNV

PeopleSoft University

Academic Career:

UGRD

Undergraduate

Academic Program:

LAU

Liberal Arts Undergraduate

Academic Plan:

Filter Options

*Posted Status:

All

Articulation Term:

Sort Order

Order by:

Name

Evaluation Reports page

Academic Institution	Click to select the academic institution for which transfer credit was processed.
Academic Career	Select a specific academic career for which you want to retrieve the transfer credit summaries.
Academic Program	Select a specific academic program for which you want to retrieve the transfer credit summaries.

Academic Plan	Select a specific academic plan for which you want to retrieve transfer credit summaries.
Posted Status	This filter option enables you to retrieve transfer credit summaries based on transfer status. Values are: <i>All</i>: Enables you to retrieve all transfer credit summaries regardless of transfer status. <i>Completed</i>: Enables you to retrieve only transfer credit summaries in which transfer credit has been evaluated and models created but the individual does not yet have an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model. <i>Modeled</i>: Enables you to retrieve only transfer credit summaries in which models have been created. <i>Posted</i>: Enables you to retrieve transfer credit summaries for transfer credit that has been posted to a student's career term records (STDNT_CAR_TERM table). This differs from the <i>Completed</i> status because the individual is a matriculated student who has an academic program, academic plan, and term activation record for the academic program and articulation term, as defined on the transfer credit model.
Articulation Term	This filter option enables you to select a specific term for which transfer credit has been processed. The system displays only models that have been processed for the articulation term that you specify.
Order By	In the Sort Order group box, select the order in which you want the system to sort the transfer credit summaries. Values are: <i>Name</i>: The system prints transfer credit summary reports in alphabetical order by last name, first name. <i>ID</i>: The system prints transfer credit summary reports in ID order.
Submit	After you have defined selection criteria and filtering options, click this button to run the Student Transfer Credit Evaluation SQR report (SRTCSTEV), using PeopleSoft Process Scheduler, for the specified individual according to your selection criteria.

Viewing Transfer Credit Reports Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your instructors can view transfer credit reports directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Transfer Credit," Viewing Transfer Credit Reports Through Self-Service Pages

Evaluating Transfer Credit Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your self-service users can create course transfer credit models based on transfer courses from external organizations or from internal academic careers and programs.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Transfer Credit," Evaluating Transfer Credit Through Self-Service Pages

Chapter 40

Tracking Attendance

This chapter provides an overview of attendance tracking and discusses how to:

- Generate individual attendance rosters.
- Generate batch attendance rosters.
- Print attendance rosters.
- Use attendance rosters.

See Also

[Chapter 10, "Setting Up Attendance Tracking," page 257](#)

Understanding Attendance Tracking

Depending on your business requirements, you might need to track student attendance. Some state agencies require institutions to track student attendance by hours or minutes. Often attendance tracking affects funding decisions. Using the PeopleSoft Campus Solutions Attendance Tracking feature, you can meet these needs. The Attendance Tracking feature enables you to record all of the necessary details about a period of interaction between your students and instructors. You can do the following:

- View attendance records online or print them for manual use.
- Track a wide range of attendance statistics, such as late arrivals and time spent in class.
- Track student attendance in a class section, component, or unit of instruction.
- Generate attendance rosters for individual classes or for multiple classes.
- Track student attendance in any type of course, such as traditional courses, remedial courses, contract courses, extension courses, and courses with nontraditional modes of delivery (such as online instruction, modular instruction, open entry and open exit, distance learning, and so on).
- Create attendance rosters for non-classroom events, such as field trips.

Generating Attendance Rosters

After you schedule classes and enroll students, you can create attendance rosters by using either the Class Attendance page or the Attendance Roster Generator page. Through the Class Attendance page, you can create attendance rosters for one class meeting or for all class meetings within a single scheduled class. Through the Attendance Roster Generator page, you can create attendance rosters for all scheduled classes or for a selection of scheduled classes, within a term.

Each class meeting has its own roster, which comprises the student name and ID, term, session, class section, meeting pattern, attendance date, attendance type, contact hours, and each student's attendance record. The attendance type and the type of student attendance data that you can track are defined on the Course Catalog - Component page. You can use any of these three pages to access the attendance rosters that you generate—each page offers both a different view and a different method of access.

When you generate attendance rosters, the system creates a roster for every scheduled class meeting within your processing parameters and creates a template (a data entry page where you can enter attendance detail for each student) for each class meeting date. You can add new templates, thus adding attendance rosters for class meetings that are not officially scheduled (for example, a field trip to the observatory). For each class meeting, you can view student attendance details. If necessary, you can insert new rows for students who are not formally enrolled in the class (for example, a student who is participating in the class and planning to enroll if space on the waiting list becomes available).

With either attendance roster generation process (batch or online), you can populate your attendance rosters either by downloading from student enrollment (select the Populate from Student Enroll check box) or by building your attendance rosters from scratch (clear the Populate from Student Enroll check box). If you populate your attendance rosters by downloading from student enrollment, the system populates each roster with student names and IDs. If you choose to build an attendance roster, generate the attendance rosters and the system creates blank templates for each class meeting. Each template has the class attendance date and contact hours, based on the class meeting pattern in the schedule of classes and the class meeting attendance type that your institution uses. You can then use the Class Attendance page to scroll through the class meeting dates, select the specific class meeting dates for which to generate attendance rosters, and populate each of these specific class meeting rosters from student enrollment by clicking the Create button that corresponds to each of these class meetings. You can also enter student IDs by using the Class Attendance page, the Class Attendance By Template page, or the Student Attendance page. Changes that you make on any of these pages are immediately visible in all three components.

After you generate attendance rosters, you can use the Class Attendance page, the Class Attendance By Template page, and the Student Attendance page to track student attendance. Each page provides you with a different view and a different method of access.

Note. You can track events that are not course-related using the Plan Events component in PeopleSoft Campus Community.

Generating Individual Class Attendance Rosters

To generate an attendance roster for a single class:

1. Access the Attendance Roster By Class page and click the Generate button to generate templates for every class meeting within a scheduled class, or click the Create button to generate a template for a single class meeting.

2. Click the View button to access the Class Attendance Detail page and enter attendance for a specific meeting online.
3. (Optional) Print the roster for an individual meeting by clicking the meeting button.

Prerequisites

Schedule the class and assign at least one attendance type on the Schedule of Classes - Basic Data page. The classes for which you generate attendance rosters must have scheduled meeting patterns, and the Generate Class Meeting Attendance check box must be selected on both the Course Catalog - Components page and Schedule of Classes - Basic Data page.

Pages Used to Generate Individual Class Attendance Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Attendance Roster By Class	CLASS_ATTENDANCE	Curriculum Management, Attendance Roster, Attendance Roster By Class, Attendance Roster By Class	Generate or update attendance rosters for individual classes and class meetings. You can also use this page to track student attendance and view, update, and print the attendance rosters for each class meeting.
Class Attendance	CLASS_ATTEND_RSTR	Click the View button on the Attendance Roster By Class page.	Track student attendance for a class meeting.

Generating Attendance Rosters for Individual Classes

Access the Attendance Roster By Class page (Curriculum Management, Attendance Roster, Attendance Roster By Class, Attendance Roster By Class).

Attendance Roster By Class

Course ID:	003274	Term:	2003 Fall
Course Name:	Surv Brit Lit	Session:	Regular Academic Session
Subject / Catalog#:	ENGLIT 100	Institution:	PeopleSoft University
Class Nbr:	1111	Instructor:	
Class Section:	1		

☒ **Populate from Student Enroll**
☐ **Generate Class Mtg Attendance**

[Report Manager](#)

Student Attendance Roster											
Customize Find View All First 1-5 of 45 Last											
				Template Nbr	Type	*Attendance Date	*From Time	*To Time	Contact Minutes	Override	
1	Create	Print	View	1	Class Meeting	08/27/2003	11:00AM	11:50AM	50	☐	+ -
2	Create	Print	View	2	Class Meeting	08/29/2003	11:00AM	11:50AM	50	☐	+ -
3	Create	Print	View	3	Class Meeting	09/03/2003	11:00AM	11:50AM	50	☐	+ -
4	Create	Print	View	4	Class Meeting	09/05/2003	11:00AM	11:50AM	50	☐	+ -
5	Create	Print	View	5	Class Meeting	09/08/2003	11:00AM	11:50AM	50	☐	+ -

Attendance Roster By Class page

When you change attendance rosters using the Attendance Roster By Class page, the system reflects these changes on the Class Attendance By Template page and the Student Attendance page.

Generate

Click to create attendance rosters for all class meetings within this scheduled class. The system populates the grid with templates for each class meeting.

When you click the Generate button, it is important to remember that the system always uses the class meeting attendance type defined on the Academic Institution 3 page.

Report Manager

Click to print generated attendance rosters for all class meetings.

Populate from Student Enroll

Select to have the system populate attendance rosters with the enrolled students for every class meeting within this scheduled class when you generate or create attendance rosters. The system selects this check box by default.

If you clear this check box and click the Generate button, the system creates blank attendance rosters for every class meeting. You can then scroll through the class meeting dates in the grid located in the lower portion of the page, select the View link for the specific class meeting dates for which to track attendance, and manually enter student IDs.

Processing Options

Select one of the three radio buttons to specify the type of process to run. These work in concert with the Generate button only. These do not work in concert with the Create button. Values are the following:

Create: Select this option when you want to create new rosters or replace old ones.

Update Attendance/All Students: Select this option when you want to add, but not delete students from the specified group of rosters. Students who have dropped are set to inactive status by having the Present flag set to Off. The system adds new students to the rosters, but only marks these students as present for the class sessions that occur after the add date.

Update Attendance/Active Only: Select this option if you want to add and delete students from the roster based on their current enrollment statuses in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how rosters are updated. Use this option when a student drops a class and you want to remove the student and leave no attendance history.

Attendance From Date and Attendance To Date

Use the Attendance From Date and the Attendance To Date fields to specify the range of rosters to update. These fields appear only for classes where the Generate Class Meeting Attendance check box is selected on the Components and Basic Data pages. If displayed, the system populates the fields with the class begin and end date, as specified on the schedule of classes. You can change these values. If you manually change the attendance from and to date range, the system creates or updates rosters for meetings that are greater than or equal to the Attendance From Date field and less than or equal to the Attendance To Date field.

Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career and would thus appear on the attendance record twice.

If students add, drop, or change their personal data in a class after you have generated the attendance roster, you can click the Create button to generate new attendance rosters. Provided that you select the Populate from Student Enroll check box, the system generates new rosters that include these changes. You can also click the Create button to generate new attendance rosters when the class meeting pattern in the schedule of classes changes. For example, perhaps the class meeting time is rescheduled from 8:00 a.m. to 9:00 a.m., or class meeting dates are changed from *MWF* to *TR*. You can regenerate the class meeting attendance rosters to reflect the new date or time.

Warning! The Generate button always functions as though you are generating attendance rosters from scratch. Therefore, if you have already entered student attendance data into any of the attendance rosters, you should click the Create button associated with each individual attendance roster template. You should *not* click the Generate button or you will lose the attendance data that you have already entered into the rosters.

Generate Class Mtg Attendance (generate class meeting attendance)

This check box is a display-only check box on this page and is set on the Schedule of Classes - Basic Data page. It determines whether the class can be included in batch roster generation, and it affects which radio buttons and from and to date fields appear.

Create

Click this button on the corresponding meeting row to generate or regenerate an attendance roster for that class meeting row. The system automatically populates the template by downloading data from student enrollment regardless of whether you select the Populate From Student Enroll check box.

You can use the Create button to generate attendance rosters that you enter manually, to generate attendance rosters for additional class meetings that are not formally scheduled, and to update attendance rosters with the latest student enrollment and personal data.

To generate attendance rosters manually, enter the attendance information into a row and click the corresponding Create button. For example, perhaps your institution wants to track attendance for milestone periods within a class such as the 30 percent and 70 percent periods.

To generate attendance rosters for additional class meetings, click the Add button to insert a new row anywhere in the grid, then enter the necessary attendance information, and click the corresponding Create button. For example, perhaps you have added a field trip to the course.

To update attendance rosters with the latest enrollment data, you first must select the Override check box on a row within the grid. Then, click the Create button for that row. You do not need to select the Populate from Student Enroll check box because it works in conjunction with the Generate button. You might update attendance rosters when students have added or dropped the class or when there has been a change to student personal data, such as their first names or last names. You can also click the Generate button to update enrollment information for all class meetings of the scheduled class rather than changing only one class meeting. However, you should only click the Generate button *before* you manually enter attendance data into your rosters because it creates new rosters, overwriting and replacing existing information.

Print

Click the Print button on a data row to print an attendance roster for a specific class meeting. This Crystal report process automatically creates a web output in portable document format (PDF).

Click the Report Manager link to access and print the roster.

View

Click this button on a data row to view and enter information for an attendance roster.

Template Nbr (template number)

The system generates a template number for each class meeting of the scheduled class. The template number identifies each attendance roster as unique and also denotes the order in which the system prints the attendance rosters. When you change a template number and save the page, the next time that you access the page the system positions the template numbers in numerical order.

Type

Indicates the roster attendance type for the class meeting, such as *Class Meeting*, *Conference*, *Field Trip*, *Instructor Consultation*, or *Study Group*. The attendance type determines which attendance tracking fields the system uses for the attendance roster. When you generate attendance rosters the first time for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the default attendance type value from the Academic Institution 3 page. If you want to use an attendance type value other than the default, change the value in the Type field for each attendance roster template. When you exit the field, the system makes the change and updates the fields that appear on the roster (according to the selected options for this particular course component and attendance type on the Components page). Values for this field are delivered with your system as translate values. You can modify these values. This is a required field.

To use attendance types, define the attendance types and their associated fields for course components on the Components page.

See Chapter 10, "Setting Up Attendance Tracking," *Defining Attendance Type Translate Values*, page 258.

The system displays the *Attendance Date*, *From Time*, *To Time*, and *Contact Minutes* for each class meeting on both the detail and summary rows of a class meeting attendance roster template. When you generate attendance rosters for all class meetings within a scheduled class, either by using the Class Attendance page or the Attendance Roster Generator page, the system assigns each attendance roster these four values based on the class meeting pattern in the schedule of classes. When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must assign these values manually.

Attendance Date

Indicates the date of the class meeting. You can change this value. This field is required.

From Time

Designates the start time of the class meeting. This field appears on attendance rosters of this course component only when you select the Use To and From Time check box for the attendance type on the Components page. You can change this value.

To Time

Designates the end time of the class meeting. This field appears on attendance rosters of this course component only when you select the Use To and From Time check box for the Attendance Type on the Components page. You can change this value.

Contact Minutes

Indicates the total length of the class meeting in minutes and is the difference between the to time and from time values. This field appears on attendance rosters of this course component only when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.

Override

Select this check box if you want to update an existing attendance roster with the latest student enrollment information and personal data. Then, when you click the Create button on the same row, the system generates new attendance rosters that contain the latest student enrollment information and personal data and overwrites the previous roster. You can select this check box, for example, if you have already generated class meeting attendance rosters and then students enroll in the course, drop from the course, or change their personal data.

Entering Class Attendance Detail

Access the Class Attendance page (click the View button on the Attendance Roster By Class page).

Class Attendance

Course ID:003274

Course Name:Surv Brit Lit

Subject / Catalog#:ENGLLIT 100

Class Nbr:1111

Class Section:1

Term:2003 Fall

Session:Regular Academic Session

Institution:PeopleSoft University

Instructor:

Template Nbr:1

Attendance Type:Meeting

Attendance Date:08/27/2003

Student Attendance Roster

Customize

Find

View All

First

1-2 of 2

Last

	*Student ID	Name	Career	Present	Tardy	Left Early	Reason	From Time	*To Time	Contact Minutes		
1	SR13582	Basile,Valerie	Undergraduate	☒	☐	☐		11:00AM	11:50AM	50	+	-
2	SR135662	Chavez,Angela	Undergraduate	☒	☐	☐		11:00AM	11:50AM	50	+	-

Class Attendance page

Student ID and Name

The system displays the ID and name of each student enrolled in the class when you generate attendance rosters and opt to have the system populate from data from student enrollment. If you generate rosters and do not select the Populate from Student Enroll check box, you can enter the IDs manually, and the system displays each student's name in the Name field after you exit the Student ID field. Insert rows to add students who are not formally enrolled in the class to the class meeting attendance roster; delete rows to remove students from the class meeting attendance roster. Adding students to the roster does not enroll them in the class. It is for personal tracking only.

Warning! If you entered attendance data into your rosters and you want to add or remove a student from the attendance roster for class meetings (because the student has recently enrolled in or dropped from the class), you can add or remove them from the roster manually, or you can click the Create button on the corresponding class meeting template (with the Override check box selected). This generates a new attendance roster for one class meeting with the latest student enrollment information. Generating attendance rosters by clicking the Generate button in the upper portion of the page creates new attendance rosters for all the class meetings. You would therefore lose any attendance data that you have already entered into the rosters.

Academic Career

The system displays the academic career of the student. This is useful if you track the types of students who enroll in classes, such as how many undergraduate students are in a class compared to how many graduate students.

Present

Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component only if you select the Use Present check box for this class meeting's attendance type on the Components page.

Tardy

Select to indicate that the student arrived late to the class meeting. This field appears on the attendance rosters of this course component only if you select the Use Tardy check box for this class meeting's attendance type on the Components page.

Left Early

Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component only if you select the Use Left Early check box for this class meeting's attendance type on the Components page.

Reason

Select a reason to describe a reason for a student's presence, tardiness, or early departure. This field appears on the attendance rosters of this course component if you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.

From Time	Indicates the time that the student arrived at the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters, and you can change only the from time to a value that falls within the template's time range.
To Time	Indicates the time that the student left the class meeting. This field appears on attendance rosters of this course component if you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the To Time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the Template define the parameters of the From Time and To Time fields on the attendance roster, and you can change only the to time to a value that falls within the template's time range.
Contact Minutes	Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component if you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.
Attendance Date	Indicates the date on which the student attended the class meeting. This field appears on attendance rosters of this course component if you select the Override Template Date/Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the attendance date on a student-by-student basis. Otherwise, the attendance date for the template defines the value for the Attendance Date field.

Generating Batch Attendance Rosters

This section provides an overview of batch attendance roster generation and discusses how to generate attendance rosters in batch mode.

Understanding Batch Attendance Roster Generation

The following list discusses some of the reasons why you would need to run the batch attendance roster generation process:

- Create new rosters or update existing rosters based on a certain date range.
- Update rosters because students add or drop classes after you generate the initial rosters.
- Update the roster with only newly added students and keep on record those students who have dropped or withdrawn from classes.

To generate attendance rosters in batch:

1. Access the Attendance Roster generator page and specify your run parameters.
2. Click the Roster Options link to access the Roster Generator Options page where you can specify roster options for a specific sequence item in your run control set.
3. Click the Run button on the Attendance Roster generator page.

Prerequisites

Before you can generate attendance rosters in batch, you must:

- Define scheduled meeting patterns for the classes for which you generate attendance rosters.
- Select the Generate Class Meeting Attendance check box on the Course Catalog - Components page.
- Select the Generate Class Meeting Attendance check box on the Schedule of Classes - Basic Data page.

Pages Used to Generate a Batch of Attendance Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Attendance Roster Generator	RUNCTL_SRPCATNP	Curriculum Management, Attendance Roster, Generate Attendance Roster, Attendance Roster Generator	Create or update attendance rosters for multiple classes within a term, based on the criteria and options that you select.
Roster Generator Options	ATT_ROS_GEN_SEC	Click the Roster Options link on the Attendance Roster Generator page.	Narrow your processing parameters.

Running the Attendance Roster Generator Process

Access the Attendance Roster Generator page (Curriculum Management, Attendance Roster, Generate Attendance Roster, Attendance Roster Generator).

Attendance Roster Generator

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSUNV  PeopleSoft University

*Term: 0505  2003 Fall

Attendance Create/Update Flag: Create Attendance 

Commit Frequency: 1

Attendance From Date: 08/31/2001 

Attendance To Date: 12/14/2004 

Sequence	Class Nbr	Session	Acad Org	Campus	Subject		
1						Roster Options	+ -

Attendance Roster Generator page

Academic Institution The institution for which to generate rosters. The system populates this field with the value from the User Defaults 1 page, which you can change. This field is required.

Term Select the term that contains the classes for which to generate attendance rosters. Term values are defined on the Term Table page.

Attendance Create/Update Flag Use this field to specify a default for the same field on the Roster Generator Options page. This is a default that you can change on a row-by-row basis by clicking the Roster Options link in the grid. Values for the default are the following:

Create Attendance: Select when you want to create new rosters or replace old ones.

Update Attendance/Active Only: Select when you want to add and delete students from the roster, based upon their current enrollment statuses in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how the system updates rosters. Select this option when a student drops the class and you want to remove the student and leave no attendance history.

Update Attendance/All Students: Select when you want to add, but *not* delete students from the specified group of rosters. Students who have dropped are made inactive when their Present flag is set to *Off*. New students will be added to the rosters, but they can be marked only as present or otherwise for the class sessions that occur after the add date.

Commit Frequency The system populates the commit frequency field with 1 by default. The lower the commit frequency, the better concurrence of data. While a higher commit frequency enables faster processing of the job, the job could get tied up with another process. You should leave the commit frequency at 1.

Attendance From Date and Attendance To Date

Use these fields to specify defaults for the grid below them. These values determine which rosters the process updates. If you do not specify a default, the system sets the values in the grid to the length of each class as defined on the schedule of classes, enabling you to update all of the term's rosters (like a wild card). If you manually specify a separate attendance from date and to date range on the Roster Generator Options page, the process updates class rosters only for those dates that are greater than or equal to the Attendance From Date field and less than or equal to the Attendance To Date field.

Use the fields in the grid, and click the Roster Options link, to indicate specific criteria for each sequence number. The system uses this detail to determine which attendance rosters it generates when you run the process. Select as many selection criteria as necessary. Insert rows as needed.

Sequence

The system sets the sequence number to 1 and increases it by one for each row that you add to the request. The number specifies the order in which the system processes class attendance rosters.

Class Nbr (class number)

Enter the class number for which to generate attendance rosters. The system prompts you with the classes that are defined in the schedule of classes for the term. After you enter the class number, exit the field, and the system populates and hides some of the remaining fields on both the Attendance Roster Generator page and the Roster Generator Options page.

Session

Select the session for which to generate attendance rosters. The system prompts you with the sessions that are defined for the term. Values for this field are delivered with your system as translate values. You can modify these values.

Acad Org(academic organization)

Select the academic organization for which to generate attendance rosters. Academic organization values are defined on the Academic Organization Table page.

Campus

Select the campus for which to generate rosters. Campus values are defined on the Campus Table page.

Subject

Select the subject area for which to generate the rosters. Subject area values are defined on the Academic Subject Table page.

Roster Options

Click to access the Roster Generator Options page, where you can further specify your processing parameters for each sequence number.

Note. Because your institution can define multiple meeting attendance types for a course in the course catalog, the system uses the class meeting attendance type on the Academic Institution 3 page for all attendance rosters that you generate by using the Attendance Roster Generator page. The attendance type indicates the type of attendance roster, such as Class Meeting, Conference, Field Trip, Instructor Consultation, or Study Group. If you want to create attendance rosters with different attendance types from that of the default, change the value for individual class meetings on the Class Attendance page and Class Attendance By Template page, or you can change it for individual students on the Student Attendance page.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRATTEND process at user-defined intervals. After the process finishes, the system makes the row unavailable but continues to display the processing parameters so that you can view a history of what you have done. These rows have no impact on future processing. You can click the Delete button to delete them.

Entering Roster Generator Options

Access the Roster Generator Options page (click the Roster Options link on the Attendance Roster Generator page).

Attendance Roster Generator

Roster Generator Options

Attendance From Date:

Attendance To Date:

Catalog Number From:

Catalog Number To:

Class Start Date From:

Class Start Date To:

☒ Populate from Student Enroll

☒ Generate Class Mtg Attendance

☒ Sync Attendance with Class Mtg

Attendance Create/Update Flag:

Create Attendance

Roster Generator Options page

Attendance From Dateand Attendance To Date

Use these fields to specify the range of rosters to create or update. Only class rosters that are for dates greater than or equal to those in the Attendance From Date field and less than or equal to those in the Attendance To Date field are updated. If you do not specify a value, the system sets the fields to the values on the Attendance Roster Generator page. If you do not specify from and to dates on either the Attendance Roster Generator page or the Roster Generator Options page, the system sets the values to the length of each class as defined on the schedule of classes. This enables you to update all of the term's rosters.

Catalog Number From and Catalog Number To

If you have a specific range of catalog numbers within a subject area for which to generate rosters, enter a value in the Catalog Number From and Catalog Number To fields.

Class Start Date From and Class Start Date To

If you have a specific start date range for which to generate attendance rosters, enter a value in the Class Start Date From and Class Start Date To fields. If you enter an individual class number in the grid on the Attendance Roster Generator page, the system hides these fields *and* populates them with the class start date from the Schedule of Classes - Meetings page.

Populate From Student Enroll

Select to have the system populate attendance rosters with the enrolled students for every scheduled class meeting that matches your processing criteria. The system selects this check box by default. If you clear this check box, the system still creates attendance rosters for every class meeting but you will have to manually enter the students and their enrollment data into the rosters.

Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career, and would thus appear on the attendance record twice.

Generate Class Mtg Attendance (generate class meeting attendance)

Select to have the system generate or regenerate attendance rosters only for classes in which you select the Generate Class Mtg Attendance (generate class meeting attendance) check box on the Schedule of Classes - Basic Data page. The system selects this check box by default on the Roster Generator Options page. If you clear this check box, the system generates attendance rosters for all scheduled classes matching your processing criteria, regardless of how the Generate Class Mtg Attendance check box is set on the Schedule of Classes - Basic Data page.

Sync Attendance with Class Meeting (synchronize attendance with class meeting)

When you run the attendance roster generator process, you can update all rosters within your parameters or update only those that have had meeting pattern changes since the original rosters were generated. To update changed rosters, select the Sync Attendance with Class Meeting check box. To update all rosters (even if a roster has had no changes), clear the Sync Attendance with Class Meeting check box.

Attendance Create/Update Flag

Use to specify the type of roster to generate for this sequence number. The system populates this field with the value specified on the Attendance Roster Generator page, but you may change it on a row-by-row basis. Values are:

Create Attendance: Select when you want to create new rosters or replace old ones.

Update Attendance/Active Only: Select when you want to add and delete students from the roster, based on their current enrollment statuses in the course for the specified group of attendance rosters. The add and drop date on the STDNT_ENRL table determines how rosters are updated. Select this option when a student drops the class and you want to remove the student and leave no attendance history.

Update Attendance/All Students: Select when you want to add, but *not* delete students from the specified group of rosters. Students who have dropped are set to inactive status by having the Present flag set to *Off*. The system adds new students to the rosters, but only marks these students as present for the class sessions that occur after the add date.

Printing Attendance Rosters

After you have generate rosters, click the Print button on the Class Attendance page to create and print the Class Attendance report as a PDF file.

See Also

[Chapter 40, "Tracking Attendance," Generating Individual Class Attendance Rosters, page 974](#)

Using Attendance Rosters

After you create your attendance rosters, you can access them to track student attendance. This section lists prerequisites and discusses how to:

- Track attendance by class.
- Track attendance by class meeting.
- Select a roster for a student.
- Track attendance by student.

You can indicate for each class meeting whether a particular student is present, tardy, or leaves early. You can even enter the reason. You can also enter the exact time that the student is in attendance, the contact minutes, and the attendance date. The system updates all three previously mentioned pages with the changes. If your institution collects data on paper, or if you prefer to track attendance on paper, you can print your attendance rosters and enter the data into the system later.

Prerequisites

Before you can record attendance, you must generate the attendance roster.

Pages Used to Record Attendance

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Attendance Roster By Class	CLASS_ATTENDANCE	Curriculum Management, Attendance Roster, Attendance Roster By Class, Attendance Roster By Class	Track student attendance by accessing attendance rosters for individual classes. For each class meeting, you can view, enter, update, and print the corresponding attendance roster. You can also generate attendance rosters for classes and class meetings.
Attendance Tracking By Template	ATTEND_TRACKING_1	Curriculum Management, Attendance Roster, Class Attendance By Template, Attendance Tracking By Template	View, enter, and change data on a class meeting basis.
Attendance Roster by Student	STDNT_ATTNDNCE1	Curriculum Management, Attendance Roster, Attendance Roster By Student, Attendance Roster by Student	Select a roster for a student.
Student Attendance Roster	STDNT_ATTND_SRCH	Click the Class Number link on the Attendance Roster by Student page.	Track an individual student's attendance in a class. You can view, enter, modify, and delete the student's existing attendance data. The student must be enrolled in the class or manually added to the attendance roster.

Tracking Attendance by Class

Access the Attendance Roster By Class page (Curriculum Management, Attendance Roster, Attendance Roster By Class, Attendance Roster By Class).

See Also

[Chapter 40, "Tracking Attendance," Generating Individual Class Attendance Rosters, page 974](#)

Tracking Attendance by Class Meeting

Access the Attendance Tracking By Template page (Curriculum Management, Attendance Roster, Class Attendance By Template, Attendance Tracking By Template).

Attendance Tracking By Template

Course ID:	003274	Surv Brit Lit	Institution:	PeopleSoft University
Subject:	ENGLIT	100	Term:	2003 Fall
Class Nbr:	1111	1 Lecture	Session:	Regular Academic Session

Template Nbr:	1	*Attendance From Time:	11:00AM
Attendance Type:	MTG Class Meeting	*Attendance To Time:	11:50AM
*Attendance Date:	08/27/2003	Contact Minutes:	50

Student Attendance Roster											Customize	Find	
	ID	Name	Present	Tardy	Left Early	Reason	From Time	To Time	Contact Minutes	Academic Career			
1	SR13582	Basile, Valerie	☒	☐	☐		11:00AM	11:50AM	50	Undergrad			
2	SR13566	Chavez, Angela	☒	☐	☐		11:00AM	11:50AM	50	Undergrad			

Attendance Tracking By Template page

Changes made here are immediately visible on the Class Attendance page and the Student Attendance page.

Template Number

The system displays the template number for the class meeting. The template number uniquely identifies each class meeting attendance roster.

Attendance Type

Indicates the attendance type for the class meeting, such as *Class Meeting*, *Conference*, *Field Trip*, *Instructor Consultation*, or *Study Group*. These attendance types determine which fields the system uses for your attendance roster. When you generate attendance rosters for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the class meeting attendance type value from the Academic Institution 3 page. If you want to use attendance type values other than the default, you can change the Attendance Type field value for an individual attendance roster template. When you exit the field, the system makes the change online and updates the roster fields in accordance with the options for this particular course component and attendance type, as set on the Components page. Values for this field are delivered with your system as translate values. You can modify these values. This is a required field.

To use attendance types, you must first define the attendance types and their associated fields for the course component on the Components page.

When you generate attendance rosters for all class meetings within a scheduled class (either by using the Class Attendance page or the Attendance Roster Generator page), the system assigns each attendance roster with the following four field values (based on the class meeting pattern of the class in the Schedule of Classes). When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must manually assign the following four field values:

Attendance Date

Indicates the date of the class meeting. You can change this value.

Attendance From Time	Designates the start time of the class meeting. This field appears on the class meeting attendance roster when you select the Use To and From Time check box for the attendance type on the Components page. You can change this value.
Attendance To Time	Designates the end time of the class meeting. This field appears on the class meeting attendance roster only when you select the Use To and From Time check box for the attendance type on the Components page. You can change this value.
Contact Minutes	Indicates the total length of the class meeting in minutes and is the difference between the to time and from time values. This field appears on the class meeting attendance roster when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.
IDandName	The system displays the ID and name of each student that is enrolled in the class when you generate attendance rosters and opt to have the system populate the roster from student enrollment. Otherwise, you can enter the IDs manually, and the system displays each student's name in the Name field after you exit the ID field. Insert rows to add to the class meeting attendance roster students who perhaps are not formally enrolled in the class; delete rows to remove students from the class meeting attendance roster. Adding rows does not enroll or drop students. This is for tracking nonenrolled students only.
Present	Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component when you select the Use Present check box for this class meeting's attendance type on the Components page.
Tardy	Select to indicate that the student arrived late to the class meeting. This field appears on the attendance rosters of this course component when you select the Use Tardy check box for this class meeting's attendance type on the Components page.
Left Early	Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component when you select the Use Left Early check box for this class meetings attendance type on the Components page.
Reason	Enter a reason to describe a student's presence, tardiness, or early departure. This field appears on the attendance rosters of this course component when you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.

From Time and To Time	Indicates the time that the student arrived and left the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from or to time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters. You can change the from and to time value to a time that falls only within the template's time range.
Contact Minutes	Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.
Attendance Date	Indicates the date on which the student attended the class meeting.
Academic Career	The system displays the academic career of the student. This is useful for tracking the types of students who enroll in a class, such as how many undergraduate students are in a class as compared to graduate students.
	Note. A student might appear twice on an attendance roster because enrollment is keyed by academic career. For instance, a student might enroll in a class twice, each time through a different academic career and would thus appear on the attendance record twice.

Selecting a Roster for a Student

Access the Attendance Roster by Student page (Curriculum Management, Attendance Roster, Attendance Roster By Student, Attendance Roster by Student).

Attendance Roster by Student

ID: SR13582 Basile,Valerie
Career: UGRD Undergraduate
Institution: PSUNV PeopleSoft University
Term: 0505 2003 Fall

Enrolled Classes				
			Customize Find 	First  1-6 of 6  Last
<u>Class Number</u>	<u>Class Title</u>	<u>Subject / Catalog#</u>	<u>Academic Career</u>	<u>Academic Institution</u>
1111	Surv Brit Lit	ENGLLIT 100	Undergraduate	PeopleSoft University
1112	Surv Am Lit	ENGLLIT 102	Undergraduate	PeopleSoft University
1683	Psychology Special Topics	PSYCH 495	Undergraduate	PeopleSoft University
1684	Psychology Special Topics	PSYCH 495	Undergraduate	PeopleSoft University
1796	Perspectives on the Present	HISTORY 100	Undergraduate	PeopleSoft University
1809	Ethics	PHILO 240	Undergraduate	PeopleSoft University

Attendance Roster by Student page

Click the class number to access the Student Attendance Roster page for that class section.

Tracking Attendance by Student

Access the Student Attendance Roster page (click the Class Number link on the Attendance Roster by Student page).

Student Attendance Roster

Valerie Basile
SR13582

Term: 2003 Fall
Career: Undergraduate
Institution: PeopleSoft University

Class Nbr: 1111
Surv Brit Lit

Section: 1

Catalog Number: ENGLLIT 100

Component: Lecture

Academic Group: College of Liberal Arts

Session: Regular 1

Status/ Reason: Enrolled / Enrolled

Status Date: 07/23/2004

Attendance Date	Type	Description	Present	Tardy	Left Early	Reason	From Time	To Time	Contact Minutes	Template Nbr
08/27/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	1
08/29/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	2
09/03/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	3
09/05/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	4
09/08/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	5
09/10/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	6
09/12/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	7
09/15/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	8
09/17/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	9
09/19/2003	MTG	Class Meeting	☒	☐	☐		11:00AM	11:50AM	50	10

Student Attendance Roster page

Attendance Date

Indicates the date on which the student attended the class meeting. This field appears on attendance rosters of this course component only when you select the Override Template Date/Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can edit the Attendance Date field value. Otherwise, the attendance date for the template defines the value for the Attendance Date field on the attendance rosters.

Type

Indicates the attendance type for the class meeting, such as *Class Meeting*, *Conference*, *Field Trip*, *Instructor Consultation*, or *Study Group*. These attendance types determine which fields the system uses for your attendance roster. When you generate attendance rosters for all class meetings by using the Attendance Roster Generator page or the Class Attendance page, the system populates all attendance rosters with the class meeting attendance type value from the Academic Institution 3 page. If you want to use attendance type values other than your institution's attendance type value, you can change the attendance Type field value for an individual student. When you exit the field, the system makes the change and updates the fields that appear on the roster according to the selected options for this particular course component and attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values.

To use attendance types, define the attendance types and their associated fields for the course component on the Course Component Attendance page.

Description	Describes the attendance type value, such as <i>Class Meeting</i> , <i>Conference</i> , <i>Field Trip</i> , <i>Instructor Consultation</i> , or <i>Study Group</i> .
Present	Select to indicate that the student attended the class meeting. This field appears on the attendance rosters of this course component when you select the Use Present check box for this class meeting's attendance type on the Components page.
Tardy	Select to indicate that the student was late to the class meeting. This field appears on the attendance rosters of this course component when you select the Use Tardy check box for this class meeting's attendance type on the Components page.
Left Early	Select to indicate that the student left the class meeting before its scheduled end time. This field appears on the attendance rosters of this course component when you select the Use Left Early check box for this class meeting's attendance type on the Components page.
Reason	Enter a reason to describe a student's presence, tardiness, or early departure. This field appears on the attendance rosters of this course component when you select the Use Reason check box for this class meeting's attendance type on the Components page. Values for this field are delivered with your system as translate values. You can modify these values. The system displays the from time, to time, and contact minutes for the class meeting. When you generate attendance rosters for all class meetings within a scheduled class, either by using the Class Attendance page or the Attendance Roster Generator page, the system assigns each attendance roster these three values based on the class meeting pattern of the class in the schedule of classes. When you generate attendance rosters for individual class meetings (by using the Class Attendance page on a new row), you must manually assign these values.
From Time	Indicates the time that the student arrived at the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the from time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the template define the parameters of the From Time and To Time fields on the attendance rosters, and you can only change the from time to a value that falls within the template's time range.
To Time	Indicates the time that the student left the class meeting. This field appears on attendance rosters of this course component when you select the Use To and From Time check box for the attendance type on the Components page. If you select the Override Template Date/Time check box on the Components page, you can change the to time value on a student-by-student basis. Otherwise, the From Time and To Time fields for the Template define the parameters of the From Time and To Time fields on the attendance rosters and you can only change the to time to a value that falls within the template's time range.

Contact Minutes

Indicates the student's total minutes in attendance. This field appears on attendance rosters of this course component when you select the Use Contact Minutes check box for the attendance type on the Components page. You can change this value.

Template Number

The system displays the template number for the class meeting. The template number uniquely identifies each class meeting attendance roster.

Chapter 41

Tracking Student Data

Using Student Records, you can track, use, and view non-course-related student data.

This chapter lists common elements and discusses how to:

- Track academic standing.
- Track honors and awards.
- Track special grade point averages.
- Track milestones.
- Track extracurricular activities.
- Track student groups.
- Track student attributes.
- Use Student Records service impacts.
- Assign academic advisors to students.
- View advisors through self service.
- View advisee information through self service.
- View student careers.
- View comments, checklists, and communications.
- View student photos.

Common Element Used in This Chapter

Tran Level (transcript level)	Select the transcript level on which you want the given data to print. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are <i>Degr Prog</i> (degree progress), <i>Not Print</i> , <i>Official</i> , <i>Stdnt Life</i> (student life), and <i>Unofficial</i> .

See Also

[Chapter 14, "Setting Up Transcripts," Understanding Transcript Levels, page 311](#)

Tracking Academic Standing

This section discusses how to:

- Assign academic standing in batch.
- Track academic standing for individual students.

Pages Used to Track Academic Standing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Standing/Honors Awards	RUNCTL_SR_ASHA	Records and Enrollment, Term Processing, End of Term Processing, Acad Standing/Honors & Awards, Academic Standing/Honors Awards	Enter parameters for and run the Academic Standing/Honors Awards process (SRPCEASD). The process evaluates students using the rules defined on the Academic Standing Rule page, assigning academic standing to students that pass the rule parameters.
Academic Standing	ACAD_STDNG_ACTN	Records and Enrollment, Student Term Information, Term History, Academic Standing	Track student academic standing. The Academic Standing process populates this page according to the rules you defined on the Academic Standing Rules page. You can also manually enter information on this page.

Assigning Academic Standing in Batch

Access the Academic Standing/Honors and Awards page (Records and Enrollment, Term Processing, End of Term Processing, Acad Standing/Honors & Awards, Academic Standing/Honors Awards).

Academic Standing/Honors and Awards							
Run Control ID: PS		Report Manager		Process Monitor		Run	
*Institution	*Career	*Term	Acad Program	Calculate Academic Standing	Calculate Honors & Awards	*Date	
PSUNV	UGRD	0505	LAU	☒	☐	09/29/2004	+ -
PSUNV	UGRD	0505	FAU	☒	☐	09/29/2004	+ -

Academic Standing/Honors and Awards page

The Acad Standing/Honors Awards (academic standing/honors awards) COBOL SQL process (SRPCEASD) evaluates students who are active in the academic institution, academic career, term, and academic program that you select. If students meet the parameters of the academic standing rule or honor award rule, the process updates these students' academic standing records or honors and awards records according to the rule. The process does not update students' academic standing for grades that do not count towards GPA, such as pass/no pass grades.

- Institution** Select the academic institution that you want the system to use in the Academic Standing process.
- Career** Select the academic career that you want the system to use in the Academic Standing process.
- Term** Select the term that you want the system to use in the Academic Standing process.
- Acad Prog**(academic program) Select the academic program that you want the system to use in the Academic Standing process.
- Calculate Academic Standing** Select to calculate academic standing.
- Calculate Honors & Awards** Select to calculate honors and awards. You can select both check boxes at the same time.
- Date** Enter the date that you want the system to use in the Academic Standing process. The Academic Standing process displays the date that you enter here in the Date Received field on the Academic Standing page.

See Also

[Chapter 41, "Tracking Student Data," Tracking Honors and Awards, page 1001](#)

Tracking Academic Standing for Individual Students

Access the Academic Standing page (Records and Enrollment, Student Term Information, Term History, Academic Standing).

Term Statistics

Cumulative Statistics

Term Withdrawal

Session Withdrawal

Academic Standing

Dalelia Beer

SR0402

Find | View All

First

1 of 2

Last

Academic Career:

Graduate

Find | View All

First

1 of 1

Last

Term:

2001 Fall

PeopleSoft University

Find | View All

First

1 of 1

Last

*Effective Date:

08/27/2001

Effective Sequence:

0

Manual Override

☒

+

-

Academic Program:

GLAU

Graduate Liberal Arts Programs

Academic Standing Action:

Formal Description:

Internal Description:

Academic Standing Status:

User ID:

Action Date: 08/27/2001

Academic Standing page

Effective Sequence	When manually entering academic standing, the default for the first academic standing action within a student's academic career and term is 0. If multiple academic standing actions exist within the same academic career and term, you must override the default value by manually incrementing the effective sequence for each additional academic standing action entered for the same effective date. When the Academic Standing process populates this field, it enters effective sequences starting at ten and increments them by ten (such as 10, 20, and 30) when the effective date is the same as an existing row.
Manual Override	Select to indicate that you entered the information on this page manually. Note. When you run the Academic Standing process, the system does not calculate academic standing for any records in which this check box is selected.
Academic Standing Action	Select an academic standing action.
Academic Program	Select the academic program of the student. The system prompts you for student's record.
Formal Description, Internal Description, and Academic Standing Status	The system displays these values according to corresponding values on the Academic Standing Table page.

Tracking Honors and Awards

This section discusses how to:

- Assign honors and awards in batch.
- Track honors and awards for individual students.

Pages Used to Track Honors and Awards

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Standing/Honors and Awards	RUNCTL_SR_ASHA	Records and Enrollment, Term Processing, End of Term Processing, Acad Standing/Honors & Awards, Academic Standing/Honors and Awards	Enter parameters for and run the Academic Standing/Honors Awards process (SRPCEASD). The process evaluates students using the rules defined on the Honors and Awards Rule page, assigning honors and awards to students that pass the rule parameters.
Honors and Awards	HONORS_AWARDS_CS	Records and Enrollment, Graduation, Honors and Awards, Honors and Awards	Track student honors and awards. The Honors/Awards process populates the page according to the rules you set on the Honors/Awards Rule page. You can also manually enter information on this page.

Assigning Honors and Awards in Batch

Access the Academic Standing/Honors and Awards page (Records and Enrollment, Term Processing, End of Term Processing, Acad Standing/Honors & Awards, Academic Standing/Honors and Awards).

Use this to run the Academic Standing/Honors Awards process (SRPCEASD), which assigns honors and awards to students based on your run parameters and honor award rules.

See Also

Chapter 41, "Tracking Student Data," Tracking Academic Standing, page 998

Tracking Honors and Awards for Individual Students

Access the Honors and Awards page (Records and Enrollment, Graduation, Honors and Awards, Honors and Awards).

Honors and Awards

David Beckett SR0401

Honors/Awards Detail Find | View All First 1 of 1 Last

*Internal/External: Internal *Date Recvd: 09/30/2004

*Academic Institution: PeopleSoft University

Honor/Award: DEANLS Dean's List

Formal Description: Dean's List

Grantor:

Career: UGRD Undergrad Term: 0487 2003 Spr

Academic Program: LAU Lib Arts Tran Level: Official

Academic Plan: System Generated

Comment:

Honors and Awards page

Internal/External

Indicate whether the student's honor or award relates to an external organization or your internal institution. Your selection here affects the honors and awards that you can choose in the Honor/Award field. The system prompts you with the corresponding honors and awards that you defined on the Honor/Award Table page.

Date Recvd (date received)

Enter the date that the student received the honor or award.

Academic Institution

Select the academic institution for which you are entering the honor or award. Your selection here affects the honors and awards that you can choose in the Honor/Award field. The system prompts you with the corresponding honors and awards that you defined on the Honor/Award Table page for the academic institution that you select. Define academic institution values on the Academic Institution Table component.

Honor/Award

Select the honor and award code that you want to assign to a student's record.

Formal Description and Grantor	The system uses the honor and award code that you enter to populate the formal description and grantor of the honor or award. This information comes from the Honor/Award Table page.
Career	Enter the academic career for which the student is receiving the honor or award. The system prompts you with only the academic careers in which the student has been active.
Term	Enter the term for which the student is receiving the honor or award. The system prompts you with the terms in which the student has been active according to the academic career you select.
Academic Program	Enter the academic program for which the student is receiving the honor or award. The system prompts you with the student's academic programs according to the academic career.
Academic Plan	Enter the academic plan for which the student is receiving the honor or award. The system prompts you with the student's academic plans according to the academic career or program.
System Generated	The system selects this check box if the Honors/Awards process generated this honor and award.

Tracking Special Grade Point Averages

This section provides an overview of how to assign special grade point averages and discusses how to maintain a student's special grade point averages.

See Also

[Chapter 11, "Preparing to Track Student Data," Setting Up Special Grade Point Averages, page 277](#)

Understanding How to Assign Special Grade Point Averages

You can assign special grade point averages to students in three ways:

- If you have calculated students' grade point averages through the PeopleSoft Academic Advisement report process using the analysis database report option, your institution can design a process that populates the Student Special GPA page with the results of the calculation, storing them for future analysis.
- You can create and define your own calculation process through the process scheduler.
- You can directly input the special grade point average onto the Student Special GPA page, then use these averages for other applications within PeopleSoft Campus Solutions.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Using the Analysis Database to Create User Configurable Reports"

Page Used to Track Special Grade Point Averages

Page Name	Definition Name	Navigation	Usage
Student Special GPA	STDNT_SPCL_GPA	Records and Enrollment, Student Term Information, Term History, Student Special GPA	Assign types of grade point averages to a specific student's term record, indicating whether the student's special grade point average belongs to his or her academic program, academic plan, or academic subplan.

Maintaining a Student's Special Grade Point Averages

Access the Student Special GPA page (Records and Enrollment, Student Term Information, Term History, Student Special GPA).

David Beckett SR0401

Find | View All First 3 of 3 Last

Academic Career: Undergraduate

Find | View All First 1 of 8 Last

Term: 2003 Spring PeopleSoft University

Find | View All First 1 of 1 Last

*GPA Type: PRGM Program GPA Sequence: 1

*GPA: 2.890 ☒ Entered Online

Academic Program: LAU Liberal Arts Undergraduate

Academic Plan: PSYCH Psychology

Academic Sub-Plan:

User ID: PS Locherty, Betty Action Date: 09/30/2004

Student Special GPA page

GPA Type (grade point average type)

Select the grade point average type for the grade point average that you want to enter.

Sequence	The sequence number default is 1. The system increases the number sequentially by one as you add new rows. The system evaluates special grade point average numbers in sequence.
GPA (grade point average)	The default grade point average is 0.000. Enter the student's special grade point average. No programming is tied to this field in the delivered application. Any reporting you choose to perform based on the value entered here must be programmed by your institution.
Entered Online	Select to distinguish this special grade point average from those populated by a configured background process. This flag has no programming tied to it, but you can use it for reporting purposes.
Academic Program	(Optional) Select the student's academic program for which you are creating the special grade point average. The list box displays the student's active academic programs.
Academic Plan	(Optional) Select the student's academic plan for which you are creating the special grade point average. The list box displays the student's active academic plans.
Academic Sub-Plan	(Optional) Select the student's academic subplan for which you are creating the special grade point average. The list box displays the student's active academic subplans.

Tracking Milestones

Milestones are non-course-related events that a student must fulfill for a degree. They include things such as language requirements, qualifying and oral examinations, thesis, and dissertation. Use the Student Milestones component to assign milestones and advisors, as well as to record completions of milestones and attempts to fulfill them.

This section discusses how to:

- Assign milestones to students.
- Create milestones from templates.
- Assign committees and advisors to students completing milestones.
- Record milestone attempts.

See Also

Chapter 11, "Preparing to Track Student Data," Setting Up Milestones, page 278

Pages Used to Track Milestones

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Milestones	STUDENT_MILESTONE1	Records and Enrollment, Enroll Students, Student Milestones, Student Milestones	Assign milestones to a student.
Create Student Milestones	STDNT_MLSTN_COPY	Click the Milestone Copy button on the Student Milestone page.	Create milestones from templates by copying milestone information from the milestone template to the student's transcript.
Advisors/Completion Info (advisors/completion information)	STUDENT_MILESTONE3	Records and Enrollment, Enroll Students, Student Milestones, Advisors/Completion Info	Assign either advisors or a committee to students completing the milestone, and record the milestone completion date. Each milestone can have a different advisor.
Milestone Attempts	STUDENT_MILESTONE4	Records and Enrollment, Enroll Students, Student Milestones, Milestone Attempts	Record grading information and milestone attempted information.

Assigning Milestones to Students

Access the Student Milestones page (Records and Enrollment, Enroll Students, Student Milestones, Student Milestones).

Student Milestones | Advisors/Completion Info | Milestone Attempts

Eric Choi AA0005

Institution: PeopleSoft University Acad Prog: Liberal Arts Undergraduate Career: Undergraduate

Find | View All First 1 of 1 Last

*Effective Date: 09/01/1997 Milestone Copy

Milestone Detail Find | View All First 1 of 1 Last

*Milestone Nbr: 10 *Milestone: WRITING

Academic Plan: ENGL-BA English (BA)

Description: Writing Portfolio

Formal Description: Writing Portfolio

Milestone Level: UNDERGRADUATE Attempts Allowed: 2

Milestone Title: Writing Portfolio

Student Milestones page

Milestone Nbr (milestone number)	The milestone number default is 10. As you insert rows, the system increments this number sequentially. The milestone number is used for sequencing.
Milestone	Select the milestone.
Academic Plan	Select the academic plan to which the milestone is attached. The system prompts you from the student's academic record.
Milestone Level	Select the milestone level. Some milestones, such as Comprehensive Exams, can have multiple levels. You can override this value.
Attempts Allowed	The system populates the attempts allowed from the Milestone Table page. You can override this value.
Milestone Title	Enter a title for the milestone. You can print the title on the student's transcript.
Milestone Copy	Click to copy milestone information from the milestone template to the student's record.

Creating Milestones from Templates

Access the Create Student Milestones page (click the Milestone Copy button on the Student Milestone page).

Create Student Milestones

Create Milestones From Templates

☒ Career Milestones

☒ Program Milestones

Plan One Milestones:

ENGL-BA

English (BA)

Plan Two Milestone:

Create Student Milestones page

Career Milestones	Select to choose a milestone that is within the student's academic career. The system transfers the information from the template to the Student Milestone page.
Program Milestones	Select to choose a milestone that is within the student's academic program. The system transfers the information from the template to the Student Milestone page.
Plan One Milestones and Plan Two Milestones	Select plan one and/or plan two milestones to choose a milestone that is within the student's academic plan. The system transfers the information from the template to the Student Milestone page.

Assigning Committees and Advisors to Students Completing Milestones

Access the Advisors/Completion Info page (Records and Enrollment, Enroll Students, Student Milestones, Advisors/Completion Info).

Student Milestones		Advisors/Completion Info		Milestone Attempts	
Eric Choi		AA0005			
Institution: PeopleSoft University		Acad Prog: Liberal Arts Undergraduate		Career: Undergraduate	
Find View All First 1 of 1 Last					
Effective Date:		09/01/1997			
Advisors Find View All First 1 of 1 Last					
Milestone:	WRITING		Writing Portfolio		+ -
*Transcript Level:	Degr Prog		*Print Milestone Detail:	Always	
☐ Advised by Committee					
Advisor/Evaluator 1:					
Advisor/Evaluator 2:					
Comment:	Portfolio passed due to Other Credit posted. Credit for Englcomp 555 and 556.				
Completion Information Find View All First 1 of 1 Last					
Milestone:	WRITING		Writing Portfolio		+ -
Term Required:					
Date Required:					
Anticipated Term:					
Anticipated Date:					
Milestone Complete:	Completed		Attempts Allowed:	2	
How Completed:	Submitted Work		Date Completed:	07/01/1997	

Advisors/Completion Info page

Print Milestone Detail

Indicates when the milestone will print on the transcript. The system transfers this value from the Milestone Template page. You can override this value. Values for this field are delivered with your system as translate values. The delivered values are *Always*, *Never*, and *Satisfied*.

Advised by Committee

Select to assign an advisory committee to the student. When you select this check box the Committee field appears.

Committee

Select a committee. This field appears when you select the Advised by Committee check box.

**Advisor/Evaluator 1 and
Advisor/Evaluator 2**

If you do not select the Advised by Committee check box, select individual advisors for the student. The system prompts you with advisors that are within the student's academic career and academic program.

Term Required

Select the term by which the milestone must be completed.

Date Required

The system populates this date based on the term required value on the Term Table page. You can override this date.

Anticipated Term	Select the term by which you anticipate the student will complete the milestone.
Anticipated Date	The system populates this date based on the anticipated term value and the Term Table page. You can override this date.
Milestone Complete	The system displays the milestone complete status according to the values entered on the Milestone Attempts page.
Attempts Allowed	The system displays the attempts allowed according to the values entered on the Milestone Template page. You can override this value.

Recording Milestone Attempts

Access the Milestone Attempts page (Records and Enrollment, Enroll Students, Student Milestones, Milestone Attempts).

Student Milestones

Advisors/Completion Info

Milestone Attempts

Eric Choi

AA0005

Institution: PeopleSoft University

Acad Prog: Liberal Arts Undergraduate

Career: Undergraduate

Find | View All

First

1 of 1

Last

Effective Date:

09/01/1997

Find | View All

First

1 of 1

Last

Milestone:

WRITING

Writing Portfolio

Find | View All

First

1 of 1

Last

Attempt Nbr:

1

How Attempted:

Submitted Work

Date Attempted:

07/01/1997

Grading Scheme:

UGD

Undergraduate Grading Scheme

Grading Basis:

PNP

Pass/Not Pass

*Milestone Complete:

Completed

Grade Input:

P

Pass

Milestone Attempts page

Attempt Nbr (attempt number)	Enter the number of the student's attempt at this milestone.
How Attempted	Select how the milestone was attempted. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are <i>Attended Seminar</i> , <i>Exam Taken</i> , <i>Filed Petition</i> , <i>Native Speaker</i> , and <i>Submitted Work</i> .
Date Attempted	Enter the date that the student attempted the milestone.

Grading Scheme and Grading Basis

The system populates the grading scheme and grading basis from the Milestone Template page. You can override these values.

Milestone Complete

Select the status of the milestone. Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are *Completed*, *In Progress*, and *Not Completed*.

Grade Input

Enter a grade (if required by the grading scheme and grading basis).

Tracking Extracurricular Activities

This section discusses how to record and track an individual's extracurricular activities.

See Also

[Chapter 11, "Preparing to Track Student Data," Setting Up Extracurricular Activities, page 281](#)

Page Used to Track Extracurricular Activities

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Extracurricular Activities	STDNT_EXTRA_ACTVTY	Records and Enrollment, Student Background Information, Extracurricular Activity, Extracurricular Activities	Record and track an individual's extracurricular activities. This page is shared with PeopleSoft Recruiting and Admissions and Campus Community.

Tracking an Individual's Extracurricular Activities

Access the Extracurricular Activities page (Records and Enrollment, Student Background Information, Extracurricular Activity, Extracurricular Activities).

Extracurricular Activities

Mike Murano FA0890

Activity Detail

Find | View All First 1 of 1 Last

Internal / External: Internal + -

Activity: A07 *Description: Crew

Start Date: 08/27/2003 **End Date:** 12/16/2003 ☐ Interest

Years Involved
☐ Ninth Grade ☐ Eleventh Grade ☐ Postsecondary
☐ Tenth Grade ☐ Twelfth Grade

Academic Institution: PeopleSoft University

Academic Career: UGRD Undergrad **Term:** 0505 2003 Fall

Activity Type: Athletics **Office Held:**

Time Involvement

Time Unit 1: 10 ***Time Unit:** Hrs/Week

Time Unit 2: ***Time Unit:** Wks/Year

Comments:

Extracurricular Activities page

Activity	Select an extracurricular activity.
Start Date	The default for the start date is your system date.
End Date	Enter the date that the activity ended.
Academic Institution and Academic Career	The system populates the academic institution and academic career of the student, unless the student has more than one academic career or institution on their record. In that case, you can select the appropriate academic institution and academic career.
Term	Select the academic term in which the activity took place.
Activity Type	The system populates the activity type if it was defined on the Extracurricular Activity Table page. You can change this value.
Office Held	Select the office that the person held (if applicable). Values for this field are delivered with your system as translate values. You can modify these values. The delivered values are <i>Captain</i> , <i>EIC</i> , <i>President</i> , <i>Treasurer</i> , and <i>Vice Pres</i> (vice president).

Time Unit 1 and Time Unit 2 Enter the amount of time the student spent participating in this activity. Time units can represent hours per week, hours per month, and so on. Select the time unit qualifier in the field next to this one. Values for this field are delivered with your system as translate values. You can modify these values.

Additional Info (additional information) Enter any comments or notes about the student's participation in this extracurricular activity.

Tracking Student Groups

This section lists the page used to track student groups.

See Also

[Chapter 11, "Preparing to Track Student Data," Managing Student Groups, page 283](#)

Page Used to Track Student Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Groups	STDNT_GROUPS	Records and Enrollment, Career and Program Information, Student Groups, Student Groups	Track student membership in various groups for reporting, fee calculation, or degree progress assessment. You track groups within an academic institution, so students of any program or career can be associated with the same group.

Tracking Student Attributes

This section discusses how to track student attributes.

See Also

[Chapter 11, "Preparing to Track Student Data," Setting Up Student Attributes, page 283](#)

Page Used to Track Student Attributes

Page Name	Definition Name	Navigation	Usage
Student Attributes	STDNT_ATTRIBUTES	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Attributes	Track student attributes and values for students.

Tracking Student Attributes

Access the Student Attributes page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Attributes).

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees	AJS Student Program
David Beckett		SR0401			
Academic Career:		Undergraduate	Student Career Nbr: 0	Career Req. Term	
Find View All First 1 of 1 Last					
Status:		Active in Program	Admit Term:	1998 Fall	
Effective Date:		01/01/1998	Effective Sequence:	0	
Program Action:		Activate	Action Date:	07/25/1998	
Action Reason:			Requirement Term:	1998 Fall	
Academic Program:		Lib Arts			
Find View All First 1-3 of 3 Last					
*Student Attribute	*Student Attribute Value	Primacy			
CHRT Cohort	FALL1998 Fall 1998	10	+ -		
CHRT Cohort	FALL1999 Fall 1999	20	+ -		
CHRT Cohort	FALL2000 Fall 2000	30	+ -		

Student Attributes page

Student Attribute

Select the student attribute that you want to attach to the student for cohort tracking and reporting purposes.

The Consolidate Academic Statistics process compares this student attribute to the value existing in the Student Attribute for Cohort field on the Academic Institution 3 page. If the process finds a match, it writes this student attribute to the student's academic statistics record.

Student Attribute Value

Select the student attribute value associated with the student attribute.

Primacy

Enter the primacy number for this student attribute. If you enter the same student attribute more than once, the Consolidate Academic Statistics process writes the one with the lowest primacy number to the student's consolidated statistics record. This primacy number has no relation to financial aid primacy.

See Also

Chapter 46, "Consolidating and Reporting Academic Statistics," page 1157

Using Student Records Service Impacts

Use service indicators to provide or limit access to services in your system. Service indicators can be holds to prevent an individual from receiving certain services or positive indicators to designate special services to be provided. Service indicators consist of one or more service impact values identifying the types of specific services that are restricted or provided.

Student Records enables you to attach specific service impacts to negative service indicators, which, when assigned to a student, restricts the student from receiving certain services. These specific service impacts are the following:

CENR	Restricts <i>all</i> enrollment activity (such as adds, drops, swaps, or wait lists) for a student with existing enrollment for the current term.
IENR	Prevents a student from initially enrolling into a class but permits the student to add or drop classes if they already have enrollment activity for the current term.
AENR	Prevents a student from initially enrolling into a class <i>and</i> prevents the student from adding a class, <i>but</i> permits the student to drop classes if they have already have enrollment activity for the current term.
ENVER	Prevents the enrollment verification process from printing a student's enrollment verification request.
GRADE	Restricts a student's access to self-service View My Grades. Also prevents the student grade report process from printing the student's grade report.
DENR	Prevents a student from dropping or swapping a class but permits the student to add classes or make changes to existing enrollments.
WENR	Prevents all enrollment activity other than drops that result from the Student Records withdrawal process or the Student Financials cancellation process.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators"

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Service Indicators"

Assigning Academic Advisors to Students

This section discusses how to assign academic advisors to students.

When the message catalog message set number 14600, message numbers 877 & 878 message severity is set to Warning, the user is able to assign academic advisors or committees to a student whose academic program and plan is inactive for the defined student advisor effective date. To prevent the assigning of an academic advisor or committee to a student whose academic program and plan is inactive, for the defined effective date, the message severity should be set to Error. You can also change the message text and explanation. For example, add the word Error in front of the message text.

The academic program plan look up for the Student Advisor displays the maximum effective dated value corresponding to the defined effective date on the Student Advisor page. When you enter or select an inactive maximum effective dated program or plan value, you receive a warning message, but you can successfully save the transaction. The academic program status appears on the Student Advisor page. For example, LOA.

Access the Look Up Academic Program page.

Look Up Academic Program

EmplID: SR12219
 Academic Institution: PSUNV
 Academic Career: Undergraduate
 Academic Program: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Academic Program	Description	Program Status
FAU	Fine Arts Undergraduate	Leave of Absence

Look Up Academic program

When the message catalog severity is set to Warning, the user is able to assign an advisor to a student in an inactive program. For example, in the search results of the Look Up Academic Program, the FAU program is listed as Leave of Absence for the January 15, 2001 effective date.

Access the Look Up Academic Plan page.

Look Up Academic Plan

EmplID: SR12219
Academic Institution: PSUNV
Academic Career: Undergraduate
Academic Program: FAU
Academic Plan: begins with
Description: begins with

[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Academic Plan	Description	Program Status
MUSIC	Music Performance (BFA)	Leave of Absence

Look Up Academic Plan page

In the search results of the Look Up Academic Program or Academic Plan, the program status appears. The results also display the maximum effective dated value corresponding to the defined effective date on the Student Advisor page. If the max effective dated program or plan value or status has changed, historical academic advisement rows will not be affected unless the user makes a change to the historical record. Users will not be able to assign and save program or plan values that are not the max effective dated value for the student advisor effective date. For example, if Mary St. James had an academic plan of ETHST-BA in January 1, 2001. Effective January 1, 2006, she had a change to the Honors plan. On the Student Advisor page, with an effective date of April 1, 2006, the user will receive an invalid value message upon entering ETHST-BA as the student's plan.

Page Used to Assign Academic Advisors to Students

Page Name	Definition Name	Navigation	Usage
Student Advisor	STDNT_ADVISOR	Records and Enrollment, Student Background Information, Student Advisor, Student Advisor	Assign individual advisors or a committee of advisors to a student. The student must be active in an academic career and an academic program.

Assigning Advisors to Students

Access the Student Advisor page (Records and Enrollment, Student Background Information, Student Advisor, Student Advisor).

Student Advisor

John Sayre SR12219

Find | View All First 1 of 1 Last

*Academic Institution: PSUNV PeopleSoft University

*Effective Date: 15/01/2001

*Advisor Role: Advisor *Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: Fine Arts Undergraduate Status: LOA

Academic Plan: Music Performance (BFA)

Academic Advisor: Litman, Edward

Committee:

☐ Advised by Committee ☐ Must Approve Enrollment

☐ Must Approve Graduation ☐ Graduation Approved

Student Advisor page

Academic Institution	Select the academic institution for which you want to assign the student an academic advisor.
Effective Date	Enter the date that the student's advisor or advisory committee becomes effective for the student.
Advisor Role	Select the role that the advisor serves for the student. Values for this field are delivered with your system as translate values. You can modify these values.
Advisor Number	The system, by default, sets the number of the advisor to 1, and it increases the number by one as you add new advisors or committees.
Academic Career	Select the student's academic career for which you want to assign the advisor. The system prompts you with options based on the student's career term record.
Academic Program	Select the student's program for which you want to assign the advisor. The system prompts you with options based on the student's program record.
Academic Plan	Select the student's plan for which you want to assign the advisor. The system prompts you with options based on the student's program record.
Academic Advisor	If an individual advises a student, select that individual advisor. The system prompts you with advisors that are within the student's academic career and academic program. If this field is unavailable for entry, you must first clear the Advised by Committee check box.

Committee	If a committee rather than an individual advises a student, select the committee. If this field is unavailable for entry, you must first select the Advised by Committee check box.
Advised by Committee	If a committee rather than an individual advises a student, select this check box. The Committee field becomes available for entry, and the Academic Advisor field becomes unavailable for entry.
Must Approve Enrollment	Select to indicate that the advisor must approve a student's enrollment into classes. This check box is for information purposes only. No coding is behind it.
Must Approve Graduation	Select to indicate that the advisor or committee must make a degree check before your institution can complete the student's graduation process. The Graduation Approved check box becomes available for entry. Both check boxes are for information purposes only. No coding is behind them.
Graduation Approved	Select to indicate that the advisor or committee has made a degree check and your institution can now complete the student's graduation process. This check box is available for entry only when you select the Must Approve Graduation check box.

Viewing Advisors Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your students can view their advisors directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Academic Advisement Self Service," Pages Used to View Advisee Information Through Self-Service

Viewing Advisee Information Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, advisors can view an advisee's roster, view an advisee's academic program information, and view a new/drop-in advisee's roster directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Academic Advisement Self Service"

Viewing Student Careers

This section lists the page used to view student careers.

Page Used to View Student Careers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Career	STDNT_CAREER	Records and Enrollment, Career and Program Information, Student Career, Student Career	View a summary of academic career information for an individual student.

Viewing Comments, Checklists, and Communications

You can create comments, checklists, and communications for students. This section discusses comments, checklists, and communications only briefly here. However, this functionality is discussed more fully in the *PeopleSoft Campus Community 9.0 PeopleBook*.

- Use the Comment Summary page to view comments created for a student.
- Use the Communication Summary page to view a communication summary for a student.
- Use the Checklist Summary page to view checklist summary information for a student.
- Use the Operator 3C Groups Summary page to view and modify user inquiry groups.

Viewing Student Photos

This section lists the page used to view student photos.

Page Used to View Student Photos

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Photograph	EMPLOYEE_PHOTO	Records and Enrollment, Student Background Information, Photo, Photograph	View student photos.

Chapter 42

Managing Interoperability for LMSs

This chapter provides overviews of the learning management system (LMS) interoperability batch extract, the integration with LMS self-service authentication, and LMS setup and discusses how to:

- Set up LMS values and default options.
- Run the LMS Batch Extract process.
- Using self-service pages and LMS authentication.

Understanding the LMS Interoperability Batch Extract

The goal of an LMS is to use a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments. Based on instructional management systems (IMS) enterprise system specifications, currently PeopleSoft LMS interoperability batch extract supports one-way file transfer between PeopleSoft Campus Solutions and an external learning management system.

PeopleSoft LMS extract enables institutions to provide a third-party LMS (such as Blackboard CourseInfo) with personal profile data for learners and instructors, enrollment data and maintenance, and limited course scheduling data and maintenance. The LMS batch extract also provides basic integration with PeopleSoft Student Portal. Depending on your extract target, you can format LMS data with a unique file type of XML V1.1, Blackboard CourseInfo 4, or API Input (a WebCT format currently being phased out). WebCT Campus Edition Institutional (version 4.1) and WebCT Vista 2.1 both support XML V1.1

Currently, the feature does not support passing data or information back to PeopleSoft Campus Solutions from another LMS environment; nor does it include a real-time transactional messaging interface based on event processing.

PeopleSoft LMS batch extract supports IMS Enterprise Specification V1.1 XML data binding specifications. It also supports a simple, common, delimited option for API Input format.

File selection criteria are available at runtime for you to specify which type of files to pass. In addition, you can use packaging options to indicate how you want the system to organize the extract files.

The PeopleSoft LMS interoperability extract includes the following extract functions:

- Administrative (properties object) data that describes the contents of an extract file.
- Personal (person object) data about students and instructors that are associated with the LMS classes included in the extract.

- High-level class (group object) data describing each LMS class that is included in the extract.

This includes group term information and group course information.

- Student enrollment and instructor (group membership object) data for each LMS class.

The group is the LMS class and the membership includes the students and instructors that are associated with the LMS class.

High-level definitions for each of these data are provided in the following sections.

Properties Object Data

The properties object data serves as a file header and contains descriptive data about the contents of the file.

Person Object Data

Person object data includes:

- The person source ID wherein 1) the source is the academic institution with which the student or instructor is associated, and 2) the ID is either the individual's employee ID or user ID, depending on which is specified on the Academic Institution 3 page.
- The user ID, which is either the employee ID or user ID, depending on which is specified on the Academic Institution 3 page, of the student or instructor.
- Personal data for all students enrolled or previously enrolled in the selected LMS classes and the instructors teaching the classes.

Group Object Data - Term Information

Group object data - term information includes:

- The source ID wherein 1) the source is the description of the academic institution in which the classes are scheduled, and 2) the ID is the term code.
- The term description information and the term start and end dates.

Group Object Data - Course Information

Group object data - course information includes the source ID, wherein 1) the source is the description of the academic institution in which the class is scheduled, and 2) the ID is a unique identifier for the group. The group identifies the LMS class, which, by default, is TERM-INSTITUTION-SUBJECT-CATALOG NBR-SEC#-CLASS NBR

The ID includes the term code and class number added to the autogenerated LMS extract group ID from the LMS Data page in the schedule of classes.

Group Membership Object Data - Group

Group membership object data - group includes the source ID, which is the same as the source ID for group object data - course information.

Group Membership Object Data - Member

Group membership object data - member includes:

- The source ID, which is the same as the person source ID for person object data.
- The ID type for person or group.
- The role and, for instructors, the subrole, if any.
- The user ID (same as the person user ID for person object data).
- The class start and end dates.
- The enrollment status reason.
- For students only, a mode (grading basis) and result final grade.
- The student's preferred email address, or campus or home email address.
- The datasource, which is set on the run control page.

Understanding Integration with LMS Self-Service User Authentication

PeopleSoft LMS interoperability also provides single sign on authentication within PeopleSoft Campus Self Service, enabling students and instructors to access their learning management system home page and academic content for their LMS classes without having to sign on to the LMS website.

PeopleSoft LMS authentication uses the IMS enterprise system specifications to create a batch XML V1.1 extract file that is imported into the external LMS database. The XML V1.1 LMS extract file type is designated within the schedule of classes and autogenerates an LMS extract group ID that the system supplements with a term code and the class number to create a unique class identifier.

The LMS authentication passes user ID information and, as required, the unique class identifier to the LMS website. The user is authenticated and taken to the designated page within the LMS website, either the user's home page or the academic content for a specific class.

Note. Currently, WebCT Vista 2.1 and WebCT Campus Edition Institutional (version 4.1) are the only external learning management systems using the LMS authentication feature. Prior versions of WebCT are not supported. To determine whether support for other LMS applications has been added since this publication, please contact your PeopleSoft GSC representative.

See Also

Configuring Self-Service User Authentication for Your Learning Management System Website, which is posted to My Oracle Support.

Understanding LMS Setup

As you prepare to set up the LMS batch extract feature, consider the following questions:

- What type of batch extract file does your LMS vendor use: XML V1.1 (required for PeopleSoft LMS authentication), Blackboard CourseInfo 4.0, or the API Input format (a WebCT format currently being phased out)?
- If personal data is something that you need to extract, what phone type and address usage do you want to extract for the person objects?

Note. If you use the Blackboard CourseInfo extract file type, all persons whom you extract must have electronic addresses in the system.

- Will all of your classes need to be available for extract to an LMS system?

Each LMS extract file type presents slightly different extract processing requirements. Before you use the LMS Batch Extract component, familiarize yourself with the requirements of the file type that you plan to use.

All of the extract file types use *Update* and *Snapshot* extract modes.

Blackboard CourseInfo 4 creates delimited files that are uploaded through a batch utility in the Blackboard system. Students must have email addresses (preferred, home, or campus) for your PeopleSoft Campus Solutions system to extract and include the student in the people object.

The API Input format creates delimited files that are uploaded in the WebCT system through the use of an API.

Note. The API Input format is currently being phased out. However, the WebCT Campus Edition and Vista formats both support the XML V1.1 LMS extract file type that is required for the PeopleSoft system.

The following table further describes the requirements:

Item	Enterprise XML V1.1	Blackboard CourseInfo 4	API Input
Extract File Creation Methods	• Individually. • In combination with other files. • Combined in a single file.	• Individually. • In combination with other files.	• Individually. • In combination with other files. Note. You cannot select global files to run individually. They are run automatically every time the student file is selected. This is necessary because the global API has two formats: <i>FileAdd</i> and <i>FileUpdate</i>.

Item	Enterprise XML V1.1	Blackboard CourseInfo 4	API Input
Object Output Files	People • <i>Update:</i> All students and instructors who are members of the classes that meet the runtime criteria. • <i>Snapshot:</i> All students and instructors who are members of the classes that meet the runtime criteria.	User • <i>Update:</i> All active students in classes that meet the runtime criteria. • <i>Snapshot:</i> All active students in classes that meet the runtime criteria.	Student (the files are loaded through an API in which the course ID is specified on the command line; therefore, one file is created per class.) • <i>Update:</i> Only active students in classes that meet the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime new students. • <i>Snapshot:</i> All active students in classes that meet the runtime criteria.
	Group • <i>Update:</i> Only classes with no extract datetime that meet the runtime criteria and all classes that are designated as combined sections. • <i>Snapshot:</i> All classes that meet the runtime criteria.	Course • <i>Update:</i> Only classes with no extract datetime that meet the runtime criteria. • <i>Snapshot:</i> All classes the meet the runtime criteria.	Class (The PeopleSoft system provides this file as informational because WebCT does not use an API to load classes.) • <i>Update:</i> Only classes with no extract datetime that meet the runtime criteria. • <i>Snapshot:</i> All classes that meet the runtime criteria.

Item	Enterprise XML V1.1	Blackboard CourseInfo 4	API Input
	Membership <i>Update:</i> All instructors of the classes that meet the runtime criteria. All students that meet the runtime criteria who have a STATUS_DT, ENROL_ADD_DT, GRADING_BASIS_DT, ENROL_DROP_DT, or GRADE_DT that is greater than or equal to the class enrollment extract datetime (for example, newly enrolled students or currently enrolled students with a meaningful change). <i>Snapshot:</i> All students and instructors of classes that meet the runtime criteria.	Populate Course <i>Update:</i> All instructors of the classes that meet the runtime criteria. Only active students in classes that meet the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime (for example, new students). <i>Snapshot:</i> All instructors and active students of the classes that meet the runtime criteria.	Global <i>Update:</i> <i>FileAdd format:</i> Only active students in classes that meet the runtime criteria who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime for all their classes. <i>FileUpdate format:</i> Students who have already passed through the extract process at least once before, but have at least one new class in the run. Active students are not included if their status date is less than the class enrollment extract datetime for all of their classes (for example, no new course list information is available to pass). Active students who are in more than one class, and who have a STATUS_DT that is greater than or equal to the class enrollment extract datetime for a class (for example, at least one new course is available to add to a student's list). <i>Snapshot FileAdd format only:</i> All active students in classes that meet the runtime criteria.

Note. Students who have dropped the reported class prior to the drop or retain date are not included in any update of the LMS extract. If you run a snapshot, then run an update prior to the drop or retain date. Any students dropped since the snapshot are not updated or deleted from the LMS because their enrollments have been deleted from PeopleSoft Campus Solutions. Plan your production refresh schedule with this in mind.

Setting Up LMS Values and Default Options

Now that you have considered the extract file type that you plan to use, you can set up values and options for PeopleSoft interoperability LMS batch extract and LMS authentication.

To set up LMS values and options:

1. If you plan to use the XML V1.1 extract file type, you must set up LMS datasource codes and descriptions, LMS target codes and descriptions, and LMS type codes and descriptions.

You must create a data source code and a description for every possible extract source (for example, Undergraduate School of Business Administration, or PeopleSoft University). You must consider how you want to name your extract source information, and whether you typically extract from one small department or school at a time or extract a large group of data for a term at a time.

You must create target codes and descriptions for all of your targets (for example, the PSUNV/LMS shared server, or the School of Law server). Also, you need to create codes and descriptions for all of the different types of extract processes that you may run. These naming conventions are used as part of each XML V1.1 extract and are useful tracking tools.

2. If you plan to use PeopleSoft LMS self-service user authentication, you must set up LMS authentication profiles.

Currently, WebCT is the only LMS that uses LMS authentication. If you plan to use the LMS single sign on authentication, you must assign the LMS extract file type of XML for the LMS classes on the Schedule of Classes - LMS Data page.

See *Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions*, which is posted to My Oracle Support.

3. If you plan to use PeopleSoft LMS self-service user authentication, you must set up LMS providers.

LMS providers are assigned to classes on the Schedule of Classes - LMS Data page and the Schedule New Course - LMS Data page in the Providers for Authentication field. LMS providers can also be assigned as default values on the Academic Institution 3 page and the Course Catalog - Components page.

4. (Optional) If you want to automatically include all newly scheduled classes in a particular LMS extract file type, you can specify the desired LMS extract file type on the Academic Institution 3 page.

If you are using LMS authentication, you can also assign a default LMS provider for authentication on the Academic Institution 3 page.

Every time that you schedule a new class, the system uses the values on the Academic Institution 3 page as default values on the Schedule of Classes - LMS Data page.

5. (Optional) If you want to automatically include only some of your newly scheduled classes in the LMS extract file type, you can specify the desired LMS extract file type, and if required, the LMS provider for authentication, on each course's respective Course Catalog - Components pages.

When you schedule classes, the system uses the values that you specify on the Course Catalog - Components page as default values on the Schedule of Classes - LMS Data page instead of using the values from the Academic Institution 3 page.

Note. You can set up default values at the institution level or at the catalog level to populate the schedule of classes. However, the extract uses only the values that are set at the class level.

6. You can add or modify LMS options on the Schedule of Classes - LMS Data page or on the Schedule New Course - LMS Data page.

The LMS extract file type that is specified on the LMS Data page autogenerates an LMS extract group ID. The batch extract uses these LMS values, as does the self-service authentication process, when linking a student or instructor from a self-service page to the academic content for the class on the LMS website.

For each class that does *not* require authentication to use an LMS or other website, enter the target URL on the Schedule of Classes - LMS Data page. The URL address must be complete (for example, include "http://").

Note. Do *not* enter URLs for classes that require authentication. The system autogenerates the required URLs from the Student Center, My Class Schedule, Faculty Center - My Teaching Schedule, and Learning Management Systems self-service pages.

Pages Used to Set Up LMS Values and Default Options

Page Name	Definition Name	Navigation	Usage
LMS Datasource	LMS_DATASOURCE	Curriculum Management, Learning Management Systems, LMS System Setup, LMS Datasource	Set up codes and descriptions for potential XML batch extract sources.
LMS Target	LMS_TARGET	Curriculum Management, Learning Management Systems, LMS System Setup, LMS Target	Set up codes and descriptions for potential XML batch extract targets.
LMS Type	LMS_TYPE	Curriculum Management, Learning Management Systems, LMS System Setup, LMS Type	Set up codes and descriptions for potential XML batch extract types.
Learning Management System Authentication Profile	ESA_PROFILE_PG	Curriculum Management, Learning Management Systems, LMS Authentication Profile, Learning Management System Profile	Set up authentication profiles to communicate with your external LMS websites and to synchronize keys between your PeopleSoft site and the LMS site.

Page Name	Definition Name	Navigation	Usage
LMS Provider	LMS_INT_SETUP	Curriculum Management, Learning Management Systems, LMS Provider Setup, LMS Provider	Set up codes, descriptions, and LMS authentication profiles to enable authentication for students and instructors to access their LMS home page and LMS academic content pages. Using this page, define all LMS providers to be used with LMS authentication at your institution.
Academic Institution 3	INSTITUTION_TABLE3	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 3	Define a default provider for authentication and the LMS extract file type to use when scheduling new classes. Define remaining LMS options for the LMS batch extract to use.
Components	CRSE_CATALOG_CMPNT	Curriculum Management, Course Catalog, Course Catalog, Components	Enter default provider for authentication and LMS extract file type values on a course-by-course basis to use when scheduling new classes.
LMS Data	CLASS_LMS_SETUP	- Curriculum Management, Schedule of Classes, Schedule New Course, LMS Data - Curriculum Management, Schedule of Classes, Maintain Schedule of Classes, LMS Data	Enter or modify LMS values to use when generating the LMS batch extract and when clicking a class's LMS link on the self-service pages.

Setting Up LMS Datasource Values

Access the LMS Datasource page (Curriculum Management, Learning Management Systems, LMS System Setup, LMS Datasource).

LMS Datasource		
<u>*LMS Datasource Code</u>	<u>*LMS Datasource Description</u>	
BUADGRAD	Graduate School of Business Administration	+ -
BUADUGRD	Undergraduate School of Business Administration	+ -
EXTED	School of Extended Education	+ -
GRAD	Graduate Program	+ -
LAW	School of Law	+ -
LBART	College of Liberal Arts	+ -

LMS Datasource page

LMS datasource codes and descriptions are required on the LMS Batch Extract page as part of your run control parameters if you run the batch extract process with an LMS batch extract file type of XML V1.1. If you run the batch extract process with an LMS extract file type of Blackboard CourseInfo 4 or API Input format, this setup is not required.

LMS Datasource Code and LMS Datasource Description Enter an LMS datasource code and corresponding LMS datasource description for all valid data sources. The data source is an identifier for the site generating the XML file and is used in the properties object (header record).

For XML file types, the LMS datasource code must be entered at runtime on the LMS Batch Extract - Setup page.

Setting Up LMS Target Values

Access the LMS Target page (Curriculum Management, Learning Management Systems, LMS System Setup, LMS Target).

LMS Target		
<u>*LMS Target Code</u>	<u>*LMS Target Description</u>	
BUADSRVR	School of Business LMS Server	+ -
LAWSRVR	School of Law LMS Server	+ -
LBARTSSVR	Liberal Arts LMS Server	+ -
PSUNVSRVR	PSUNV Shared LMS Server	+ -

LMS Target page

LMS target code and description information is required on the LMS Batch Extract - Setup page as part of your run control parameters if you run the batch extract process with an LMS type of XML V1.1. If you run the batch extract process with an LMS extract file type of Blackboard CourseInfo 4 or API Input format, this setup is not required.

LMS Target Code and LMS Target Description

Enter an LMS target code and corresponding LMS target description for all valid recipients of the XML files. The target code is an identifier for the site receiving the XML file and is used in the properties object (header record).

For XML file types, the LMS target code is entered at runtime on the LMS Batch Extract - Setup page.

Setting Up LMS Type Values

Access the LMS Type page (Curriculum Management, Learning Management Systems, LMS System Setup, LMS Type).

LMS Datasource LMS Target LMS Type		
*LMS Type Code	*LMS Type Description	
BUSADCLASS	Business Administration Classes	+ -
EXTDCLASS	Extended Ed Classes	+ -
GRADCLASS	Graduate Classes	+ -
LAWCLASS	Law Classes	+ -
LBARTCLASS	Liberal Arts Classes	+ -
UGRDCLASS	Undergraduate Classes	+ -

LMS Type page

LMS type and description information is required on the LMS Batch Extract - Setup page as part of your run control parameters if you run the batch extract process with an LMS type of XML V1.1. If you run the batch extract process with an LMS extract file type of Blackboard CourseInfo 4 or API Input format, this setup is not required.

LMS Type Code and LMS Type Description

Enter an LMS type code and a corresponding LMS type description to specify the nature of any extract that you may perform with this type. The type code is used in the properties object (header record).

For XML types, the LMS type code is entered at runtime on the LMS Extract - Setup page.

Setting Up LMS Authentication Profiles

If you plan to use PeopleSoft LMS authentication, you must configure your system to communicate with external LMS sites by creating an LMS authentication profile and synchronizing the keys between your PeopleSoft site and the external LMS site. Keys enable the two sites to recognize the requests that are passed between them and to authenticate your self-service users to the LMS site.

Using LMS authentication, end-users sign on one time to enter the PeopleSoft Campus Self Service.

When using the self-service Learning Management Systems page, users can click an LMS provider link, which will take them to their home page within the LMS system such as WebCT. For classes, you can assign LMS providers for authentication at the Academic Institution and Course Catalog Component level. The system then uses the provider as a default value when adding a class to the schedule of classes. You can also assign or update providers at the class level.

If an LMS provider is assigned to a class, the system displays an LMS button next to the class within the self-service Student Center, My Class Schedule page, and Faculty Center - My Teaching Schedule page. When students or instructors click the button, the system quickly performs the authentication and moves the user to the academic class content on the LMS website. The authentication happens without users explicitly signing on to the other site, without their having any sense of moving out of the PeopleSoft application, and without having to add another user ID or password to their ever-growing list of IDs and passwords.

You can also assign LMS providers without using LMS authentication for use on the Learning Management Systems self-service page. In this case, you assign a target URL, such as an institution or division website that has links to instructor web pages.

You can also use the LMS provider as a run control parameter within the LMS batch extract process.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Faculty Center," Using LMS Authentication

Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions, which is posted to My Oracle Support.

Defining LMS Providers

Access the LMS Provider page (Curriculum Management, Learning Management Systems, LMS Provider Setup, LMS Provider).

LMS Provider

Academic Institution: PSUNV PeopleSoft University

LMS Provider: CAMPUS LMS

Learning Management System Providers				
*Effective Date	01/01/1900	Effective Status	Active	
Description:	CAMPUS LMS			
LMS Authentication Profile	CAMPUS LMS	☒ Display as LMS Link		
Comments:	The Campus LMS allows users to access the school website that has links to individual faculty member websites.			

LMS Provider page

Effective Date	Enter the date when the status of this LMS provider becomes effective. Use a new effective date each time that you make a change to a provider. Insert new rows as needed, and modify the record.
Description	Enter the description to display to students and instructors from the self-service Learning Management System page.
LMS Authentication Profile	If the provider uses the LMS authentication feature, select the LMS authentication profile to use for that provider.
Default URL	The system hides and clears the Default URL field when you enter an LMS authentication profile. If you do not enter an LMS authentication profile, the Default URL field is available so that you can specify the default URL to use for a provider who does not use LMS authentication. You might want to use the URL that takes the user to an institution or division website from the Learning Management Systems page. Be sure to enter the complete URL (including http://).
Display as LMS Link	Select this check box to display the LMS provider as a link on the self-service Learning Management System page. The link enables users to access their LMS site homepage by way of PeopleSoft LMS authentication.
Comments	Enter comments to further describe or identify the LMS provider.

Defining LMS Default and Extract Options for Your Institution

Use the LMS Options group box on the Academic Institution Table 3 page to specify the LMS extract file type default values if all your classes need to be available to extract to a learning management system. If you plan to use PeopleSoft LMS authentication, you must also specify the provider for authentication.

The system uses the values that are defined on the Academic Institution Table 3 page as default values when adding a class to the schedule of classes.

The LMS batch extract uses the personal data extract parameters of phone type and address usage. The user ID extract option identifies whether the extract should use the student or instructor's employee ID or user ID. User IDs are created on the User Profile page.

Note. The user ID value is of particular importance for LMS authentication. For the user's authentication to work properly, the selected user ID extract option must be the same as the LMS authentication profile - authentication user ID value. If you set the user ID extract option to user ID on the Academic Institution Table 3 page, then authentication user ID must also be set to user ID on the LMS Authentication Profile page.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Setting Additional Institution Defaults and Options

Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions, which is posted to My Oracle Support.

Defining LMS Default Options for Course Components

Use the Course Catalog - Components page to enter LMS values on a course-by-course basis if you have not specified a default LMS extract file type and a default provider for authentication (if you plan to use PeopleSoft LMS authentication) on the Academic Institution 3 page. When you enter LMS values on the Course Catalog - Components page, the system overrides the values that are set on the Academic Institution 3 page and uses the Course Catalog - Components page values as defaults.

See Also

Chapter 6, "Setting Up the Course Catalog," Defining Course Components, page 108

Defining LMS Options for Classes

If you have not specified, on either the Academic Institution 3 page or the Course Catalog - Components page, a default LMS extract file type and a default provider for authentication (if you plan to use PeopleSoft LMS authentication), you must enter your LMS values on the Schedule of Classes - LMS Data page.

All LMS classes must have an LMS extract file type and an LMS extract group ID defined on the Schedule of Classes - LMS data page. You can also modify the LMS that comes in from the Academic Institution 3 page or the Course Catalog - Components page.

Note. You must assign an extract file type to use. To use PeopleSoft LMS authentication, you must use the XML LMS extract file type and you must identify a provider for authentication.

The LMS authentication is designed to work with the IMS enterprise system specifications that are used to create the batch XML V1.1 extract file. When the XML V1.1 LMS extract file type is designated within the Schedule of Classes, the system autogenerates the LMS extract group ID. During the extract process and LMS authentication from self-service pages, the system creates a unique class identifier by supplementing the LMS group ID with a term code and the class number.

If you do not want to use LMS authentication, but want to link students who are enrolled in a class to a designated URL such as an instructor's website, you can specify the website in the LMS URL field. The website URL must be preceded by the http:// designation.

Note. Do not specify URLs for classes that require authentication to the LMS site. When using PeopleSoft LMS authentication, the system autogenerates the required URLs from the Student Center, My Class Schedule, and Faculty Center - My Teaching Schedule self-service pages.

See Also

Chapter 42, "Managing Interoperability for LMSs," Defining LMS Options for Classes, page 1034

Running the LMS Batch Extract Process

Use the PeopleSoft LMS Batch Extract process to create extract files of object properties data in the appropriate format for your target LMS. If you use PeopleSoft LMS authentication, you must use the XML LMS extract file type and select the appropriate provider for authentication.

You can specify all of your runtime parameters on the LMS Batch Extract - Setup and LMS Extract - Criteria pages, and designate the appropriate file path for your extract files on the LMS Batch Extract - Output page. After the process finishes, you can locate your extract files in the file directory that you specify. You can run the extract process in either snapshot or update mode.

Prerequisites

Before you can perform an extract for XML V1.1, you must create LMS datasource, LMS target, and LMS type values in the LMS Setup component.

See Also

Chapter 42, "Managing Interoperability for LMSs," Setting Up LMS Values and Default Options, page 1027

Pages Used to Extract LMS Data

Page Name	Definition Name	Navigation	Usage
LMS Batch Extract Process - Setup	RUNCTL_SRLMSEX1	Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Setup	Specify properties and parameters for the extract process and header properties object.
LMS Batch Extract Process - Criteria	RUNCTL_SRLMSEX2	Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Criteria	Further narrow your specifications for the extract process.
LMS Batch Extract Process - Output	RUNCTL_SRLMSEX3	Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Output	Specify the extract file path and storage conventions for the extract process.

Defining LMS Run Control Parameters

Access the LMS Batch Extract Process - Setup page (Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Setup).

Setup

Criteria

Output

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Run

*Institution:

PSUNV

PeopleSoft University

*Term:

0530

2004 Fall

File Properties

Provider for Authentication

WEBCT

*LMS Extract File Type:

XML V1.1 (req to authenticate)

Datasource:

College of Liberal Arts

Target:

Liberal Arts LMS Server

Type:

Liberal Arts Classes

*Extract Mode:

Snapshot

Language:

EN

LMS Batch Extract Process - Setup page

Institution	Enter the institution that specifies the source of the extract data.
Term	Enter the term that specifies the source of the extract data.
Provider for Authentication	Specify the authentication provider to use within the extract. Single signon providers are defined on the LMS Provider Setup page and are assigned to classes on the Schedule of Classes - LMS Data page.
LMS Extract File Type	Specify the file type, or extract format, to use within the extract. Values are: <i>XML V1.1</i> (required for PeopleSoft LMS authentication), <i>Blackboard CourseInfo 4</i>, and <i>API Input</i> (the WebCT format that is currently being phased out; however, WebCT Campus Edition and Vista both support XML V1.1). Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The LMS extract file type that you specify here must be the same as the LMS extract file type that is assigned to the LMS classes on the Schedule of Classes - LMS Data page. Note. If you select a file type of <i>Blackboard CourseInfo4</i> or <i>API Input</i>, the Datasource, Target and Type fields will be unavailable.
Datasource and Target	Enter the datasource and target that will serve as identifiers for the site generating the XML file. For example, you might have a datasource of <i>College of Liberal Arts</i> and a target of <i>Liberal Arts LMS Server</i> .
Type	Enter the extract type that describes the classes that you want to extract. For example, keeping with the datasource and target examples, you might enter <i>Liberal Arts Classes</i> .

Extract Mode

Specify an extract mode. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The current set of values include:

Snapshot: Full set of data for purposes of initial group creation or reloads.

Update: Partial set of changes that applies to enrollment, group, and group membership.

The effectiveness of the LMS extract mode of *Update* on the run control page depends on the LMS extract file type on the Schedule of Classes - LMS Data page. This is because Blackboard CourseInfo 4.0 standard edition and API Input (the WebCT format that is currently being phased out) both have limiting specifications on what data they can currently accept in update form. When you run Blackboard CourseInfo 4 in *Update* mode, only new user and new course data since the last time the process ran is accepted. When you run API Input in *Update* mode, only new user and new course data, since the last time the process ran, and new enrollment and new course list information, is accepted.

In addition, students who dropped prior to the drop or retain date are not included in any update of the LMS extract. In other words, if you run a snapshot, then run an update prior to the drop or retain date, any students dropped since the snapshot are not updated or deleted from the LMS because their enrollments have been deleted from the PeopleSoft system. Plan your refresh schedule with this in mind.

Language

Enter a two-character language value that will serve as an attribute of the properties object, for example, <PROPERTIES lang="en">,ISO 639 format. This field is optional.

After you enter all necessary data on the LMS Batch Extract - Setup, LMS Batch Extract - Criteria, and LMS Batch Extract - Output pages, click Run to run this request. PeopleSoft Process Scheduler runs the LMS Batch Extract process at user-defined intervals.

Defining LMS Run Control Criteria

Access the LMS Batch Extract Process - Criteria page (Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Criteria).

Setup	Criteria	Output
Run Control ID: 1		Report Manager Process Monitor Run
Selection Criteria		
☐ None ☒ Filter ☐ Class Number		
Career:	UGRD	Undergraduate
Session:	1	Regular Academic Session
Campus:	MAIN	Main Hacienda Campus
Academic Group:		
Subject Area:	MATH	Mathematics
Catalog Nbr:		
Class Nbr:		

LMS Batch Extract Process - Criteria page

The fields on this page prompt against the institution and term that you specify on the LMS Batch Extract - Setup page. If you do not enter any narrowing parameter information on the LMS Batch Extract Process - Criteria page, the process runs for the institution and term that are specified on the LMS Batch Extract Process - Setup page.

Selection Criteria

Select an option to indicate the level of filtering to apply in addition to the parameters on the LMS Batch Extract Process - Setup page.

None	Select to disable all fields.
Filter	Select to enable the field filters.
Class Number	Select to disable the field filters and enable the Class Nbr (class number) field.

Additional Elements

Career	Enter a career if you want to isolate only those courses that are offered under a particular academic career.
Session	Enter a session to isolate classes within the term that are specified on the LMS Batch Extract Process - Setup page and within a particular session.

Campus	Enter a campus to filter those classes that are offered by a particular campus.
Academic Group	Enter an academic group to filter classes that are associated with a particular group.
Subject Area	Enter a subject area to filter those classes with a particular subject.
Catalog Nbr (catalog number)	Enter a catalog number to isolate a particular course.
Class Nbr (class number)	Enter a class number to specify a particular class offering. This field is available when the Class Number option is selected.

After you enter all necessary data on the LMS Batch Extract Process - Setup, LMS Batch Extract Process - Criteria, and LMS Batch Extract Process - Output pages, click Run to run this request. PeopleSoft Process Scheduler runs the LMS Batch Extract process at user-defined intervals.

Note. The system treats cleared fields as wild cards and returns all values.

Defining LMS Output Parameters

Access the LMS Batch Extract Process - Output page (Curriculum Management, Learning Management Systems, LMS Batch Extract Process, Output).

The screenshot displays the 'Output' tab of the LMS Batch Extract Process configuration page. At the top, there are three tabs: 'Setup', 'Criteria', and 'Output', with 'Output' being the active tab. Below the tabs, the 'Run Control ID' is set to 'PS'. To the right of this, there are links for 'Report Manager' and 'Process Monitor', and a prominent yellow 'Run' button. The 'File Path' is specified as 'c:\temp\0550.xml'. Below this, the 'Combine Output' checkbox is checked, and the output file name is '0450-LIBARTS-SNAPSHOT-COMBO.XML'. A 'File Selection' section is expanded, showing a list of files with checkboxes for 'People', 'Group', and 'Membership', all of which are checked.

LMS Batch Extract Process - Output page

Note. The LMS Batch Extract Process - Output page appears differently depending on the file type (*XML*, *Blackboard*, or *API*) that you select.

File Path	Enter a file path to indicate the extract file location. This is where your extracted people, classes, and enrollment files are located. In addition to sending report output for this process to a file (through setting preferences in the PeopleSoft Process Monitor), you can also send any additional output files that are created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator.
Combine Output	This check box is available if you select a file type of <i>XML V1.1</i> on the LMS Batch Extract Process - Setup page. Select this check box to combine person, group, and membership objects into one file. When this check box is cleared, you can further specify the level and location of objects to extract. In doing so, you must also create individual file names for each object. Note. You must always include the file type (such as XML) in the output name.
People	Select this check box to include person object data in the extract for all students and instructors who are associated with the selected LMS classes. Enter a corresponding file name for this data. This check box is unavailable if you select a file type of <i>API Input</i> (the WebCT format that is currently being phased out) on the LMS Batch Extract Process - Setup page.
Group	Select this check box to include group object data in the extract for all selected LMS classes. Enter a corresponding file name for this data.
Membership	Select this check box to include membership object data in the extract, which identifies each LMS class and the students and instructors who are associated with the class. Enter a corresponding file name for this data.

After you enter all necessary data on the LMS Batch Extract Process - Setup, LMS Batch Extract Process - Criteria, and LMS Batch Extract Process - Output pages, click Run to run this request. The LMS Batch Extract process:

- Collects and stores the appropriate data in an extract file (or files) with the name and file path that you specify.
- Creates an SQR .log file that provides detail about the process itself.
- Creates a detailed LMS Batch Extract report (SRLMSEX.<file extension>) that highlights the parameters, messages, and total record count for the process.

PeopleSoft Process Scheduler runs the LMS Batch Extract Report process at user-defined intervals.

Click the Process Monitor link to access the Process Detail page, where you can view the status of submitted process requests. From the Process Detail page, click the View Log/Trace link to access the SQR .log and LMS Batch Extract report (SRLMSEX.<file extension>).

Using Self-Service Pages and LMS Authentication

If your institution has licensed PeopleSoft Campus Self Service, students and instructors can access LMS websites from your system.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Faculty Center," Using LMS Authentication

Chapter 43

Grading Students

This chapter provides an overview of grading and discusses how to:

- Print grade rosters.
- Enter grades online.
- Enter grades through self service.
- Enter grades through the self-service Gradebook.
- Post the Grade Roster.
- Generate midterm deficiency reports and communications
- Run the grade lapse process.
- Produce the student grade report.
- View student grades and statistics.
- Audit grade changes.

See Also

Chapter 12, "Setting Up Grading," page 287

PeopleSoft Gradebook 9.0 PeopleBook, "Using the Self-Service Gradebook"

Understanding Grading

After you set up your grading schemes and grade bases, define mapping rules, and generate grade rosters, you are ready to enter grades.

You can enter grades in one of three ways:

- System administrators or power users can enter grades directly on the Grade Roster page for each class.
- Instructors can define class assignments, percentages, and even electronically communicate with students by entering grades directly through PeopleSoft Gradebook, a separately licensed PeopleSoft application.
- Instructors or other authorized self-service users can enter midterm and final grades through PeopleSoft Campus Self Service, a separately licensed PeopleSoft application.

See Also

PeopleSoft Gradebook 9.0 PeopleBook, "Using the Self-Service Gradebook"

Prerequisites

Before you can enter and post grades, you must:

- Set up your grading schemes and grade bases.
- Define mapping rules.
- Generate grade rosters.

See Also

Chapter 12, "Setting Up Grading," Understanding Grade Preparation, page 287

Printing Grade Rosters

This section provides an overview of printing a grade roster and discusses how to run the Grade Roster report.

Understanding Printing a Grade Roster

Some organizations have business processes that use grade rosters in printed form. This section discusses how to print grade rosters in batch or for a specific class.

Complete these steps to print grade rosters:

1. Access the Grade Roster Print page.
2. Enter your run control parameters.
3. Click the Run button.
4. Locate your printed rosters through the Report Manager link, and print them as needed.

Page Used to Print Grade Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Grade Roster Print	RUNCTL_SRGRDROSTER	Curriculum Management, Grading, Print Grade Roster, Grade Roster Print	Print generated rosters.

Running the Grade Roster Report

Access the Grade Roster Print page (Curriculum Management, Grading, Print Grade Roster, Grade Roster Print).

Grade Roster Print page

Academic Institution	Select the institution for which to print rosters.
Term	Select a term for the roster. Term values are defined on the Term Table page.
Grade Roster Type	Select the grade roster type to print. The default is <i>Final</i> . Grade roster type values are delivered with your system as translate values. While you should not change the <i>Final Grade</i> value, you can add as many nonfinal grade values as you want.
Print Note Area	Select to provide extra space on the roster for instructors to write notes.
Print Incomplete Area	Select to provide extra space on the roster for instructors to make note of incomplete information.
Specific Class	Select to print a roster for one class.
Class Nbr (class number)	If you select the Specific Class check box, the Class Nbr field becomes available. Select the class number for the roster to print.

Academic Organization	If you do not select the Specific Class check box, select an academic organization. Academic organization values are defined on the Academic Organization Table page.
Session	Select the session for which to print rosters.
Class End Date From and Class End Date To	Select the class end date from and to dates. The system selects rosters to print for classes with an end date that is greater than or equal to the value in the Class End Date From field and less than or equal to the value in the Class End Date To field.
Campus	Select the campus that is associated with the grade rosters. Attach campus values to courses in the course catalog and to classes in the schedule of classes.
Instructor Print Option	Select the type of instructor information to print on the grade roster for the graded component. Attach instructor values to classes on the Schedule of Classes - Basic Data page. Values are: <i>All:</i> Prints the names of all instructors. <i>Grdng Auth:</i> Prints only the name of the instructor who is authorized to grade. <i>None:</i> Prints no instructor names.
Print Course Administrator	Select to print the course administrator's name on the grade roster. Attach course administrator values to classes on the Schedule of Classes - Basic Data page.
Print Blind Grading ID	Select to print the blind grading IDs of students. Student names do not appear on the roster.

Entering Grades Online

This section provides an overview of entering grades online and discusses how to:

- Use the Grade Roster page to enter grades.
- Review student enrollment detail.
- Review transcript notes.
- Review student incomplete information.

Understanding Entering Grades Online

System administrators and power users can enter grades directly to the Grade Roster page for each class. Complete these steps to enter grades online:

1. Enter grades and transcript notes on the Grade Roster page.
2. (Optional) Review student enrollment detail on the Student Enrollment Detail page.
3. (Optional) Enter or review a transcript note for the student on the Transcript Note page.
4. (Optional) Enter student incomplete information on the Student Incomplete page.
5. Save the grade roster.

Pages Used to Enter Grades Online

Page Name	Definition Name	Navigation	Usage
Grade Roster	GRADE_ROSTER1	Curriculum Management, Grading, Grade Roster, Grade Roster	Enter official grades and requirement designation grades, view enrollment summary information, and add transcript notes.
Enrollment Detail	GRADE_ROSTER_ENRL	Click the Detail link on the Grade Roster page.	Review detailed information about a student's enrollment, including their primary academic program, grading basis, units taken, and so on.
Transcript Note	GRADE_ROSTER_NOTEA	Click the Note link on the Grade Roster page.	Enter or view a transcript note that is related to the student's enrollment record. The system displays this note on transcript types for which the Print Transcript Notes check box is selected on the Enrollment/Statistics page.
Student Incomplete	GRADE_ROSTER_INCA	Click the Incomplete Detail button on the Transcript Note page.	Enter a lapse deadline, lapse to grade, or comment for students who have no grade or a grade that is equivalent to a grade of <i>Incomplete</i> .

Using the Grade Roster Page to Enter Grades

Access the Grade Roster page (Curriculum Management, Grading, Grade Roster, Grade Roster).

Grade Roster Type		Grade Roster	
Find First 2 of 2 Last			
Term:	2005 Sum	Class Nbr:	1254 Perspectives on the Present
Session:	Twelve Wk	Catalog:	HISTORY 100
		Section:	1
		Seq Nbr:	2
Roster Type			
Final Grade	Final Grade	☐ Display Unassigned Roster Grade Only	
Approval Status:		Not Reviewed	
ID	Name	Roster Grade	Converted Roster Grade
1 SR12206	Kalombo,Chantal		
2 SR12201	Keshishi,Khanom	A+	A
3 SR12202	Lancet,Amit	B	B
4 SR12210	Omar,Raad		
5 SR12212	Pople,John		
6 SR12031	Ruiz,Robert		WF

Grade Roster page

If you use blind grading IDs, the roster lists students in random order. If you do not use blind grading IDs, the roster lists students in ID order.

Sort Option

This option is available on Open Entry/Exit class rosters. You can sort IDs in one of two ways. Values are:

Last,First: Sorts IDs by last name.

Date,Last: Sorts IDs by fully graded date, and then by last name within the start date. This view is particularly useful for classes that are offered in open entry and open exit format, where students can have fully graded dates that differ.

Display Unassigned Roster Grade Only

Select to view only those students with unassigned grades. This option is particularly useful for open entry and open exit classes for which you might grade students at different intervals based on their various end dates.

Roster Grade

Enter the student's grade for the course. This field displays only grades assigned on the grade roster; it does not display grades assigned in enrollment. After grades are posted, this field displays the grade but is unavailable for updating.

All active Grade Input values from the Grading Scheme Table page are available in the Roster Grade field, regardless of whether the Include in Self Service check box on the Grading Scheme Table page is selected.

Converted Roster Grade

This field appears when at least one roster grade has a value defined in the Convert to Grade field on the Grading Scheme Table page.

The Converted Roster Grade field continues to appear when grades are posted.

Official Grade

This field displays posted grades and grades that have been assigned on a student enrollment page.

Roster RD Grade(roster requirement designation grade)

This field becomes available if the class has a requirement designation that requires a separate grade. Values are:

Satisfied: A basic credit.

Not Satisfied: No credit type of grade.

If the requirement designation requires a separate grade, then it is assumed that the requirement designation is satisfied when a passing grade is posted for the student.

See [Chapter 4, "Preparing for the Course Catalog and Schedule of Classes," Defining Requirement Designations, page 38.](#)

Detail

Click to access the Student Enrollment Detail page, where you can view detailed information about each enrollment.

Note

Click to access the Transcript Note page, where you can view a transcript note that is related to the student enrollment record.

After a student's grade is posted or assigned and saved on an enrollment page, the student's final roster grade field becomes unavailable for update. The system displays the roster's approval status on the Grade Roster page, as well as a status of *Posted* when the roster is posted.

Reviewing Student Enrollment Detail

Access the Enrollment Detail page (click the Detail link on the Grade Roster page).

Enrollment Detail				
Course Detail				
Term:	2003 Fall	ENGLLIT	100	1
Class Nbr:	1111	Surv Brit Lit		
ID:	SR13582	Basile, Valerie		
Grade Detail				
Status / Reason:	Enrolled	Enrolled		
Prim Prog:	Liberal Arts Undergraduate			
Grading Scheme:	Undergraduate Grading Scheme			
Grading Basis:	Graded			
Grade In/Official:	B	/	B	
Units Taken:	3.00			

Enrollment Detail page

Use this page to view detailed information about a student's enrollment. You can view the student's enrollment status, grading basis, units taken, and primary academic program. If you have already entered a grade for the student, you can also view the grade in and official grade.

Reviewing Transcript Notes

Access the Transcript Note page (click the Note link on the Grade Roster page).

Grade Roster

Transcript Note

Name:

Amato,Gina

▼ Class Section Information

Term:

2001 Fall

Subject:

ART

Catalog Nbr:

113

Class Nbr:

1226

Section:

1

Description:

History of World Art

Note ID:

IREM

Incomplete Removed

Transcript Note

Find | View All

First

1 of 1

Last

Sequence Number:

1

+

-

Transcript Note

Transcript Note page

Note ID	Enter a value. Note ID values are defined on the Transcript Note Table page.
Transcript Note	Enter free-form text. The system displays this text in addition to the predetermined transcript note ID text.
Transcript Note Sequence Nbr (transcript note sequence number)	The system increments the transcript note sequence number for each row of free-form text. The sequence number determines the order in which the free-form transcript notes appear on the transcript (if they appear).
Incomplete Detail	If you enter a grade of <i>Incomplete</i> on the Grade Roster page, the Incomplete Detail link is available. Click this link to enter data related to an <i>Incomplete</i> grade.

Note. Users cannot add, change, or remove transcript notes from the grade roster after grades are posted. After grades are posted, users can add, change, and remove transcription notes from any one of the administrative enrollment pages and then regenerate the grade roster:

Enrollment: On Student Enrollment 3 page, enter a new note, modify an existing note, or delete a current note.

Enrollment Request: Select the action of *Normal Maintenance* for the class and enter a new note, modify an existing not, or delete a current note. Be sure to submit the transaction.

Quick Enroll: Select the action of *Normal Maintenance* for the class and then, on the Other Class Info page, click Create Transcript Note. Enter a new note, modify an existing note, or delete a current note. Be sure to submit the transaction.

To update the grade roster with the changes to the transcript notes, navigate to the Grade Roster Type page, select Override, and click the Create button to regenerate the grade roster.

Reviewing Student Incomplete Information

Access the Student Incomplete page (click the Incomplete Detail button on the Transcript Note page).

Transcript Note			
Student Incomplete			
Name:	Amato,Gina		
▼ Class Section Information			
Term:	2001 Fall		
Subject:	ART	Catalog Nbr:	113
Class Nbr:	1226	Section:	1
Description:	History of World Art		
Grade In/Off			
Grade In/Official		/	
Lapse Status			
Incomplete			
Lapse Deadline:	01/04/2002		Lapse To Grade: F 
Comment:	  		

Student Incomplete page

Lapse Deadline and Lapse To Grade The system populates these fields when you enter a grade of *Incomplete*. The system creates a student incomplete record when you post the *Incomplete* grade. However, you can manually enter these values. If the student has an *Incomplete* grade, you can specify the date for this grade to lapse to another grade. The Grade Lapse process does not overwrite values that are entered manually.

Comment Enter any comments about the lapse grade. These comments do not appear on the transcript.

See Also

[Chapter 43, "Grading Students," Viewing the Lapse Report Results Online, page 1063](#)

[Chapter 43, "Grading Students," Defining Grade Lapse Rules, page 1060](#)

Entering Grades Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your instructors can access grade rosters and enter midterm and final grades directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Faculty Center," Entering Grades Through Self-Service

Entering Grades Through the Self-Service Gradebook

In addition to the grade methods mentioned in the previous section, instructors can use PeopleSoft Gradebook to enter grades for individual assignments, quizzes, and tests, midterm grades, and final grades. PeopleSoft Gradebook is a separately licensed application.

See Also

PeopleSoft Gradebook 9.0 PeopleBook, "Using the Self-Service Gradebook"

Posting the Grade Roster

Posting the grade rosters is an important step because it officially assigns final class grades to the students' career term records.

This section provides an overview of posting grades, lists prerequisites, and discusses how to:

- Post grades for a single class.
- Post grades for multiple classes.

Understanding How to Post Grades

You can post grades in these ways:

- Post grades for a single class on the Grade Roster page.
- Post grades for a single class on the Self Service Grade Roster page.
- Post grades for multiple classes on the Grade Post page.

Post Grades for a Single Class

Complete these steps to post grades for a single class:

1. (Optional) To perform a partial post of grades, select the Partial Post check box and click the Post button on the Grade Roster page.
2. To post the entire grade roster, clear the Partial Post check box and click the Post button on the Grade Roster page.

Post Grades on the Self-Service Grade Roster Page

Complete these steps to post grades on the self-service Grade Roster page:

Note. The instructor must have post access to be able to post from Campus Self Service.

1. Assign grades on the Self Service Grade Roster page.
2. Set approval status to approved and save.
3. Click Post.

Post Grades for Multiple Classes

Complete these steps to post grades for multiple classes:

1. Access the Grade Post page and specify the institution, term, and partial post option for which you want to post grades.

2. (Optional) Narrow the batch for which you want to post grade rosters by entering any of the following values:
 - a. *Session*
 - b. *End date*
 - c. *Academic Organization*
 - d. *Subject Area*
3. (Optional) Add rows as needed.
4. Click the Run button.

Prerequisites

Before you can post grades, you must:

- Generate the grade rosters.
- Enter grades on the Grade Roster page or enter grades through the PeopleSoft Gradebook application.

See Also

[Chapter 12, "Setting Up Grading," page 287](#)

Pages Used to Post Grade Rosters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Grade Roster Type	GRADE_ROSTER_TYPE	Curriculum Management, Grading, Grade Roster, Grade Roster Type	Click the Post button on the Grade Roster Type page to post grades on a course-by-course basis. For partial posting, select the Partial Post check box before you click the Post button.
Grade Post	RUNCTL_GRD_POST	Curriculum Management, Grading, Grade Post, Grade Post	Post grades for multiple classes. You can post grades for multiple classes within an academic organization or subject area.

Posting Grades for a Single Class

Access the Grade Roster Type page (Curriculum Management, Grading, Grade Roster, Grade Roster Type).

Click the Post button to post grades on a course-by-course basis. For partial posting, select the Partial Post check box before you click the Post button.

See Also

Chapter 12, "Setting Up Grading," Creating Grade Rosters for a Single Class, page 302

Posting Grades for Multiple Classes

Access the Grade Post page (Curriculum Management, Grading, Grade Post, Grade Post).

Grade Post

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PSUNV

PeopleSoft University

*Term:

0620

2009 Spring

Session	Class End Date From	Class End Date To	Academic Organization	*Partial Post Option		
Twelve Wk	02/06/2009 31	03/20/2009 31	LIBARTS	No	+	-

Grade Post page

- Academic Institution

Select the academic institution for the grade posting. This value determines which terms, sessions, and other field values are available.
- Term

Select the term for the grade posting. Term values are defined on the Term Table page.
- Session

Select the session for the grade posting. Session is an optional field. Session values are defined on the Session Table page.
- Class End Date From and Class End Date To

Select the class end date from and to dates. The system selects rosters to create for classes with an end date that is greater than or equal to the value in the Class End Date From field and less than or equal to the value in the Class End Date To field. Both fields are optional and one may be entered without the other.
- Academic Organization

Select either an academic organization or a subject area in which to post grades. Academic organization values are defined on the Academic Organization Table page.

Subject Area	Select either an academic organization or a subject area in which to post grades. Subject area values are defined on the Academic Subject Table page.
Partial Post Option	Select to post only those grades that you enter and save on the roster. Later, you can enter the remaining grades and post those. Values are: Yes: Select to partially post all rosters in your parameters, regardless of whether or not the rosters are missing grades. The batch grade post process performs a partial post on all grade rosters, regardless of whether you selected the Partial Post check box on the Grade Roster Type page. No: Select to post only rosters that have a status of <i>Approved</i>. This option does not permit reposting of the same roster type. Note. After the system posts the grades, all statistics accumulate. If any revisions are needed on individual records, you must make these on a student-by-student basis on an enrollment page or on the self-service Grade Roster page, request grade change.

Generating Midterm Deficiency Reports and Communications

This section provides an overview of midterm deficiency reporting and discusses how to:

- Generate the midterm deficiency report.
- Generate midterm deficiency letters.

Understanding Midterm Deficiency Reporting

The Mid-Term Deficiency process generates a report that lists students with deficient midterm grades. Deficient grades are those grades with a grade input value that is equal to the value in the Grade Input field on the Mid-Term Deficiency Report page.

Page Used to Monitor Midterm Deficiencies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mid-Term Deficiency Report	RUNCTL_SRTRMDEFCNY	Curriculum Management, Grading, Mid-Term Deficiency Report, Mid-Term Deficiency Report	Produce a summary report of all students whose grades are deficient during the midterm for each class.

Generating the Midterm Deficiency Report

Access the Mid-Term Deficiency Report page (Curriculum Management, Grading, Mid-Term Deficiency Report, Mid-Term Deficiency Report).

Mid-Term Deficiency Report

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSUNV PeopleSoft University

*Term: 0518 2004 Spring

Find | View All | First 1 of 1 Last

Sequence Number: 1

Academic Organization: ENGLISH English

Session: Regular Regular Academic Session

Class End Date From: 12/11/2004

Class End Date To: 12/11/2004

Campus: MAIN

*Grading Scheme: UGD

*Grade Input: F

Mid-Term Deficiency Report page

The system inserts the IDs of all students with deficient grades into the Communication table so that you can easily identify them and create individual warning letters.

Academic Institution Select an academic institution for which to evaluate students.

Term Select a term for the system to use as it searches for student enrollment records. Term values are defined on the Term Table page.

Academic Organization Select an academic organization for the system to use as it searches for records. Academic organization values are defined on the Academic Organization Table page.

Session Select a session for the system to use as it searches for records. Session values are defined on the Session Table page.

Class End Date From and Class End Date To	Select the class end date from and to values. The values in these fields further narrow your processing parameters. The system evaluates enrollment records for classes that are active between these dates and within all other parameters you specify.
Campus	Select a campus for the system to use as it searches for records. Campus values are defined on the Campus Table page.
Grading Scheme	Select a grading scheme to prompt for appropriate grades in the Grade Input field. Grading scheme values are defined on the Grading Scheme Table page.
Grade Input	Select the grade that the system should seek to identify whether a student is midterm deficient.

Click Run to run the report using PeopleSoft Process Scheduler. The process populates the Communication table with IDs for students with deficient grades. Later, you can produce a letter to inform them of their status.

Generating Midterm Deficiency Letters

Complete these steps to generate midterm deficiency letters:

1. Set up midterm deficiency keys on the Communication Speed Keys page.

After you set these parameters, you do not have to set them each time you run the report. Select the Administrative Function of *STRM*, which is a delivered value. When defining your communication speed key for midterm deficiency reports, select the method of *letter*, the direction of *out*, and the letter code of *MAD* (Midterm Academic Deficiency).

2. Generate midterm deficiency reports on the Mid-Term Deficiency page.

In addition to generating a report of midterm deficiencies, the report places students with deficiencies into the Communication table so that you can generate a letter informing them of their deficient grades.

The Mid-Term Deficiency report creates one midterm deficiency communication record per student who fits the criteria for having deficiencies. After you run letter generation for letter code *MAD*, the system inserts a row in the corresponding comma delimited (.CSV) extract file for each deficient class for the term. Using Microsoft Word Merge, the system creates a single letter for a student with midterm deficient grades. The letter includes up to 10 classes in which the student is deficient.

If you run the Mid-Term Deficiency report and letter generation again at a later date, Microsoft Word Merge produces student letters that include all previously deficient classes for the term, as well as any newly selected deficient classes.

3. Generate letters on the Letter Generation - General Parameters page.

To generate midterm deficiency report letters, select the letter code of *MAD*.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Communications"

Running the Grade Lapse Process

This section provides an overview of the grade lapse process and discusses how to:

- Define grade lapse rules.
- Run the grade lapse process.
- View the lapse report results online.

Understanding the Grade Lapse Process

Use the Grade Lapse process to convert posted *In-progress* or *Incomplete* grades to some other grade that you specify. You can define grades as *In-progress* on the Grade Scheme table.

Typically, you run the Grade Lapse process two to three weeks after all grades are entered and posted. Your lapse deadline can be before the processing date.

Complete these steps to run the Grade Lapse process:

1. Define grade lapse rules for your academic programs on the Incomplete page.
2. Enter and post grades for a given time period.
3. Run the Grade Lapse process on the Grade Lapse page.
4. View new, lapsed grades on the Incomplete page.

After you set up your grade lapse rules, you can run the Grade Lapse process at any time. The Grade Lapse process uses the lapse grade that you indicate to populate the Student Incomplete page. Later, you can post the new grade.

Pages Used to Run the Grade Lapse Process

Page Name	Definition Name	Navigation	Usage
Repeat/Incomplete	INCOMPLETE_GRADE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete	Define grade lapse rules for academic programs. Each rule defines the grade that your incomplete grades lapse to when you run the report and what related transcript notes (if any) appear on a student's transcript.
Grade Lapse	RUNCTL_SR_GRD_LPS	Curriculum Management, Grading, Grade Lapse, Grade Lapse	Enter processing parameters for the Grade Lapse process and to run the process.

Page Name	Definition Name	Navigation	Usage
Student Incomplete	STDNT_INCOMPLETE	Records and Enrollment, Student Term Information, Student Incomplete, Student Incomplete	Review the Grade Lapse process results for an individual student.

Defining Grade Lapse Rules

Access the Repeat/Incomplete page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete).

Academic Program	Standing/Honors	Taxonomy/Campus	Repeat/Incomplete	Enrollment
Academic Institution: PSUNV PeopleSoft University Academic Program: LAU Liberal Arts Undergraduate				
Find View All First 1 of 1 Last				
Effective Date: 01/01/1900 Status: Active				
Repeat Rule				
Repeat Rule:				
Process on Enrollment: Yes v ☐ Temporarily Suspend Repeat Check on Enrollment				
Repeat Grade Check: Never v ☐ Temporarily Suspend Repeat Check on Grade Input				
Course Catalog Repeats				
*Course Catalog Repeat Message: None v				
Incomplete Grade				
Incomplete Grade: I v Incomplete ☒ Lapse Grade				
Lapse To Grade: F v Fail				
Lapse Days: 5				
Lapse Transcript Note ID:				
☒ Print Lapse Date				
Completed Transcript Note ID: IREM v Incomplete Removed				
☐ Print Completed Date				

Repeat/Incomplete page

Incomplete Grade	Enter a value that you define as an incomplete grade for students who are active in this program. This grade lapses to the value in the Lapse To Grade field as a result of the Grade Lapse process <i>only</i> if you select the Lapse Grade check box. If you neither select the Lapse Grade check box nor enter a Lapse To Grade value, then the system never lapses the incomplete grade. Grade values are defined on the Grading Scheme Table page.
Lapse Grade	Select to use the lapse grade rules for this incomplete grade. Some incomplete grades may not have lapse rules attached to them (in which case you would leave the Lapse To Grade field blank.) If you do not select this check box, the system does not change incomplete grades to any lapse grade value for classes taken in this academic program, and the lapse transcript note ID does not appear.
Lapse To Grade	Select the lapse to grade value. Grade values are defined on the Grading Scheme Table page.
Lapse Days	Enter the number of days past the fully-graded date that an incomplete grade can stay on a student's record. This value is provided by default from the Term Calendar 3 page to the student career term record during term activation. Lapse days function as a grace period. For example, assume that at PSUNV the fully-graded date for the undergraduate academic career (<i>UGRD</i>), term 0330, regular session (1) is 12/01/01. If the institutional policy at PSUNV for the LAU academic program allows a student to make up incomplete grades for one month past the term's end, you would enter <i>30</i> in the Lapse Days field. When you run the Grade Lapse process, use 1/10/02 as the lapse deadline. This way, you can be sure that all students who might make up an incomplete have done so and that the grades have been entered and posted. The additional 10 days provide you with time to post grades. Note. Run the grade lapse report after all grades are entered and posted, which can be after your lapse day's deadline.
Lapse Transcript Note ID	Select the transcript note ID for the lapse grade. Transcript note IDs are defined on the Transcript Note Table page.
Print Lapse Date	Select to display the lapse date on the student's transcript. The system uses the lapse days value to generate the lapse date. It does <i>not</i> use the lapse process date.
Completed Transcript Note ID	Select the transcript note ID that appears after the student's final grade is posted. Transcript note IDs are defined on the Transcript Note Table page.
Print Completed Date	Select to display the completed date on the student's transcript.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Programs

Running the Grade Lapse Process

Access the Grade Lapse page (Curriculum Management, Grading, Grade Lapse, Grade Lapse).

Grade Lapse

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Institution	*Career	*Term	*Lapse Deadline	Academic Program		
PSUNV	UGRD	0505	09/29/2004	LAU	+	-

Grade Lapse page

The Grade Lapse process converts the original *Incomplete* grade to the lapse grade. In addition, the process creates a report that lists all enrollment request numbers for grades that it lapses.

You should run this process two to three weeks *after* all grades are entered and posted. Your lapse deadline should be before the date you run the process.

- Institution**

Select the institution that the system uses to limit the scope of the process. The selected value defines which careers are valid.
- Career**

Select the academic career that the system uses to limit the scope of the process. The system evaluates students with enrollment records for this career.
- Term**

Select the term that the system should use to limit the scope of the process. The system evaluates students with enrollment records for this career and term.

Lapse Deadline

Select the lapse date deadline to specify the date for grades to lapse (change from their original grade to the *lapse to* grade). The lapse deadline must be greater than or equal to the fully-graded date plus the lapse days. The fully-graded date is set up on the Term Calendar 3 page, and the system populates this value by default to the student career term record during term activation or during the term activation update process. It is the date that the institution expects to have all grades posted for a particular career, term, and session. Lapse days are defined for an academic program and grade on the Incomplete page in the Academic Program Table component.

The Grade Lapse process looks at all of the student incomplete records that meet your processing parameters. It then uses the lapse deadline to determine which students have *Incomplete* grades on their records and converts those students' grades to the lapse grade value that you define on the Incomplete page in the Academic Program Table component.

Subsequent processes pick up any new *Incomplete* grades that you enter. You can run this process as many times as you need for a specific term and career.

Warning! The Grade Lapse process does not convert *Incomplete* grades that you enter on the Student Enrollment 1 page. *Incomplete* grades that you enter on this page do not have a corresponding row in the incomplete table.

Academic Program

Because different programs can have different lapse rules, select the academic program that the system uses to limit the scope of the population to process. Academic Program is an optional field.

Click Run to run this request. PeopleSoft Process Scheduler runs the Grade Lapse process at user-defined intervals.

Running the PSJob on the server generates the Grade Lapse report and automatically posts the transaction.

Viewing the Lapse Report Results Online

Access the Student Incomplete page (Records and Enrollment, Student Term Information, Student Incomplete, Student Incomplete).

Student Incomplete

David Orr

SR12211

Term:

2003 Fall

Career:

Undergrad

Institution:

PeopleSoft University

Find

View All

First

1 of 1

Last

Class Nbr:

1099

Criminology

Class Section:

1

Lecture

Catalog Nbr:

Sociology

205

Session:

Regular

Academic Group:

College of Liberal Arts

Career:

Undergrad

Status / Reason:

Enrolled

/

Enrolled

Status Date:

06/01/2005

Grade In/Official:

|

/

|

Grading Basis:

Graded

Lapse Status

Lapse Status:

Incomplete

Lapse Deadline:

01/04/2004

Lapse To Grade:

F

Comment:

Student Incomplete page

Lapse Deadline and Lapse To Grade

The grade post process populates the Lapse Deadline and Lapse To Grade fields. However, you can manually enter these values. If the student has an incomplete grade, you can specify the date for this incomplete grade to lapse to another grade. The process does not overwrite values that you enter manually.

Comment

Enter any comments about the lapse grade. The comments do not appear on the transcript.

Producing the Student Grade Report

This section lists a prerequisite and discusses how to run the student grade report.

Prerequisite

Post grades for the institution and term that you want to process.

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Page Used to Produce the Student Grade Report

Page Name	Definition Name	Navigation	Usage
Student Grade Report	RUNCTL_SRGRDRPT	Curriculum Management, Grading, Student Grade Report, Student Grade Report	Produce student grade reports for students in a particular academic career, program, or student group.

Running the Student Grade Report

Access the Student Grade Report page (Curriculum Management, Grading, Student Grade Report, Student Grade Report).

Student Grade Report page

Term	Select a term for the student grade report. Term values are defined on the Term Table page.
Career	Select the academic career for which the system should limit the report. Academic career values are defined on the Academic Career Table page.
Acad Prog (academic program)	Select an academic program for which the system should limit the report. Academic program values are defined in the Academic Program Table component.
Student Group	Select a student group for which the system should limit the report. Student group values are defined on the Student Group Table page.

Viewing Student Grades and Statistics

When you post grades, the system calculates term statistics. Use the Student Grade Inquiry component to view a student's grades and statistics for the term.

This section lists a prerequisite and discusses how to:

- View student grades.
- View term statistics.

Prerequisite

Before you can review term statistics, you must post grades for the term.

Pages Used to View Student Grades and Statistics

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Grade Inquiry	STDNT_GRADE_INQ	Records and Enrollment, Student Term Information, Student Grades, Student Grade Inquiry	Review grades for a student within a term.
Term Statistics	TERM_STATISTICS	Records and Enrollment, Student Term Information, Student Grades, Term Statistics	Review a student's current term statistics.

Viewing Student Grades

Access the Student Grade Inquiry page (Records and Enrollment, Student Term Information, Student Grades, Student Grade Inquiry).

Student Grade Inquiry		Term Statistics								
Kimberly Adams		AA0001	★							
		Print								
		Report Manager								
Term:	1998 Sprng	Career:	Undergrad							
Institution:	PeopleSoft University									
Detail	Class Nbr	Subject	Catalog	Component	Section	Grade Input	Official Grade	Grading Basis	Units Taken	Session
Detail	2014	ART	113	Lecture	1	B	B	Graded	3.00	Regular
Detail	2344	ENGLCOMP	200	Lecture	1	B	B	Graded	3.00	Regular
Detail	2107	ENGLLIT	210	Lecture	1	B	B	Graded	3.00	Regular
Detail	2051	PSYCH	130	Lecture	1	B	B	Graded	3.00	Regular

Student Grade Inquiry page

Print

Click to print the grade information.

Detail

Click to access the Class Details page, where you can view class information.

Viewing Term Statistics

Access the Terms Statistics page (Records and Enrollment, Student Term Information, Student Grades, Term Statistics).

See Also

[Chapter 37, "Viewing Class Enrollment Data," Viewing Term Statistics, page 882](#)

Auditing Grade Changes

This section provides an overview of grade change audits and discusses how to enter grade change audit search parameters.

Understanding Grade Change Audits

PeopleSoft Campus Solutions provides grade change audit functionality that captures and displays detailed information about grade changes made through online pages, batch processes, and SQL. Specifically, the system tracks and writes an audit record to the grade change audit table for each of these changes:

- Online and self-service changes to the GRADE_INPUT field.
- Batch changes to the GRADE_INPUT field on the Grade Lapse Process page.
- SQL changes to the Grade Input field.

The grade change audit table captures the entire PS_STDNT_ENRL record and stores an image of the record before and after any changes. The system dates and time stamps and also marks each record in the audit table as a before or after image.

Complete these steps to audit grade changes:

1. Enter the parameters that define your audit group on the Grade Change Audit page.
2. Select the View Changes Only check box to see only changes to original grades.
Clear the View Changes Only check box to see both original grades and subsequent grade changes.
3. Click the Search button to retrieve your results.
4. Review the results of your search on the Change Detail, Units and GPA, and Miscellaneous Details tabs.

Prerequisites

To record the grade changes that the Grade Change Audit functionality audits, your IT team must first install and execute delivered SQL trigger files.

See Supplemental Installation Guide link on the Campus Solutions 9.0 Documentation Home page on My Oracle Support (note ID 751540.1)

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Integrating Campus Solutions with Human Capital Management"

Page Used to Audit Grade Changes

Page Name	Definition Name	Navigation	Usage
Grade Change Audit	GRADE_AUDIT	Curriculum Management, Grading, Grade Change Audit, Grade Change Audit	Specify grade change audit search parameters and review detailed information about grade changes that match the selection criteria.

Entering Grade Change Audit Search Parameters

Access the Grade Change Audit page (Curriculum Management, Grading, Grade Change Audit, Grade Change Audit).

Grade Change Audit

ID: Beer,Dalelia
User ID:
Start Date:
End Date:
☐ **View Changes Only**

Change Detail

Units and GPA

Miscellaneous Details

User ID	ID	Date/Time	Action	Term	Class Nbr	Subject	Catalog	Grade	Grade In	Grade Dt
PS	SR0402	09/15/2004 10:18:47AM	After	0450	1084	MUSIC	102	A	A	09/15/2004
PS	SR0402	09/15/2004 10:18:47AM	Before	0450	1084	MUSIC	102	B	B	04/05/1999

Grade Change Audit page: Change Detail tab

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

ID

The ID of the student to audit. Leave this field blank to have the system retrieve all values for this field (wildcard).

User ID	The ID of the user to audit. Leave this field blank to have the system retrieve all values for this field (wildcard).
Start Date	Enter the earliest date to audit. Leave this field blank to have the system retrieve all values for this field (wildcard).
End Date	Enter the latest date to audit. Leave this field blank to have the system retrieve all values for this field (wildcard).
View Changes Only	Select this check box to have the system return only those records with an action of <i>After</i> . Clear this check box to have the system return records with an action of <i>Before</i> and <i>After</i> .
Search	Click to retrieve audit data. To refresh the data that the system returns, update the selection criteria and click the button again.
Note. After you click the Search button, the retrieval process begins. If the system finds records in the GRADE_AUDIT table within your search criteria, the system refreshes the data on the Change Detail tab. If the process returns no changes, the fields on the Change Detail tab remain blank.	
User ID	Displays the ID of the individual who made changes to the PS_STDNT_ENRL record.
ID	Displays the ID of the student whose grade changed.
Date/Time	Displays when a user made changes to the PS_STDNT_ENRL record.
Action	Displays the state of the change record. Values are: <i>Before</i> : The image of the record before it was updated. <i>After</i> : The image of the record after it was updated.

All remaining columns on the Units and GPA tab and the Miscellaneous Detail tab display a subset of columns from the Grade Audit table, which stores a snapshot of the student's record in the PS_STDNT_ENRL table.

See Also

Chapter 32, "Processing Class Enrollment Transactions," Processing Enrollment Transactions Through the Enrollment Component, page 770

Chapter 44

Graduating Students

This chapter discusses how to:

- Track graduation progress.
- Post degrees.
- Automate graduation processing and reporting.
- Audit degree changes.
- Apply for graduation through self service.

See Also

[Chapter 13, "Setting Up Degrees and Honors," page 305](#)

PeopleSoft Academic Advisement 9.0 PeopleBook, "Producing Academic Advisement Transcript Reports"

Tracking Graduation Progress

This section discusses how to:

- Track individual candidate progress.
- Review graduation status history.
- Update academic program for a group of students.
- Track candidate group progress.

Pages Used to Track Graduation Progress

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Graduation Tracking	SSR_STDNT_GRAD	Records and Enrollment, Graduation, Graduation Tracking	Determine if a student has completed all the requirements necessary to receive his or her degree.

Page Name	Definition Name	Navigation	Usage
Graduation Status History	SSR_STDGRD_HIST_SP	Click the View Status History button on the Graduation Tracking page.	View an audit trail of all graduation status changes to a student record.
Graduation Processing	SSR_RUNCTL_GRADRPT	Records and Enrollment, Graduation, Graduation Processing	Manage the degree checkout process for a group of students.
Graduation Tracking Batch	SSR_RUNCTL_GRADTRK	Records and Enrollment, Graduation, Graduation Tracking Batch	Create and update graduation tracking data for a group of students.

Track Individual Candidate Progress

Access the Graduation Tracking page (Records and Enrollment, Graduation, Graduation Tracking).

Graduation Tracking

Mary Fernwood
SRGR0001

Academic Career Undergraduate
Student Career Nbr 0

Academic Program Liberal Arts Undergraduate
Institution PeopleSoft University

Exp. Graduation Term 0660 2011 Spring
User ID PS

Degree BA Bachelor of Arts

Graduation Tracking

Graduation Review Status Applied
☐ Update Graduation Status

Status Date 03/08/2011

Last Modified On 03/08/2011 9:42:23AM
Updated By PS
[View Status History](#)

Academic Plan

Plan Seq	Acad Plan	Description	Acad Plan Type	Acad Subplan	Degree
10	PSYCH	Psychology	Major		Bachelor of Arts

Statistics
[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Cumulative Units

Term	Acad Level Projected	Taken for Progress	Passed for Progress	Taken GPA	Passed GPA	Taken Not GPA	Passed Not GPA	In Progress GPA	In Progress Not GPA
0660	Senior	114.000	99.000	99.000	99.000			15.000	

Graduation Tracking page: Cumulative Units tab

The sections that appear on this page are configured on the Institution Table page. The Academic Plan group box displays all plans for the student's career/student career number identified at the top of the page. If the student has more than one degree in the career/student career number, all plans appear under each degree.

The information displayed in the statistics section are from the student career term record that is less than or equal to the expected graduation term. The Cumulative Units tab displays a summary of the status of all units taken by the student in a term.

- Update Graduation Status

Select this check box to open a new Graduation Review Status field for entry of a new status.
- View Status History

Click this button to access the Graduation Status History page.

Graduation Tracking

Mary Fernwood

SRGR0001



Academic Career

Undergraduate

Student Career Nbr

0

Academic Program

Liberal Arts Undergraduate

Institution

PeopleSoft University

Exp. Graduation Term

0660 2011 Spring

User ID

PS

Degree

BA Bachelor of Arts

Graduation Tracking

Graduation Review Status

Applied

☐ Update Graduation Status

Status Date

03/08/2011



Last Modified On

03/08/2011 9:42:23AM

Updated By

PS

View Status History

Academic Plan

Plan Seq	Acad Plan	Description	Acad Plan Type	Acad Subplan	Degree
10	PSYCH	Psychology	Major		Bachelor of Arts

Statistics

Cumulative Units

Cumulative GPAs

Transfer Credit



Customize | Find | View All |   First 1 of 1 Last

Enrollment GPA	Transfer Credit GPA	Combined GPA
3.430	4.000	3.465

Graduation Tracking page: Cumulative GPAs tab

The Cumulative GPAs tab displays all GPAs for a student.

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Graduation Tracking

Mary Fernwood SRGR0001   

Academic Career Undergraduate **Student Career Nbr** 0
Academic Program Liberal Arts Undergraduate **Institution** PeopleSoft University
Exp. Graduation Term 0660 2011 Spring **User ID** PS
Degree BA Bachelor of Arts

Graduation Tracking

Graduation Review Status Applied ☐ **Update Graduation Status**
Status Date 03/08/2011 
Last Modified On 03/08/2011 9:42:23AM **Updated By** PS [View Status History](#)

Academic Plan

Plan Seq	Acad Plan	Description	Acad Plan Type	Acad Subplan	Degree
10	PSYCH	Psychology	Major		Bachelor of Arts

Statistics [Customize](#) | [Find](#) | [View All](#) |   First 1 of 1 Last

[Cumulative Units](#) | [Cumulative GPAs](#) | [Transfer Credit](#) 

Units Taken Toward GPA	Total Transferred	Total From Test Credit	Total from Other Credit
6.000		6.000	6.000

Graduation Tracking page: Transfer Credit tab

The Transfer Credit tab displays posted units for transfer, test and other credit.

Enrollment

Select Display Option: ☒ Limited View ☐ Show All

[Customize](#) | [Find](#) | [View All](#) |   First 1-5 of 5 Last

Class Information | [Class Info 2](#) | [Enrollment Status](#) 

Term	Class Nbr	Subject	Catalog Nbr	Description	Official Grade	Grad Note	Description
2011 Spring	1524	PSYCH	274	Soc Psy			
2011 Spring	1084	PSYCH	320	Opt Aging			
2011 Spring	1416	PSYCH	410	Race Econ Dev			
2011 Spring	1094	PSYCH	440	Behv Path			
2011 Spring	1096	PSYCH	500	Anm Behav			

Graduation Tracking page: Class Information tab

Select Display Option Select *Show All* to display all enrollments, or select *Limited View* to display only ungraded ones.

The Class Information tab displays classes that do not have a grade or have a grade that is set up as an incomplete grade for which the student is enrolled. If a class needs to be tracked during the graduation review process, enter a Grad Note on that class. If the class is dropped (after the drop retain date) or once the class is graded, it still appears in this section, due to the Grad Note.

▼ Enrollment		
Select Display Option: ☒ Limited View ☐ Show All		
Customize Find View All First 1-5 of 5 Last		
Class Information	Class Info 2	Enrollment Status
Course ID	Class Section	Academic Career
003024	1	Undergrad
003030	1	Undergrad
003046	2	Undergrad
003052	1	Undergrad
003062	1	Undergrad

Graduation Tracking page: Class Info 2 tab

▼ Enrollment											
Select Display Option: ☒ Limited View ☐ Show All											
Customize Find View All First 1-5 of 5 Last											
Class Information	Class Info 2	Enrollment Status									
Student Enrollment Status	Last Enrl Action Reason	Enrollment Add Date	Enrollment Drop Date	Grade Date	Repeat Code	Campus	Grading Basis	Requirement Designation	Requirement Designation Option	Requirement Designation Grade	Acad Prog
Enrolled		12/22/2010				MAIN	GRD				LAU
Enrolled		12/22/2010				MAIN	GRD				LAU
Enrolled		12/22/2010				MAIN	GRD				LAU
Enrolled		12/22/2010				MAIN	GRD				LAU
Enrolled		12/22/2010				MAIN	GRD				LAU

Graduation Tracking page: Enrollment Status tab

▼ Milestones					
Milestone Nbr	Milestone	Description	Milestone Complete	How Completed	Date Completed
10	THESIS	Thesis	Completed	Submitted	12/20/2010

▼ Graduation Notes	
Sequence	10
Graduation Note	
Comment	

▼ Honors		
Sequence	Honors Code	Formal Description
10		

▼ Special GPA						
Term	GPA Type	Short Description	GPA	Academic Program	Academic Plan	Academic Sub-Plan
0660	PLNC	Plan Cum	3.100			
0660	PRGC	PROG CUM	3.080			

Graduation Tracking page: Milestones, Graduation Notes, Honors, Special GPA

Enter any free-form text in the Comment field for the graduation reviewer. If the student is eligible for any honors at graduation, enter an Honors Code.

▼ Course Credits					
Transfer Model	Source Information	Statistics			
Model Nbr	Articulation Term	Description	Model Status	Descr	Descr
1	0630	2009 Fall	Posted	Liberal Arts Undergraduate	

▼ Test Credits					
Transfer Model	Statistics				
Model Nbr	Articulation Term	Description	Model Status	Description	Description
1	0590	2007 Fall	Posted	Liberal Arts Undergraduate	

▼ Other Credits					
Transfer Model	Statistics				
Model Nbr	Articulation Term	Description	Model Status	Description	Description
1	0630	2009 Fall	Posted	Liberal Arts Undergraduate	

Graduation Tracking page: Transfer Model tabs

▼ Course Credits							Customize View All  First 1 of 1 Last
Transfer Model		Source Information		Statistics 			
Model Nbr	Articulation Term	Credit Source Type	External Org ID	Descr	Source Institution	Apply Agreement	
1	0630	External	000010147		Santa Monica City College	Y	

▼ Test Credits						Customize View All  First 1 of 1 Last
Transfer Model		Statistics 				
Model Nbr	Articulation Term	Description	Model Status	Description	Description	
1	0590	2007 Fall	Posted	Liberal Arts Undergraduate		

▼ Other Credits						Customize View All  First 1 of 1 Last
Transfer Model		Statistics 				
Model Nbr	Articulation Term	Description	Model Status	Description	Description	
1	0630	2009 Fall	Posted	Liberal Arts Undergraduate		

Graduation Tracking page: Source Information tab

▼ Course Credits										Customize View All  First 1 of 1 Last
Transfer Model		Source Information		Statistics 						
Model Nbr	Articulation Term	Units Taken	Units Transferred	Transfer Taken for GPA	Transfer Taken Not for GPA	Transfer Passed for GPA	Transfer Passed Not for GPA	Transfer Grade Points	Transfer GPA	
1	0630			6.000		6.000		24.000	4.000	

▼ Test Credits										Customize View All  First 1 of 1 Last
Transfer Model		Statistics 								
Model Nbr	Articulation Term	Units Transferred	Transfer Taken for GPA	Transfer Taken Not for GPA	Transfer Passed for GPA	Transfer Passed Not for GPA	Transfer Grade Points	Transfer GPA	Posted Date	
1	0590	6.000							12/22/2010	

▼ Other Credits										Customize View All  First 1 of 1 Last
Transfer Model		Statistics 								
Model Nbr	Articulation Term	Units Transferred	Transfer Taken for GPA	Transfer Taken Not for GPA	Transfer Passed for GPA	Transfer Passed Not for GPA	Transfer Grade Points	Transfer GPA	Posted Date	
1	0630	6.000							12/22/2010	

Graduation Tracking page: Statistics tabs

Reviewing Graduation Status History

Access the Graduation Status History page (Click the View Status History button on the Graduation Tracking page).

Graduation Status History								
	Date/Time Reviewed	Degree	Description	Previous Graduation Status	New Grad Status	Previous Status Date	New Status Date	Updated By
1	02/04/2011 11:50:37AM	BA	Bachelor of Arts		Applied for Graduation		02/04/2011	PS

Graduation Status History page

Updating Academic Program for a Group of Students

Access the Graduation Processing page (Records and Enrollment, Graduation, Graduation Processing).

Graduation Processing

Run Control ID: Batch

[Report Manager](#) [Process Monitor](#)

Run

Academic Institution

PeopleSoft University

Academic Career

Undergraduate

Population Selection

☒ Population Selection

Selection Tool:

PS Query

[Edit Prompts](#)

[Load Selection Results](#)

Query Name:

VW_SSR_GRAD_PROG2

[Launch Query Manager](#)

[Preview Selection Results](#)

Selection Results

[Add Students](#) [Clear List](#)

Customize | Find | First 1 of 1 Last

Student ID	Name	Acad Prog	Primary Plan	Degree	Degree Checkout Status	Expected Graduation Term	Degree GPA	Degree Honors 1	Degree Honors 2	Exclude
1										☐

Graduation Process Action

Graduation Process Action

Update All

Graduation Processing page (1 of 2)

Program/Degree Update Options			
New Degree Checkout Status	Degree Awarded		
Action Reason	Successful Completion		
Completion Term	0650 2010 Fall		
Program Effective Date	User Date	User Defined Date	02/15/2011
Confer Date Option	User Date	Confer Date	02/15/2011
Update Degree Values			
Degree GPA	No GPA	Update Degree Values	
Degree Honors 1			
Degree Honors 2			
Report Options			
☐ Create Transcript Request		☐ Create Academic Advisement Req	

Graduation Processing page (2 of 2)

This page enables you to update academic program information for multiple students; you can either click the Add Students link to enter student IDs or create a list using the Population Selection process.

Select the Population Selection option to use flexible methods to load audience data into the system. This group box expands when the Population Selection process is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (such as PS Query) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Load Selection Results

Select this link to populate the Selection Results section with the student list created during the Population Selection process. At this point, you can exclude a student. When you are ready to award the degree, you can update the Degree GPA and the Honors 1 and Honors 2 fields using the Update Degree Values. The fields can also be manually updated.

Graduation Process Action

Select an action: *Degree Checkout Status*, *Expected Graduation Status*, *Reports Only - Transcripts/AA*, or *Update All*. These are delivered values.

New Degree Checkout Status	Select a status to be applied to the IDs: <i>Applied for Graduation, Approved, Denied, Needs to Finish Pending Work, Program in Review, Review in Progress, Withdrawn, Degree Awarded, and Eligible for Graduation.</i> When the degree checkout status is <i>Degree Awarded</i>, the <i>Action Reason, Completion Term, Program Effective Date, and Confer Date Option</i> fields become available. For all other degree checkout status values, the <i>Action Reason, New Expected Grad Term, and Expected Grad Term Option</i> fields become available.
Program Effective Date, Confer Date Option	Values for these fields are: <i>Confer Dt (Confer Date), Today, or User Date.</i> The <i>Confer Dt</i> is the date defined in the Academic Calendar.
Create Transcript Request	Select this check box to create transcript requests for the population defined. You must also select the transcript type.
Create Academic Advisement Req	Select this check box to create an academic advisement report for the population selected. You must also select a report identifier, report date, as of date and advisement report type.

When you click the Run button, the system takes the student group created using Population Selection and inserts a new row into the Academic Program table for each student; depending on the degree checkout status, either a new data row will be inserted or a completion row (Degree Awarded) and the action reason selected on this page.

Tracking Candidate Group Progress

Access the Graduation Tracking Batch page (Records and Enrollment, Graduation, Graduation Tracking Batch).

Graduation Tracking Batch

Run Control ID: [Report Manager](#) [Process Monitor](#) [Run](#)

*Academic Institution:

*Academic Career:

Population Selection

Selection Tool: [Edit Prompts](#)

Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

Graduation Tracking Options

*Graduation Review Status:

Status Date:

Graduation Review Notes

[Find](#) | [View All](#) First of 1 [Last](#)

Sequence number:

Graduation Note:

Note:

Graduation Tracking Batch page

Use the Population Selection process to create a graduation tracking row for a student or update an existing row. Graduation Review Status values are defined by your institution.

To add graduation review notes to students' graduation tracking, select a Graduation Review Note and a text note.

Posting Degrees

The process of posting degrees requires that you update student program records and, if necessary, report and audit degree changes. This section provides an overview of the degree posting process, lists prerequisites, and discusses how to:

- Complete the student's program.
- Verify and update student degree data.
- View and modify degree data.
- View and modify degree honors data.
- View and modify degree plan data.

- View and modify degree subplan data.

Understanding the Degree Posting Process

To post a degree:

1. Insert a new row and enter a program action of *Completion of Program* on the Student Program page.
This sets the Degree Checkout Stat (degree checkout status) field on the Student Degrees page to *Approved*.
2. (Optional) On the Student Degrees page, verify the completion term, specify degree honors, and enter a degree grade point average (GPA).
3. Click the Update Degrees button on the Student Program page to post the degree.
This sets the Degree Checkout Stat field to *Awarded*.
4. (Optional) When the process finishes, you can view and edit posted degrees through the Student Degrees component.
 - a. View and modify degree honors information on the Degree Honors page.
 - b. View and modify degree plan information on the Degree Plan page.
 - c. View and modify subplan information on the Degree Sub-Plan page.
5. (Optional) Use the Degree Change Audit component to audit any degree status changes.
See [Chapter 44, "Graduating Students," Auditing Degree Changes, page 1098](#).

Prerequisites

Before you can post a student's degree, you must:

- Define degrees and degree honors.
- Assign degrees to academic plans.
- Matriculate the student, or confirm that the student has a history of matriculation.

Pages Used to Post Degrees

Page Name	Definition Name	Navigation	Usage
Student Program	STDNT_PROG	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program	Insert a new row and update the Program Action field value to a status of <i>Completion of Program</i> .

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Degrees	STDNT_DEGR	Records and Enrollment, Career and Program Information, Student Program/Plan, Student Degrees	Verify and update a student's completion term, degree honors, degree GPA, and degree checkout status.
Degree	ACAD_DEGREE	Records and Enrollment, Graduation, Student Degrees, Degree	View and modify posted degree data.
Degree Honors	ACAD_DEGREE_HONORS	Records and Enrollment, Graduation, Student Degrees, Degree Honors	View and modify degree honors information, which is particularly useful when you want to award more than two honors code values to a student (there is a limit of two honors codes on the Student Degrees page).
Degree Plan	ACAD_DEGREE_PLAN	Records and Enrollment, Graduation, Student Degrees, Degree Plan	View and modify degree plan information.
Degree Sub-Plan	ACAD_DEGREE_SUBPLN	Records and Enrollment, Graduation, Student Degrees, Degree Sub-Plan	View and modify subplan information.

Completing the Student's Program

Access the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program).

Program Action

Insert a new row in this field, and select a value of *Completion of Program*.

Note. If you must revoke a degree after it has been awarded, insert a row and enter a program action of *Revoke Degree*. The system automatically updates the degree tables.

See Also

[Chapter 26, "Managing Student Programs, Plans, and Subplans," Pages Used to Manage Student Program Stacks, page 650](#)

Verifying and Updating Student Degree Data

Access the Student Degrees page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Degrees).

Student Program		Student Plan		Student Sub-Plan		Student Attributes		Student Degrees	
Albert Vargas				AA0023					
Academic Career:		Graduate		Student Career Nbr:		0			
Find View All First 1 of 2 Last									
Status:		Completed Program		Admit Term:		1997 Fall			
Effective Date:		09/14/2004		Effective Sequence:		1			
Program Action:		Completion of Program		Action Date:		09/14/2004			
Action Reason:									
Academic Program:		Graduate Liberal Arts Programs							
Requirement Term:		1997 Fall							
Degree Checkout Stat:		Approved				Update Degrees			
Completion Term:		0450		Degree GPA:		3.45			
Degree Honors 1:									
Degree Honors 2:									

Student Degrees page

Degree Checkout Stat (degree checkout status)

Throughout a student's degree history, you can progressively update the values in this field. Values are: *Applied*, *Approved*, *Awarded*, *Denied*, *In review*, *Pending*, and *Withdrawn*.

When you select the status of *Completion of Program* in the Program Action field on the Student Program page, the system populates the Degree Checkout Stat field here to *Approved*; you cannot modify this value. The system changes this status from *Approved* to *Awarded* when you click the Update Degrees button. When you click this button, all fields on this page become unavailable. You must complete future edits on the Degree page, or you can revoke the degree altogether by inserting a new row in the Program Action field on the Student Program page and selecting a value of *Revoke Degree*.

Completion Term

Enter the term in which the degree is awarded.

Degree Honors 1 and Degree Honors 2

If applicable, select a value from the list of values that you defined on the Degree Honors Table page.

Degree GPA (degree grade point average)

Enter the degree GPA. When you click the Update Degrees button, the GPA and degree honors are stored on the student's degree records.

Although the system does not calculate this value, you can create an academic advising report to assist you with calculating the value.

Viewing and Modifying Degree Data

Access the Degree page (Records and Enrollment, Graduation, Student Degrees, Degree).

Degree		Degree Honors		Degree Plan		Degree Sub-Plan	
Albert Vargas				AA0023			
Find View All First 1 of 1 Last							
*Degree Nbr:	01						
*Degree:	MA	Master of Arts					
*Institution:	PSUNV	PeopleSoft University					
Primary Career:	GRAD	Graduate					
*Completion Term:	0450	2001 Fall					
*Confer Date:	12/30/2001						
*Degree Status:	Awarded						
Degree Status Date:	09/14/2004						
Degree GPA:	3.650						
Honors Prefix		Rank/Size					
Prefix:		Class Rank:			Of		
Suffix:							

Degree page

Degree Number

The system generates the degree number, which is unique for each degree that you assign to a student.

Degree and Institution

These values appear by default from the Student Degrees page. You cannot override these values after degree posting is complete. The degree appears on the transcript if you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.

Primary Career, Completion Term, Confer Date, Degree Status and Degree GPA

These values appear by default from the Student Degree page. The Confer Date defaults to the Confer Date for student's completion term. You can override the values.

Degree Status Date

This date appears by default from the effective date for the *Completion* row on the Student Program page.

Prefix and Suffix

Select from those prefixes and suffixes that you defined on the Degree Honors Table page. Only those honors with a type of *Degree Prefix* and *Degree Suffix*, respectively, are available. The prefix and suffix appears with the degree description on the transcript if you specify a *Local Degrees* print area on the Transcript Type - Degrees/Program page.

Class Rank and Of

Enter class rank values for the student's degree. The class rank information appears with the degree description on the transcript if you specify a *Local Degrees* print area and select the Print Degree Rank check box on the Transcript Type - Degrees/Program page.

Viewing and Modifying Degree Honors Data

Access the Degree Honors page (Records and Enrollment, Graduation, Student Degrees, Degree Honors).

DegreeDegree HonorsDegree PlanDegree Sub-Plan

Albert VargasAA0023

Find | View AllFirst1 of 1Last

Student Degree Nbr:01Master of Arts

*Honors Number	*Honors Code	Award Date	Print on Diploma	Print on Transcript
1	CUM	Cum Laude12/30/2001	☒	☒

Degree Honors page

Honors Number	The system generates the honors number and uses this value for sequencing honors on the transcript.
Honors Code	If available, this value appears by default from the Student Degrees page. Add rows to select additional honors for the degree. Honors values are defined on the Degree Honors Table page.
Award Date	This value appears by default from the Confer Date field on the Degree page. See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i> , "Defining Traditional Academic Calendars," Setting Up Term Landmark Dates.
Print on Diploma	No programming is tied to this check box.
Print on Transcript	Select this check box to display the honors value on the student's transcript. For the degree honors information to appear on the transcript, you must also specify a <i>Local Degrees</i> print area and select the Print Degree Honors check box on the Transcript Type- Degrees/Program page.

Warning! Changes to this page do not post to a student's record. You must post honors to the student's record by running the posting process using the Academic Standing/Honors and Awards page. When you run the process, select the Calculate Honors & Awards check box to calculate honors and awards.

Viewing and Modifying Degree Plan Data

Access the Degree Plan page (Records and Enrollment, Graduation, Student Degrees, Degree Plan).

Degree	Degree Honors	Degree Plan	Degree Sub-Plan
Albert Vargas		AA0023	
Find View All First 1 of 1 Last			
Student Degree Nbr: 01 Master of Arts			
Find View All First 1 of 1 Last			
Degree Plan Detail + -			
*Plan Seq:	10	*Degr Stat:	Awarded
Career:	GRAD Graduate	Degr Dt:	09/14/2004
Career Nbr:	0	Plan Type:	Major
Acad Plan:	TEACH-MA Teaching-MA		
Honors Detail			
☒ Override			
Honors Prefix	Transcript Description	Honors Suffix	
	Master of Arts in Teaching		
	Diploma Description		
	Master of Arts in Teaching - Elementary Education Concentration		
Plan GPA			
Plan GPA:			
Plan Rank:		Of	

Degree Plan page

Plan Seq (plan sequence)	This value defines the primacy of the plan within the program.
Career	The career to which the degree is assigned.
Career Nbr (career number)	The specific career number to which the degree is assigned. The system increments this number for each active program in the same career.
Acad Plan (academic plan)	The academic plan to which the degree is assigned.
Degr Stat (degree status)	The status of the degree: <i>Awarded</i> and <i>Revoked</i> . You can override the degree status. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Degr Dt (degree date)	The effective date from the Student Program page, where the program action is <i>Completion of Program</i> .

Plan Type	The type of plan, as defined on the Academic Plan Table page.
Override	Select this check box to revise the transcript description and the diploma description.
Transcript Description	The description of the plan degree to appear on the transcript. The plan transcript description appears on transcripts where you specify a <i>Local Degrees</i> print area on the Transcript Type - Degrees/Program page.
Diploma Description	No programming is tied to this field.
Honors Prefix	Specify an honors prefix for this plan degree, if any. Honors prefix values are defined with a type of <i>Degree Plan Prefix</i> on the Degree Honors Table page. The plan honors prefix appears next to the plan degree on transcripts where you specify a <i>Local Degrees</i> print area on the Transcript Type - Degrees/Program page.
Honors Suffix	Specify an honors suffix for this plan degree, if any. Honors suffix values are defined with a type of <i>Degree Plan Suffix</i> on the Degree Honors Table page. The plan honors suffix appears next to the plan degree on transcripts where you specify a <i>Local Degrees</i> print area on the Transcript Type - Degrees/Program page.
Plan GPA (plan grade point average)	The system does not calculate the plan GPA value, although you can create an academic advising report to assist you with the calculation. The plan GPA appears with the plan degree on transcripts where you specify a <i>Local Degrees</i> print area and select the Print Degree Plan GPA check box on the Transcript Type - Degrees/Program page.
Plan Rank andOf	Enter plan rank values for the student's plan. The plan rank information appears with the plan degree description on the transcript if you specify a <i>Local Degrees</i> print area and select the Print Degree Plan Rank check box on the Transcript Type - Degrees/Program page.

Viewing and Modifying Degree Subplan Data

Access the Degree Sub-Plan page (Records and Enrollment, Graduation, Student Degrees, Degree Sub-Plan).

DegreeDegree HonorsDegree PlanDegree Sub-Plan

Albert VargasAA0023

Find | View AllFirst1 of 1Last

Student Degree Nbr:01Master of Arts

Find | View AllFirst1 of 1Last

Academic Plan:Teaching-MAGraduate

Academic Plan Type:Major

Find | View AllFirst1 of 1Last

*Academic Sub-Plan:*Sub-Plan Seq:10

Honors Prefix

☐ Override

Honors Prefix

Transcript Description

Honors Suffix

Diploma Description

Degree Sub-Plan page

Academic Sub-Plan	The academic subplan associated with the plan degree.
Sub-Plan Seq(subplan sequence)	The sequence number for the subplan. This value defines the primacy of the subplan within the plan.
Override	Select this check box to revise the transcript description and the diploma description.
Transcript Description	The subplan transcript description appears on transcripts where you specify a <i>Local Degrees</i> print area and select the Print Degree Sub-Plan check box on the Transcript Type - Degrees/Program page.
Diploma Description	No programming is tied to this field.
Honors Prefix	Specify an honors prefix for this subplan degree, if any. Honors prefix values are defined with a type of <i>Degree Sub-Plan Prefix</i> on the Degree Honors Table page. The subplan honors prefix appears next to the subplan degree on transcripts where you specify a <i>Local Degrees</i> print area and select the Print Sub-Plan check box on the Transcript Type - Degrees/Program page.

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Honors Suffix

Specify an honors prefix for this subplan degree, if any. Honors suffix values are defined with a type of *Degree Sub-Plan Suffix* on the Degree Honors Table page. The subplan honors suffix appears next to the subplan degree on transcripts where you specify a *Local Degrees* print area and select the Print Sub-Plan check box on the Transcript Type - Degrees/Program page.

Automating Graduation Processing and Reporting

The Graduation Processing and Reporting feature, which is run through the Graduation Reporting component, facilitates the degree checkout process. The feature works as a part of core functionality, and it works as an integrated complement to the PeopleSoft Campus Self Service application (through which students can use self-service pages to apply for graduation).

Using the Graduation Processing and Reporting feature, you can dynamically define a student population, and for this population you can:

- Update degree checkout status values (from a valid status that you specify to another status that you specify).
- Create requests for transcripts, degree audits, and special advisement reports.
- Generate a graduation report.

This section provides an overview of the graduation reporting process, lists prerequisites, and discusses how to:

- Enter graduation report parameters.
- Retrieve the student population.

Understanding the Graduation Reporting Process

To run the graduation reporting process:

1. Select the Student Population check box, and enter your student population selection criteria on the Graduation Reporting page.
2. Click the Run button to run the Graduation Reporting process.
3. Click the Fetch button on the Selection Results page in order to populate the page with your resultant student population.
4. Delete rows to remove students that you do not want to process.

Insert rows to add students that did not match your parameters, but whom you want to process.

5. Navigate to the Graduation Reporting page and clear the Student Population check box.

6. Select the run option check boxes and their respective data.

For example, select the Update Program and Degrees check box, and provide the information required in the Program/Degree Update Options group box, including the new degree checkout status, completion term, and program effective date.

7. Click the Run button and run the Graduation Reporting process.

If you run a report, you should use a type of *Web* and a format of *PDF*.

8. After the process finishes, you can do the following:

- a. Navigate to the Transcript Generation page to generate transcripts (use the transcript request number on the Graduation Reporting page).
- b. Navigate to the Student Degrees page or the Degrees page to view updated degree checkout status values.
- c. Review the Graduation report.

Prerequisites

If you plan to create transcript requests, you must first define transcript types in the Transcript Type component.

See Also

Chapter 14, "Setting Up Transcripts," Defining Transcript Types, page 320

Pages Used to Automate Graduation Processing and Reporting

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Graduation Report	RUNCTL_GRAD_RPT	Records and Enrollment, Graduation, Graduation Report, Graduation Report	Enter graduation report parameters: define a population of students for which you can update degree checkout status values, create transcript requests, and generate graduation reports. For example, when a student applies for graduation through the self-service Apply for Graduation feature, the system sets that student's degree checkout status to <i>Applied</i>. You can use the Graduation Reporting component to set all students with a status of <i>Applied</i> to <i>In Review</i>.
Selection Results	RUNCTL_GRAD_RPT2	Records and Enrollment, Graduation, Graduation Report, Selection Results	Retrieve the results of your population query, add or delete students, and edit the degree GPA and degree honors for each student.

Entering Graduation Report Parameters

Access the Graduation Report page (Records and Enrollment, Graduation, Graduation Report, Graduation Report).

Graduation Report		Selection Results	
Run Control ID: ASG_REPORT		Report Manager Process Monitor	Run
Run Options			
☐ Select Population ☒ Update Programs and Degrees ☐ Create Transcript Request ☐ Generate Report			
Selection Criteria			
'Academic Institution:	PSUNV	PeopleSoft University	
Academic Career:			
Degree Checkout Status:			
Academic Program 1:			
Academic Program 2:			
Academic Program 3:			
Expected Graduation Term:			
Program/Degree Update Options			
New Degree Checkout Status:	Awarded		
Completion Term:	0630		
Program Effective Date:	User Defined	User Defined Date:	12/11/2009
Transcript Request Options			
Transcript Request Nbr:		☒ Flexible Transcript	
Transcript Type:			

Graduation Report page

Run Options

Select Population

The first step to using the Graduation Reporting component is entering selection criteria and fetching a student population. Select this check box to enable the fields that define your student population in the Selection Criteria group box. After you enter all of your parameters, click the Run button to run the Graduation Reporting process. View your student population on the Selection Results page, where you can add or delete students.

Note. The process does not select students with a current program action of Admission Revocation, Defer Enrollment, Discontinuation, Suspension, or Administrative Withdrawal.

Update Programs and Degrees	After you enter your selection criteria and fetch your population, select this check box to enable the fields in the Program/Degrees Update Options group box and enter your update data. After you specify your update data, click the Run button to run the Graduation Reporting process to update program and degree information for the students in your population. Specifically, this process updates for all students in your population the student career term records with the values from: • The Program/Degree Update Options group box on this page. • The Degree GPA and Degree Honors fields on the Selection Results page.
Create Transcript Request	After you enter your selection criteria and fetch your population, select this check box to enable the fields in the Transcript Request Options group box and to enter your transcript type data. After you specify your data, run the Graduation Reporting process to create a batch transcript request for the students in your population. Next, generate the transcripts on the Transcript Generation page.
Generate Report	After you enter your selection criteria and fetch your population, select this check box and run the process to create a report that highlights all of the graduation data for the students in your population.
Selection Criteria	
Academic Institution	The academic institution of the students you want to fetch.
Academic Career	The academic career of the students you want to fetch.
Degree Checkout Status	The current degree checkout status of the students to fetch: <i>Applied, Approved, Denied, In Review, Pending, or Withdrawn.</i>
Academic Program 1, Academic Program 2, and Academic Program 3	You can enter up to three academic programs within the career you specify to identify the students you want to fetch. If any fields are left blank, the system fetches all students in the career you specify.
Expected Graduation Term	The expected graduation term of the students to fetch. The system verifies this value against the value in the Expected Grad Term (expected graduation term) field on the Student Program page. This field is optional.

Program/Degree Update Options

New Degree Checkout Status	When you select the Update Programs and Degrees check box, the New Degree Checkout Status field becomes available. Specify the degree checkout status that you want to assign to all students in your population: <i>Approved</i>, <i>Awarded</i>, <i>Denied</i>, <i>In review</i>, <i>Pending</i>, or <i>Withdrawn</i>. For a new checkout status of <i>Awarded</i>, the system inserts a new effective-dated row on the Student Program page with a program action of <i>Completion of Program</i>. For all other checkout status values, the system inserts a new effective-dated row on the Student Program page with a program action of <i>Data Change</i>. The system does not specify a program action reason.
Completion Term	When you select a New Degree Checkout Status field value of <i>Awarded</i>, you must specify the completion term that you want the system to assign to students in your population.
Program Effective Date	The field becomes available when you select the New Degree Checkout Status field value of <i>Awarded</i>. Select the value that you want assigned as the effective date for the student's academic program upon awarding the student's degree (that is, upon setting the program action to <i>Completed</i> and the Degree Checkout Status to <i>Awarded</i>.) Values are: <i>Confer Date</i>: Select to use the confer date (defined on the academic calendar) as the student's program completion effective date. If, however, the confer date is prior to the current program effective date, the process will assign today's date as the program effective date, not the confer date. For example, the student applied for graduation on September 1, 2009 and you are trying to confer the degree for a prior term (such as Spring 2009); the process will assign today's date (the system date) as the student's academic program effective date. <i>Today's Date</i>: This is the default value whereby the process assigns today's date (the system date) as the program effective date. If the current program effective date is also today's date, then the process will assign a new effective sequence number with today's date. For example, if the student applies for graduation today, and you run the process to award the degree with today's date, the program effective date will remain today's date and the process will insert an incremental effective sequence with the number of "2." <i>User Defined</i>: Select this value if you want to define the date that should be used as the program effective date. Then select a date in the User Defined Date field.
User Defined Date	If you select the Program Effective Date field value of <i>User Defined</i>, select a date. Note. If the user-defined date is prior to the current program effective date, the process will assign today's date as the program effective date, not the user-defined date.

Transcript Request Options

Elements in this group box are available when you select the Create Transcript Request check box.

Transcript Request Nbr (transcript request number)	The system generates and displays the number of your transcript request after you specify your transcript options and run the Graduation Reporting process. Use this number to generate transcripts on the Transcript Generation page.
Transcript Type	Specify the type of transcript to create for all students in your population.
Transcript default as of date	When you select a transcript type that is also an advising report (special or standard), this field becomes available. A value appears by default from the Transcript Default Date field on the Installation Student Administration page. You can override it.
Database Report	When you select a transcript type that is also an advising report (special or standard), this check box becomes available. Select this check box to create a transcript request where the results of the advising report populate the analysis database tables.

See Also

PeopleSoft Academic Advisement 9.0 PeopleBook, "Using the Analysis Database to Create User Configurable Reports," Understanding the Analysis Database

Retrieving the Student Population

Access the Selection Results page (Records and Enrollment, Graduation, Graduation Report, Selection Results).

Graduation Report		Selection Results	
Run Control ID:	PS	Report Manager	Process Monitor
		Run	
Academic Institution:	PSUNV	PeopleSoft University	Fetch
Academic Career:	UGRD	Undergraduate	
Add a Student			

Customize Find First 1-2 of 2 Last										
	Student ID	Name	Academic Program	Primary Academic Plan	Degree	Degree Checkout Status	New Degree Checkout Status	Degree GPA	Degree Honors 1	Degree Honors 2
1	SR13469	Lewis Graham	CE0EE	UNDECL-UG		Applied				
2	SR13470	Graham Pollock	CE0EE	UNDECL-UG		Applied				

Selection Results page

Fetch	Click to populate the page with your student population. If no students appear, either no students match your selection criteria, or you did not run the Graduation Reporting process.
Add a Student	Click to access the Add Student page where you can search for other student IDs within the career that you have specified. Only students that are active in their program are available.
Student ID	The ID of the student in the population.
Name	The name of the student in the population.
Academic Program	The academic program of the student in the population. If a student is active in more than one program in the career you specify, the selection returns all instances. You can delete program instances as necessary.
Primary Academic Plan	The primary academic plan of the student.
Degree	The degree that is associated with the program and primary plan of the student.
Degree Checkout Status	The student's degree checkout status prior to the update degree checkout status process. The system reads this value from the Student Degrees page.
New Degree Checkout Status	The student's degree checkout status of the student after the update degree checkout status process. The system reads this value from the Student Degrees page.
Degree GPA (degree grade point average)	Enter a degree GPA on one of three pages: the Selection Results page (prior to program completion/degree checkout status of <i>Awarded</i>), the Student Degrees page (prior to program completion or degree checkout status of <i>Awarded</i>), or the Degrees page (after program completion).

Degree Honors 1 and Degree Honors 2

The student's degree honors for this degree. The values appears from the Student Degrees page.

Enter degree honors on one of three pages: the Selection Results page (prior to program completion/degree checkout status of *Awarded*), the Student Degrees page (prior to program completion/degree checkout status of *Awarded*), or the Degrees page (after program completion).

Auditing Degree Changes

This section provides an overview of degree change audits, lists prerequisites, and discusses how to:

- Enter degree change audit search parameters.
- View degree change audit results.
- View degree honors change audit results.
- View degree plan change audit results.
- View degree subplan change audit results.

Understanding Degree Change Audits

Degrees are among the most sensitive data within the Student Records application. As such, the PeopleSoft system offers Degree Change Audit functionality that captures and displays detailed information about student degree postings or changes to postings. Changes include online changes to the Student Degrees page that occur when you click the Update Degrees button on the Student Degrees page and changes to any of the pages in the Student Degrees component. Inserts, updates, or deletions on these pages cause the system to write an audit record to the degree change audit table. The degree change audit table captures the entire record for ACAD_DEGR, ACAD_DEGR_HONS, ACAD_DEGR_PLAN, and ACAD_DEGR_SPLN, storing an image of each record before and after any change. The system date/time stamps and marks each record in the audit table as an "insert" or "delete," or as a "before" or "after" in the case of updates.

Use the Degree Change Audit component to search your database for details about degree changes. An option on the Search Criteria page enables you to filter out the "before" image.

Prerequisites

To record the degree changes that the Degree Change Audit functionality audits, your IT team must first install and execute delivered SQL trigger files.

See Supplemental Installation Guide link on the Campus Solutions 9.0 Documentation Home page on My Oracle Support (note ID 751540.1)

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Integrating Campus Solutions with Human Capital Management."

To view degree changes, you must first click the Search button on the Search Criteria page.

Pages Used to Audit Degree Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Degree Change Audit - Search Criteria	DEGREE_AUDIT	Records and Enrollment, Graduation, Degree Change Audit, Search Criteria	Define your degree change audit search parameters. All of the fields on this page are optional.
Degree	AUD_ACAD_DEGR	Records and Enrollment, Graduation, Degree Change Audit, Degree	Review detailed information about degree changes that match the selection criteria specified on the Search Criteria page. The elements on this page are the same as those found on the Degree page.
Degree Honors	AUD_ACAD_DEGR_H	Records and Enrollment, Graduation, Degree Change Audit, Degree Honors	Review detailed information about changes to degree honors that match the selection criteria specified on the Search Criteria page.
Degree Plan	AUD_ACAD_DEGR_P	Records and Enrollment, Graduation, Degree Change Audit, Degree Plan	Review detailed information about degree plan changes that match the selection criteria specified on the Search Criteria page.
Degree Subplan	AUD_ACAD_DEGR_S	Records and Enrollment, Graduation, Degree Change Audit, Degree Subplan	Review detailed information about degree subplan changes that match the selection criteria specified on the Search Criteria page. The elements of all four tabs on this page are the same as those found on the Degree Sub-Plan page.

Entering Degree Change Audit Search Parameters

Access the Degree Change Audit - Search Criteria page (Records and Enrollment, Graduation, Degree Change Audit, Search Criteria).

Search Criteria

Degree

Degree Honors

Degree Plan

Degree Subplan

ID:

User ID:

Start Date:

09/15/2004

End Date:

☐ View Changes Only

Search

Degree Change Audit - Search Criteria page

ID	The ID for the student who you want to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
User ID	The ID for the user who you want to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
Start Date	The earliest date to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
End Date	The latest date to audit. Leave this field blank to have the system retrieve all values for this field (wild card).
View Changes Only	If cleared, the system returns all records with an action of <i>Insert</i> , <i>Before</i> , <i>After</i> , or <i>Delete</i> . If selected, the system does not return records with an action of <i>Before</i> and returns only records with an action of <i>Insert</i> , <i>After</i> , or <i>Delete</i> .
Search	After you enter your search parameters, click this button to return audit data to the Degree page. To change the data that the system returns, update the selection criteria and search for data again.

Note. When you click the Search button, the retrieval process begins. If the system finds changes to any of the records within your search criteria, the system automatically takes you to the first page where changes exist. If no changes are found, the system remains on the Search Criteria page.

Viewing Degree Change Audit Results

Access the Degree page (Records and Enrollment, Graduation, Degree Change Audit, Degree).

Search Criteria	Degree	Degree Honors	Degree Plan	Degree Subplan		
ID:		Start Date: 09/15/2004		Changes Only ☐		
User ID:		End Date:				
Degree Info Completion Info Honors/Rank						
User ID	Date/Time	Action	ID	Degree Nbr	Degree	Institution
PS	09/15/2004 7:28:02AM	After	AA0034	01	BA	PSUNV
LS	09/15/2004 7:28:02AM	Before	AA0034	01	BA	PSUNV
PS	09/15/2004 7:24:48AM	After	AA0026	01	BA	PSUNV
	09/15/2004 7:24:48AM	Before	AA0026	01	BA	PSUNV
PS	09/15/2004 7:24:11AM	Insert	AA0010	01	BA	PSUNV

Degree Change Audit - Degree page: Degree Info tab

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

User ID	The ID of the individual who made changes to the ACAD_DEGR record. For rows where the action is <i>Delete</i> , no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.
Date/Time	When changes to the ACAD_DEGR record were made.
Action	Action types include the following: <i>Insert:</i> User inserted a new row (a row was added to the database). <i>Delete:</i> User deleted a row out of the database. For rows where the action is <i>Delete</i>, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field. <i>Before:</i> Image of the record before it was updated. <i>After:</i> Image of the record after it was updated.
ID	The ID of the student whose degree was changed.
Degree Nbr (degree number)	Students can have more than one degree, and each degree is assigned a degree number.
Degree	The student's degree.
Institution	The academic institution associated with the degree.

Completion Info Tab

Select the Completion Info tab.

Search Criteria		Degree	Degree Honors	Degree Plan	Degree Subplan		
ID:					Start Date: 09/15/2004	Changes Only ☐	
User ID:					End Date:		
Degree Info		Completion Info		Honors/Rank			
User ID	Date/Time	Action	Career	Completion Term	Confer Date	Degr Stat	Degr Dt
PS	09/15/2004 7:28:02AM	After	UGRD	0505	12/15/2003	A	03/27/2001
LS	09/15/2004 7:28:02AM	Before	UGRD	0450	01/04/2002	A	03/27/2001
PS	09/15/2004 7:24:48AM	After	UGRD	0310	05/01/1998	R	09/15/2004
	09/15/2004 7:24:48AM	Before	UGRD	0310	05/01/1998	A	09/14/1998
PS	09/15/2004 7:24:11AM	Insert	UGRD	0505	12/15/2003	A	09/15/2004

Degree page: Completion Info tab

- Career** The career under which the student earns the degree.
- Completion Term** The completion term of the degree.
- Confer Date** The date the degree was conferred. This is the date when the degree is official.
- Degr Stat** (degree status) The status of the degree. Choices are *A* (active) and *R* (revoked).
- Degr Dt** (degree date) The date the degree is updated to a status of awarded or revoked. This date may differ from the actual confer date.

Honors/Rank Tab

Select the Honors/Rank tab.

Search Criteria		Degree	Degree Honors	Degree Plan	Degree Subplan		
ID:					Start Date: 09/15/2004	Changes Only ☐	
User ID:					End Date:		
Degree Info		Completion Info		Honors/Rank			
User ID	Date/Time	Action	Hon Prefix	Hon Suffix	Degree GPA	Class Rank	Of
PS	09/15/2004 7:28:02AM	After					
LS	09/15/2004 7:28:02AM	Before					
PS	09/15/2004 7:24:48AM	After			3.800		
	09/15/2004 7:24:48AM	Before			3.800		
PS	09/15/2004 7:24:11AM	Insert					

Degree page: Honors/Rank tab

Hon Prefix (honors prefix)	The degree honors prefix for the degree.
Hon Suffix (honors suffix)	The degree honors suffix for the degree.
Degree GPA (degree grade point average)	The degree grade point average.
Class Rank Of	The student's class rank and class size.

See Also

[Chapter 44, "Graduating Students," Verifying and Updating Student Degree Data, page 1083](#)

Viewing Degree Honors Change Audit Results

Access the Degree Honors page (Records and Enrollment, Graduation, Degree Change Audit, Degree Honors).

Search Criteria	Degree	Degree Honors	Degree Plan	Degree Subplan
ID:		Start Date: 09/15/2004		Changes Only ☐
User ID:		End Date:		
Degree Info		Honors Info		
User ID	Date/Time	Action	ID	Degree Nbr
PS	09/15/2004 7:25:31AM	Insert	AA0034	01

Degree Honors page: Degree Info tab

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

User ID The ID of the individual who made changes to the ACAD_DEGR_HONS record. For rows where the action is *Delete*, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.

Date/Time When changes to the ACAD_DEGR_HONS record were made.

Action

Action types include the following:

Insert: User inserted a new row (a row was added to the database).

Delete: User deleted a row out of the database. For rows where the action is *Delete*, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.

Before: Image of the record before it was updated.

After: Image of the record after it was updated.

ID

The ID of the student whose degree was changed.

Degree Nbr(degree number)

Students can have more than one degree, and each degree is assigned a degree number.

Honors Info Tab

Select the Honors Info tab.

Search Criteria	Degree	Degree Honors	Degree Plan	Degree Subplan			
ID:		Start Date: 09/15/2004		Changes Only ☐			
User ID:		End Date:					
Degree Info		Honors Info					
User ID	Date/Time	Action	Honors Nbr	Hon Code	Award Date	Diploma	Transcript
PS	09/15/2004 7:25:31AM	Insert	1	HON	01/04/2002	Y	Y

Degree Honors page: Honors Info tab

Honors Nbr (honors number)

Students can have multiple honors for each degree. Each honors value has a unique number.

Hon Code (honors code)

The honors code associated with the degree.

Award Date

The date the honor was awarded.

Diploma

The setting of the Print on Diploma check box on the Degree Honors page. The check box status values are Y for selected, and N for cleared.

Transcript

The setting of the Print on Transcript check box on the Degree Honors page. The check box status values are Y for selected, and N for cleared.

Viewing Degree Plan Change Audit Results

Access the Degree Plan page (Records and Enrollment, Graduation, Degree Change Audit, Degree Plan).

Search Criteria	Degree	Degree Honors	Degree Plan	Degree Subplan	
ID:		Start Date: 09/15/2004		Changes Only ☐	
User ID:		End Date:			
Plan Info	Career/Degree	Descriptions	Honors/Rank		
User ID	Date/Time	Action	ID	Degree Nbr	Acad Plan
PS	09/15/2004 7:26:50AM	After	AA0034	01	PSYCH
LS	09/15/2004 7:26:50AM	Before	AA0034	01	PSYCH
PS	09/15/2004 7:24:48AM	After	AA0026	01	ENGL-BA
	09/15/2004 7:24:48AM	Before	AA0026	01	ENGL-BA
PS	09/15/2004 7:24:11AM	Insert	AA0010	01	MUS-BA

Degree Plan page: Plan Info tab

User ID The user ID of the individual who made changes to the ACAD_DEGR_PLAN record. For rows where the action is *Delete*, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.

Date/Time When changes to the ACAD_DEGR_PLAN record were made.

Action Action types include the following:

Insert: User inserted a new row (a row was added to the database).

Delete: User deleted a row out of the database. For rows where the action is *Delete*, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.

Before: Image of the record before it was updated.

After: Image of the record after it was updated.

ID The ID of the student whose degree was changed.

Degree Nbr (degree number) Students can have more than one degree, and each degree is assigned a degree number.

Acad Plan(academic plan) All plans associated with the degree.

Career/Degree Tab

Select the Career/Degree tab.

Search Criteria		Degree		Degree Honors		Degree Plan		Degree Subplan	
ID:				Start Date: 09/15/2004				Changes Only ☐	
User ID:				End Date:					
Plan Info		Career/Degree		Descriptions		Honors/Rank			
User ID	Date/Time	Action	Career	Career Nbr	Degr Stat	Degr Dt	Override		
PS	09/15/2004 7:26:50AM	After	UGRD	0 A	03/27/2001	Y			
LS	09/15/2004 7:26:50AM	Before	UGRD	0 A	03/27/2001	N			
PS	09/15/2004 7:24:48AM	After	UGRD	0 R	09/15/2004	N			
	09/15/2004 7:24:48AM	Before	UGRD	0 A	09/14/1998	N			
PS	09/15/2004 7:24:11AM	Insert	UGRD	0 A	09/15/2004	N			

Degree Plan: Career/Degree tab

Career The career under which the student earns the degree.

Career Nbr (career number) The number of the career associated with the degree. For students with more than one program in a single career, this number increments from zero.

Degr Stat (degree status) The status of the degree. Choices are *A* (active) and *R* (revoked).

Degr Dt (degree date) The date the degree is updated to a status of awarded or revoked. This date may differ from the actual confer date.

Override This represents the setting of the Override check box on the Degree Plan page.

Descriptions Tab

Select the Descriptions tab.

Search Criteria		Degree		Degree Honors		Degree Plan		Degree Subplan	
ID:				Start Date: 09/15/2004				Changes Only ☐	
User ID:				End Date:					
Plan Info		Career/Degree		Descriptions		Honors/Rank			
User ID	Date/Time	Action	Dipl Descr						
PS	09/15/2004 7:26:50AM	After	Baccalaureate of Arts Degree in Psychology						
LS	09/15/2004 7:26:50AM	Before							
PS	09/15/2004 7:24:48AM	After							
	09/15/2004 7:24:48AM	Before							
PS	09/15/2004 7:24:11AM	Insert							

Degree Plan: Descriptions tab

Dipl Descr (diploma description)

The academic plan diploma description, if different from the default.

Trns Descr (transcript description)

The academic plan transcript description, if different from the default.

Honors/Rank Tab

Select the Honors/Rank tab.

Search Criteria Degree Degree Honors Degree Plan Degree Subplan									
ID:		Start Date: 09/15/2004 Changes Only ☐							
User ID:		End Date:							
Plan Info Career/Degree Descriptions Honors/Rank									
User ID	Date/Time	Action	Hon Prefix	Hon Suffix	Plan GPA	Class Rank	Of	Plan Seq	
PS	09/15/2004 7:26:50AM	After	HHO					10	
LS	09/15/2004 7:26:50AM	Before						10	
PS	09/15/2004 7:24:48AM	After						10	
	09/15/2004 7:24:48AM	Before						10	
PS	09/15/2004 7:24:11AM	Insert						10	

Degree Plan: Honors/Rank tab

Hon Prefix (honors prefix)

The degree honors prefix for the plan.

Hon Suffix (honors suffix)

The degree honors suffix for the plan.

Degree GPA (degree grade point average)

The plan grade point average.

Class Rank Of

The student's class rank and class size.

Plan Seq (plan sequence)

The number of the plan within the program.

See Also

[Chapter 44, "Graduating Students," Viewing and Modifying Degree Plan Data, page 1086](#)

Viewing Degree Subplan Change Audit Results

Access the Degree Subplan page (Records and Enrollment, Graduation, Degree Change Audit, Degree Subplan).

Search Criteria					Degree		Degree Honors		Degree Plan		Degree Subplan		
ID:						Start Date: 09/15/2004						Changes Only ☐	
User ID:						End Date:							
Degree Info			Plan/SubPlan Override			Descriptions			Honors/Plan/Sequence Number				
User ID			Date/Time			Action			ID			Degree Nbr	
												01	

Degree Subplan page: Degree Info tab

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

User ID	The user ID of the individual who made changes to the ACAD_DEGR_SPLN record. For rows where the action is <i>Delete</i> , no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field.
Date/Time	When changes to the ACAD_DEGR_SPLN record were made.
Action	Action types include the following: <i>Insert:</i> User inserted a new row (a row was added to the database). <i>Delete:</i> User deleted a row out of the database. For rows where the action is <i>Delete</i>, no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string "*****" appears in the User ID field. <i>Before:</i> Image of the record before it was updated. <i>After:</i> Image of the record after it was updated.
ID	The ID of the student whose degree was changed.
Degree Nbr (degree number)	Students can have more than one degree, and each degree is assigned a degree number.

Plan/SubPlan Override Tab

Select the Plan/SubPlan Override tab.

Search Criteria

Degree

Degree Honors

Degree Plan

Degree Subplan

ID:

Start Date: 09/15/2004

Changes Only ☐

User ID:

End Date:

Degree Info

Plan/SubPlan Override

Descriptions

Honors/Plan/Sequence Number

User ID	Date/Time	Action	Acad Plan	Sub-Plan	Override
					N

Degree Subplan page: Plan/SubPlan Override tab

- Acad Plan (academic plan)

The academic plan.
- Sub-Plan

The academic subplan.
- Override

Represents the Override check box on the Degree Sub-Plan page.

Descriptions Tab

Select the Descriptions tab.

Search Criteria

Degree

Degree Honors

Degree Plan

Degree Subplan

ID:

Start Date: 09/15/2004

Changes Only ☐

User ID:

End Date:

Degree Info

Plan/SubPlan Override

Descriptions

Honors/Plan/Sequence Number

User ID	Date/Time	Action	Dipl Descr

Degree Subplan page: Descriptions tab

- Dipl Descr (diploma description)

The academic subplan diploma description, if different from the default.
- Trns Descr (transcript description)

The academic subplan transcript description, if different from the default.

Honors/Plan/Sequence Number Tab

Select the Honors/Plan/Sequence Number tab.

Search Criteria

Degree

Degree Honors

Degree Plan

Degree Subplan

ID:

Start Date: 09/15/2004

Changes Only ☐

User ID:

End Date:

Degree Info

Plan/SubPlan Override

Descriptions

Honors/Plan/Sequence Number

User ID	Date/Time	Action	Hon Prefix	Hon Suffix	Seq Nbr

Degree Subplan page: Honors/Plan/Sequence Number tab

- Hon Prefix** (honors prefix)

The degree honors prefix for the subplan.
- Hon Suffix** (honors suffix)

The degree honors suffix for the subplan.
- Seq Nbr** (sequence number)

The sequence number of the subplan assigned to the plan.

Applying for Graduation Through Self Service

If your institution has licensed PeopleSoft Campus Self Service, your students can apply for graduation directly over the web.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Self-Service Degree Progress/Graduation," Applying for Graduation Using Self-Service Pages

Chapter 45

Producing Transcripts

This chapter provides an overview of transcript-related processes (including self-service transcript processing) and discusses how to:

- Process transcripts for individuals or small groups of students.
- Process batch transcripts (Application Engine).
- Use the XML transcript template.
- Create batch transcript requests (COBOL).
- Use the Grade Review Transcript Release process.
- Produce electronic transcripts.
- Produce electronic transcripts in batch.
- Review TS130 outbound transactions.
- Process TS131 inbound files.
- Review student transcript request history.
- Purge transcripts.
- Use self-service transcripts.

See Also

[Chapter 14, "Setting Up Transcripts," page 311](#)

Understanding Transcript-Related Processes

Two distinct processes are available to create transcripts. One transcript process uses COBOL to generate the transcript and Crystal reports to print the transcript. The other transcript process generates transcripts using Application Engine, creates detailed results tables, and uses XML to produce the report in PDF format. The processes have separate and distinct transcript type setup and processing pages. These transcript processes were not designed to be in production concurrently. The control of which process creates transcripts is determined by the security granted to the components.

After you have set up transcript notes, transcript types, and transcript type security, you're ready to create transcript requests and process transcripts. The PeopleSoft Transcript feature enables you to define multiple types of transcripts at varying levels of security, formality, appearance, and function. You can produce transcripts for individual students or for dynamically created groups of students that meet criteria you specify. You can process transcripts online or in the background at scheduled intervals, and you can send the results to a file, a window, or a printer. Finally, the Transcript feature includes a purge process that enables you to delete transcript results and requests. Purging transcripts periodically is a maintenance practice that enhances system performance.

If you are using the COBOL process to create transcripts, the choices you have for producing transcripts are the same as those that you have for producing advising reports. In the Application Engine transcript process, the advisement reports are created by using a different component. We briefly discuss advising reports in this section, but you are encouraged to review the *PeopleSoft Academic Advisement 9.0 PeopleBook* for more information.

The COBOL transcript process provides you with five components that you can use to create, process, print, and purge transcript requests. This table lists and describes how to use those components:

Component	Usage
Transcript Request component	Request, process, and print small numbers of transcripts (recommended for fewer than 20).
Batch Transcript Request	Define group parameters and create request for large group (more than 20) of students.
Batch Transcript Generation component	Process and generate transcripts for a previously created online request. Generate transcripts for a previously created batch request.
Batch Transcript Print component	Print transcripts that were previously generated through either the Transcript Request inquiry component or the Batch Transcript Generation process component.
Transcript Purge component	Purge transcript requests and transcript results based on parameters that you specify.

The Application Engine transcript process provides three components that you can use to create, process, print, and purge transcript requests. This table lists and describes how to use those components:

Component	Usage
Request Transcript Report component	Request, process, and print small numbers of transcripts (recommended for fewer than 20).
Process Transcripts component	This component combines the functionality of both the Batch Transcript Request and the Generate and Print Transcripts component.

<i>Component</i>	<i>Usage</i>
Purge Transcript Reports component	Purge transcript requests and transcript results based on parameters that you specify.

Processing Transcripts for Individuals or Small Groups of Students

This section provides an overview of the Request Transcript Report component, lists prerequisites, and discusses how to:

- Create transcript request headers.
- Specify students for evaluation.
- Enter transcript recipient information.
- View process messages for transcript requests.

Use the Request Transcript Report component to process application engine based transcripts for individuals or small groups of students.

Note. The pages of the Transcript Request component (TSCRPT_RQST) still exist in the system: SA_REQUEST_HEADER, SA_REQUEST_DETAIL, SA_REPORT_RESULTS, and SA_REQ_REPORT_ERR.

Use this component to process the COBOL based transcripts.

Understanding the Request Transcript Report Component

Use the Request Transcript Report component (application engine) to create and update transcript requests for an individual student or a small group of students. A small group of students is defined as a group of fewer than 20. Process the request, and you can view the transcripts online and print them. You can also use the Request Transcript Report component to create transcript requests for processing on future dates or events. For example, a student can request that a transcript be processed after they are awarded a degree, after their grades are posted for a term, or when a specific date arrives. When the future transcript request is saved, the system generates a report request number. You can then use a single report request number, a range of report request numbers, or requested print dates to process these requests.

Complete these steps to create a transcript request by student ID:

1. Select the transcript type and enter other general parameters on the Transcript Request Header page.
2. Enter IDs for students requesting transcripts, as well as recipient information, on the Transcript Request Detail page.
3. Submit your request by clicking the Process Request button on the Request Detail page.
4. View results in .PDF format by clicking the View Report link that appears for each student.
5. If no link appears, view any process errors on the Report Errors page.

6. Print all results by clicking the Print button.

Prerequisite

Before you can create an online transcript request, you must create a transcript type.

Pages Used to Create an Online Transcript Request

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transcript Request Header	SSR_TSRQST_HDR	Records and Enrollment, Transcripts, Request Transcript Report, Transcript Request Header	Select the type of transcript you want to process and set general parameters for the request.
Transcript Request Detail	SSR_TSRQST_DTL	Records and Enrollment, Transcripts, Request Transcript Report, Transcript Request Detail	Enter the IDs that you want to process and the number of copies you want to create. Run the Flexible Transcript generation process.
Send To Information	SA_REQUEST_DTL_SEC	Click the Send To button on the Transcript Request Detail page.	Specify an address to which to send a student's transcript.
Report Messages	SA_REQ_REPORT_ERR	Records and Enrollment, Transcripts, Request Transcript Report, Report Messages	Review messages about any problems the system encounters while processing the transcript request.

Creating Transcript Request Headers

Access the Transcript Request Header page (Records and Enrollment, Transcripts, Request Transcript Report, Transcript Request Header).

Transcript Request Header		Transcript Request Detail	Report Messages
Report Request Nbr: 000000000 Request Date: 10/02/2006 User ID: PS			
Request Attributes			
*Institution:	PSUNV	PeopleSoft University	
*Transcript Type:	ALLOF	Official Transcripts - All	
	☐	Freeze Record	
	☐	Override Service Indicator	
Number of Copies:	1		
Future Release:	Immediate Processing		
Academic Career:			
Term:			
Print Date:	10/02/2006		
Request Reason:			
	☐	Cancel Request	

Transcript Request Header page

Institution

The system populates this field by default. You can change this value before you enter a transcript type.

Transcript Type

Select a transcript type with the correct detail organization that you want to appear on the transcripts. The system populates this field by user default, but you can change this value. Transcript type values are defined on the Define Transcript Type - Basic Data page, and the Transcript Type default is defined on the User Defaults 4 page.

Freeze Record

Select to protect the request from being purged during the transcript purge process. Because requests build up quickly in your system, the application provides a purge process to delete them. If you select this check box, the purge process does not delete the request.

Override Service Indicator

Select this check box to have the system process transcripts for all students, regardless of whether their service indicators match those specified for this transcript type on the Basic Data page.

For instance, some service impacts—if listed on the Basic Data page and attached to the student through a service indicator—might prevent a student from receiving a transcript.

See [Chapter 14, "Setting Up Transcripts," Defining Transcript Type Basic Data, page 322.](#)

See [Chapter 41, "Tracking Student Data," Using Student Records Service Impacts, page 1015.](#)

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Service Indicators."

If you do not select this check box, the system enforces the service indicator rules and does not generate transcripts for students with negative service indicators that match the service impacts on the Basic Data page for this transcript type.

Future Release

Select a value to indicate that you want the system to print the transcript at a later date. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Values are:

- *Degree Confer Date:* The Career and Term fields become available for entry.
- *Grades Post:* The Career and Term fields become available for entry.
- *Specific Date:* The Print Date field is populated by default to the current date and is available for entry.
- *Hold:* The Print Date field is populated by default to the current date and is available for entry. This option indicates that you are going to process the request at a later and as yet undetermined time. The system saves this request until you change the future release value and enter a specific print date.
- *Immediate Processing:* The Print Date field is populated by default to the system date. This value is used as the online default, as well as by self service.
- *Transfer Credit Post:* The Print Date field is populated by default to the current date and becomes available for entry. You can issue a transcript after the system has articulated transfer credit to the student's academic record. This process is not automatic.

Academic Career and Term

If available for entry, select the appropriate academic career and term values. Later, you can issue a transcript on the fully graded date (future release value of *Grades Post*) or after you award degrees for the students (future release value of *Degree Confer Date*). The system populates the Print Date field with either the fully graded date from the Academic Term Calendar 3 page or the degree confer date from the Academic Term Calendar 3 page. Term values are defined on the Term Table page.

To create transcripts for future release, enter the request parameters and save the request without processing it. To later process and print the future release request, enter a single or range of report request numbers or requested print dates on the Transcript Generation page (if running COBOL transcripts) or Process Transcripts (if running application engine transcripts). The system processes requests for all transcripts due to print within the range you specify. After you process a transcript request, the system marks the report request ID as complete and excludes it from further processing.

This table lists how the Future Release field values affect the Academic Career, Term, and Print Date fields:

<i>Field Value</i>	<i>Academic Career</i>	<i>Term</i>	<i>Print Date</i>
<i>Degree</i>	Available for entry	Available for entry	Unavailable for entry (default is <i>Degree Confer Date</i> for Term).
<i>Grades</i>	Available for entry	Available for entry	Unavailable for entry (default is <i>Fully Graded Date</i> for Term).
<i>Hard Date</i>	Unavailable for entry	Unavailable for entry	Available for entry (default is the system date).
<i>Hold</i>	Unavailable for entry	Unavailable for entry	Available for entry (default is the system date).
<i>Imed Proc</i> (immediate processing) (default)	Unavailable for entry	Unavailable for entry	Unavailable for entry (default is the system date).
<i>Transfr Cr</i> (transfer credit)	Unavailable for entry	Unavailable for entry	Available for entry (default is the system date).

Request Reason	Select a request reason. The reason appears on the transcript if the transcript type is set to display request reason information. Values for this field are delivered with your system as translate values. You can modify these values.
Cancel Request	Select this check box to cancel a future-dated transcript request before it is processed.

Using the Request Header Page (COBOL Based Transcripts Only)

These additional fields appear on the Request Header page (Records and Enrollment, Transcripts, Transcript Request, Request Header):

Output Destination	Select the output destination of the transcript. This determines where the system electronically sends the results of the process. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values are: <i>Page:</i> Sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window. <i>Printer:</i> Like the Page option, sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window.
Report Format	With a transcript type that includes an advising report, the Report Format field becomes available for entry. A single report request can have multiple report formats. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values are: <i>Standard Report Format:</i> Indicates that the report is delivered to a page or printer. <i>Analysis Database:</i> Indicates that the results of the report are written to the analysis database. The results are stored in computer-readable format so application programs can be written against the tables to create user configurable reports. (This is the only field value that refreshes the database tables.) <i>Completed Only:</i> Indicates that the report contains only those requirement groups that have been wholly completed. (Usually, the advising report bolds incomplete requirement groups and requirements while completed requirement groups are not bold.) <i>Incompleted Only:</i> Indicates that the report contains only those requirement groups that have not been wholly completed. (This field value can help a counselor determine exactly what a student needs to satisfy in order to graduate.)

Specifying Students for Evaluation

Access the Transcript Request Detail page (Records and Enrollment, Transcripts, Request Transcript Report, Transcript Request Detail).

*Seq Nbr	*ID	Name	Number of Copies
1	SRTS0001	David Losholl	1

Transcript Request Detail page

Seq Nbr(sequence number) The system determines the sequence number, and the number is the order in which the transcripts are processed.

ID Enter IDs of students for whom you want to process transcripts. The system populates the name by default after you enter the ID and tab out of the field.

Number of Copies Although you can indicate the overall number of copies on the Transfer Request Header page, you can override the number on a student-by-student basis by changing the value in this field.

Send To Before you process the transcript request, click to enter recipient information for each ID.

Process Request Click when you are ready to submit the request for processing. An Application Engine process commences. When the process is complete, the system displays the View Report link next to the student's ID.

If no View Report link appears, access the Report Errors page to investigate what went wrong during the process.

View Report Click this link to view the transcript as a PDF file. Each student ID has a link to view its report.

Print After you successfully complete the transcript request process, the Print button becomes available. Click the button to submit all of the transcripts on this request to the printer.

Using the Request Detail Page (COBOL Based Transcripts Only)

Here is some information about the Request Detail page (Records and Enrollment, Transcripts, Transcript Request, Request Detail):

- Process Request**

Click when you are ready to submit the request for processing. A COBOL/SQL process commences and, when complete, the system displays the results on the Report Results page and automatically opens that page.
- Print**

After you have successfully completed the transcript request process, the Print button on the Request Detail page becomes available. Click the button to submit the Crystal to the Report manager. Use the Report Manager link to view and print the Crystal output, which the system sorts by Student Name within Transcript Request ID. Click the Print button on the Crystal window and choose whether you want to print all pages or a range of pages. When you have large groups of transcripts to print, clicking the Print All button significantly reduces the time it takes you to print them. You can also print transcripts by individual student ID by clicking the Print button on the Report Results page.

Entering Transcript Recipient Information

Access the Send To Information page (click the Send To button on the Transcript Request Detail page).

Send To Information

ID:

Send To

Send To:

Specify External Org ID:

☐

Country:

USA

United States

Address:

Edit Address

OK

Cancel

Send To Information page

Send To

Enter the name of the addressee.

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- Specify External Org ID**
(specify external organization ID)

Select to send the transcript to an external organization that you already have in your database.
- Org ID**(organization ID)

Select the appropriate external organization ID number. If you do not select the Specify External Organization ID check box, enter the name and address of the recipient in the available address fields.
- OK**

Click to save and exit the page.
- Cancel**

Click to exit the page.
- Edit Address**

Click this link to enter or update the address where the transcript will be sent.

Viewing Process Messages for Transcript Requests

Access the Report Messages page (Records and Enrollment, Transcripts, Request Transcript Report, Report Messages).

Transcript Request Header

Transcript Request Detail

Report Messages

Report Request Nbr:

000000000

On Request

Transcript Type:

ALLOF

Official Transcripts - All

Find | View All

First

1 of 1

Last

Seq Nbr:

1

ID:

SRTS0001

David Losholl

Sequence

Message Text

Report Messages page

- Sequence**

After you run the process, the system displays the sequence number in the Sequence column.
- Message Text**

The message text explains the message or error, if any.

Using the Report Results Page (COBOL)

Here is some information about the Report Results page (Records and Enrollment, Transcripts, Transcript Request, Report Results):

Print

Click to submit the Crystal to the Report manager. Use the Report Manager link to view and print the Crystal output. Click the Print button on the Crystal window and choose whether you want to print all pages or a range of pages. When you have large groups of transcripts to print, clicking the Print All button significantly reduces the time it takes you to print them. You can also print transcripts by individual student ID by clicking the Print button on the Report Results page.

To print transcripts for multiple students whose transcripts you have processed within this report request number, click the Print button on the Request Detail page then click Print All from the Crystal window. If necessary, you can save the transcript request and both process and print the request at a later time.

To view messages about any problems that the system encounters while processing the transcript request (COBOL), use the Report Errors page (Records and Enrollment, Transcripts, Transcript Request, Report Errors).

Processing Batch Transcripts (Application Engine)

This section discusses how to process Application Engine based batch transcripts.

The Process Transcripts process enables you to process transcripts in multiple ways for a large group of students at one time. Based on a specific academic institution or transcript type, you can select the appropriate process action to: create a transcript request; generate or generate and print transcripts; only print transcripts; or request, generate, and print transcripts in a single step.

Complete these steps to process batch transcripts:

1. Specify the parameters for which you want to process transcripts on the Process Transcripts page.
2. Click the Run button on the Process Transcripts page to request, generate, or print your transcript.
3. After the process finishes, select View Log and Trace and select the PDF file.

Note. To process transcript requests for individual student IDs, use the Request Transcript Report component.

Page Used to Process Batch Transcripts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Transcripts	SSR_RUNCTL_TSRPT	Records and Enrollment, Transcripts, Batch Transcripts, Process Transcripts	Select the institution and type of transcript that you to want process, and the appropriate processing action and student criteria for the group of students.

Defining Transcript Processing Options

Access the Process Transcripts page (Records and Enrollment, Transcripts, Batch Transcripts, Process Transcripts).

Process Transcripts

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PeopleSoft University

*Transcript Type:

Unofficial Transcript -- All

Process Action

Create Transcript Request

Request Options

☐ Override Service Indicator

Population Selection

☐ Population Selection

Student Select List

☒ Use Student Select

Clear List

	EmpID	Name		
1	SR12201	Keshishi,Khanom	+	-

Process Transcripts page

Note. The fields on this page change based on the Process Action that you select.

- Academic Institution

Select the institution for which the transcript type is associated. When you run the process, the system creates a transcript request number for each row within the process instance. Institution values are defined on the Academic Institution Table page.
- Transcript Type

Select the transcript type. Be sure you select a transcript type with the correct detail organization that you want to appear on the transcripts. You can organize by academic career or chronology. Transcript type values are defined on the Define Transcript Type - Basic Data page.

Process Action

Select one of these options: *Create Transcript Request*, *Generate Transcript*, *Generate and Print Transcript*, *Print Transcript*, or *Request, Generate and Print*.

If you select a Process Action of *Generate Transcript* or *Generate and Print Transcript*, the system finds all transcripts that have an On Request status (requested only).

If you select a Process Action of *Print Transcript*, the system finds all transcripts that have a Completed status (generated), but have not yet printed.

To reprint a previously printed transcript, select the Reprint check box. This check box is available only when you select a Process Action of *Print Transcript*.

Note. If you select the Allow XML Output File check box on the Define Transcript Type - Basic Data page, the Output XML File and Output File Path fields appear on this page when you select a value of *Generate and Print Transcript*, *Print Transcript*, or *Request, Generate and Print* in the Process Action field.

Override Service Indicator

Select this check box to override any service indicators attached to student records that may prevent a transcript from being generated.

Population Selection

This group box appears if you select the *Create Transcript Request* or *Request, Generate and Print* process action.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Query Name

If you selected *PS Query*, select an existing query in the system. The application delivers these predefined queries:

- SSR_TS_ACADLEVEL: Transcript Query by Acad Level (transcript query by academic level)
- SSR_TS_ADVISOR: Transcript Query by Advisor
- SSR_TS_CAREER: Transcript Query by Career
- SSR_TS_PROGPLAN: Transcript Query by Prog Plan (transcript query by program/plan)
- SSR_TS_PROGRAM: Transcript Query by Program
- SSR_TS_STUDENT_GRP: Transcript Query by Stdnt Grp (transcript query by student group)

Note. You should not modify the delivered queries. Instead, create new queries using the Save-As feature so that the integrity of the delivered queries is not compromised.

Student Select List

This group box appears if you select the *Create Transcript Request* or *Request, Generate and Print* process action. Select the Use Student Select check box to add individual student IDs to your batch transcript process request. You can use this method alone or in combination with the Population Selection process to create the batch request.

EmplID (employee ID)

Enter individual student IDs that you want to include in the batch transcript request. The student's name appears to the right of this field.

Clear List

Click this button to remove all entered names from the student list.

Generate and Print Options

This group box appears if you select the *Generate Transcript*, *Generate and Print Transcript*, or *Print Transcript* process option.

Generate Transcripts By

Select whether to generate transcripts by *Request Date* or *Request Nbr* (request number).

Request Date

To generate transcripts by date, enter a single date or date range for the previously created transcript requests.

Request Number

To generate transcripts by number, enter one or more previously created transcript request numbers.

Additional Options

If you selected the *Generate and Print Transcript*, *Print Transcript*, or *Request, Generate and Print* process option, this group box appears.

Print Sort Option

Select whether to sort the transcripts for printing by *Last Name*, *Student ID*, or *Zip/Postal Code*.

Using the XML Transcript Template

This section discusses how to use the XML transcript template.

Understanding the XML Transcript Template

When a transcript is processed, an XML file is also created, with data for testing.

The XML file is uploaded to the Data Source page (Reporting Tools, XML Publisher, Data Source, Data Source).

To use the XML transcript template:

1. Select Reporting Tools, XML Publisher, Report Definition and search by SSR.
2. Select *SSR_TSRPT* and access the Template page.
3. Click the Download button to select the template (it is an .rtf file).

Note. Two rows exist: Landscape and Portrait.

4. To access the sub template, select Reporting Tools, XML Publisher, Content Library.
5. Search using SSR and select *SSR_TSRPT_STMPLT*.
6. To use the Word Plug-In during testing of the template design, you must make some changes to the template so that the Word Plug-In knows where to find the sub template: click Download to view the instructions, which are at the top of the sub template.
7. To access the Plug-In, select Reporting Tools, XML Publisher, Setup, Design Helper.

See Also: *PeopleTools PeopleBook: BI Publisher for Peoplesoft*

Personalizing XML Transcript Dates

The system date format is set up on the Define Personalizations page in PeopleTools (PeopleTools, Personalization, Personalization Options, Define Personalizations, Format). Individual users can also set the date format by using the My Personalizations menu link. A local variable exists on the XML Transcript template, `date_mask`, to represent the date mask as the date format that was set up using personalizations. This variable is then added to each date field in the template, as the academic plan date. The Print Date and Plan Date fields on the transcript use this date formatting, as this example illustrates:

Name:	Sevilla Flores		
Student ID:	SRTS0003		
Institution Info:	PeopleSoft University 4301 Hacienda Boulevard Pleasanton, CA 94588		
Print Date:	07/22/2009		
Birthdate:	05/01/1977		
Sex:	Female		
Student Address:	2705 3rd Ave Chandler, AZ 85459		
	Academic Program History		
Program:	Fine Arts Undergraduate		
03/01/1997:	Active in Program		
	03/01/1997:	Music Theory and History Major	
Program:	Fine Arts Undergraduate		
08/01/1998:	Active in Program		
	08/01/1998:	Music Performance Major	
Other Institutions Attended	Long Beach City College 1234 Main Street 234 Third Street Long Beach, CA 90271		
Basis of Admission	(GEN) Applicant has met the general requirements for admission.		
	Degrees Awarded		
Degree:	Honors in Bachelor of Fine Arts with Distinction		
Confer Date:	06/01/2001		
Degree GPA:	3.500		
Degree Rank:	5 of 45		
Degree Honors:	Cum Laude		
Plan:	Honors in Music Performance		
Plan GPA:	3.900		
Sub-Plan:	Piano		
Sub-Plan:	Voice		
Requestor:	Betty Locherty		

Example of personalized date formatting on XML Transcript

Creating Batch Transcript Requests (COBOL)

The Transcript Request process (COBOL) component enables you to create transcript requests for a large group of students at one time based on a specific academic institution and transcript type, and based on additional selection criteria and key values that you specify to define the group. For example, you can use this component to create transcript requests for all senior-level undergraduates for the fall term.

Note. The pages of the Transcript Request process (RUNCTL_SR_TSBATCH) and the Batch Transcript Generation (RUNCTL_SR_TSBATCH) components still exist in the system: RUNCTL_SRTSCRPT and RUNCTL_SRTSBGEN.

Use these components to process the COBOL based transcripts.

To create a batch transcript request (COBOL):

1. Specify the parameters for which you want to create transcript requests on the Batch Transcript Request page.
2. Click the Run button on the Batch Transcript Request page to create your request.
3. After the Transcript Request process finishes, view the Message Log and note the Transcript Request Number. You can enter the Transcript Request Number on the Transcript Generation page to generate the transcripts.

This section lists prerequisites and discusses how to run the Batch Transcript Requests process.

Prerequisites

Before you can process a batch transcript request, you must:

- Define your run control ID.
- Define transcript types and any of the key values that you want to use as search criteria.

Page Used to Create Batch Transcript Requests

Page Name	Definition Name	Navigation	Usage
Batch Transcript Request	RUNCTL_SRTSCRIPT	Records and Enrollment, Transcripts, Batch Transcripts, Batch Transcript Request	Select the institution and type of transcript that you want process, select the criteria for the group of students, and create the transcript requests for all students who meet your selection criteria. This process only creates a request; it does not generate a transcript. To generate transcripts, use the Transcript Generation component.

Running the Batch Transcript Request Process

Access the Batch Transcript Request page (Records and Enrollment, Transcripts, Batch Transcripts, Batch Transcript Request).

Batch Transcript Request

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

User ID: PS Run Control ID: PS

Request No: 1 Product: SA Application: SRTSRQST When: Always

Instance: Status: Pending

*Institution	*Transcript Type	*Transcript Request Criteria	Group Name				
PSUNV	ALLOF	Student Group	ATHL	⌕	Athlete	+	-

Batch Transcript Request page

Institution

Select the institution for which the transcript type is associated. Add rows as necessary. When you run the process, the system creates a transcript request number for each row within the process instance. Institution values are defined on the Academic Institution Table page.

Transcript Type

Select the transcript type. Be sure you select a transcript type with the correct detail organization that you want to appear on the transcripts. You can organize by academic career or chronology. Academic advising reports can include both an advising report and a regular transcript. When transcript types have the Advising Report check box or the Special Advising Report check box selected on the Basic Data page, the transcript includes an audit of academic requirement groups. Transcript type values are defined on the Transcript Type - Basic Data page.

If you select an advising transcript type, the Use Stored What-If, Database Report, and As of Date fields become available for entry.

Use Stored What-If

Select to process the batch of advisement reports based on stored what-if information for each student (as opposed to actual student academic career, academic program, academic plan and academic subplan information). For example, a student may have a stored what-if scenario set up for them that has an alternate combination of academic program, academic plan, academic subplan, requirement term, and so on. If the Use Stored What-If check box is selected, the system uses the hypothetical what-if data rather than the student's actual data from the Student Program/Plan component.

Database Report

Select this check box to update the academic advisement analysis database with the results of the transcript request (at the time of the Transcript Generation process). Specific data for each student based on each student's respective requirements is then available for query and reporting. For example, you may run an advisement report with the Student Group and Athlete options selected, thereby populating the analysis database with advising results for student athletes. You may then query those tables to create user configurable reports for all athletes at a later date.

As of Date

Set the As of Date field as appropriate to include or exclude future-dated academic programs, academic plans, academic subplans, conditions, and entity groups when you process any type of academic advising report.

At the start of the advising report process (on the Transcript Generation page), the system references the value in the As of Date field to determine which STUDENT_CAR_TERM records are active for each student. Active records are defined as rows on the Track Student Careers component, with an effective date that is equal to or less than the as-of date and with a program action of activate, data change, plan change, program change, or readmit. After the system identifies the active rows, it compares the student's career, program, plan, subplan, and requirement term information against the appropriate academic requirement groups. Appropriate academic requirement groups are defined as those with effective dates that are equal to or less than the start date of the student's requirement term. Regardless of the As of Date field value, the system evaluates all courses on a student's transcript, future-dated or otherwise.

Note. As delivered, the system populates the As of Date field by default to 01/01/3000, but you can modify the date each time you run the process. To set the As of Date field default to the current date, go to the Installation Student Administration page and clear the Transcript Default As of Date field.

Transcript Request Criteria	Select batch processing criteria and further describe the group. Select one of these values: <i>Academic Level:</i> If you select this option, the Career, Term, and Level fields become available for entry. The values in all three of these fields intersect to form a single criterion set. <i>Advisor:</i> If you select this option, the Advisor field becomes available for entry. <i>Career/Program/Plan:</i> If you select this option, the Career, Acad Program (academic program), and Acad Plan (academic plan) fields become available for entry. <i>Student Group:</i> If you select this option, the Group Name field becomes available for entry.
Career	Creates transcript requests for all students within the academic career you specify. Academic career values are defined on the Academic Career Table page. This field is required.
Acad Program (academic program)	Creates transcript requests for all students within the academic career and academic program that you specify. Academic program values are defined in the Academic Program Table component.
Acad Plan (academic plan)	Creates transcript requests for all students within the academic career, academic program, and academic plan that you specify. Academic plan values are defined on the Academic Plan Table page.
Term	Creates transcript requests for all students that are term activated in the academic career and academic level as of the term you specify. Term values are defined on the Term Table page. This field is required.
Academic Level	Creates transcript requests for all students within the academic career and academic level as of the term you specify. Academic level values are defined on the Academic Level Table page. This field is required.
Advisor	Creates transcript requests for all active students who are assigned to this advisor on the Student Advisor page. This field is required.
Group Name	Creates transcript requests for all students who are active within the group that you specify. Student group names are defined on the Student Group Table page and assigned to students on the Student Groups page.

Click the Run button to run this request. When you click the OK button, an Application Engine process scans the database and creates transcript requests for the students who match your selection criteria. When the Run Status for SRTSRQST process is Success, you can generate the transcripts on the Transcript Generation page. Be sure to click the Message Log link on the Process Detail page to note the system-generated transcript request numbers. You need these numbers to generate transcripts on the Transcript Generation page and to print transcripts on the Transcript Print page.

Using the Grade Review Transcript Release Process

Using the Grade Review Transcript Release process, you can update your students' fully graded date and grade review status in batch mode, and then process transcripts or degree audits for students who meet your specific run control parameters. Essentially, this process releases transcripts or degree audits only if a student's classes are fully graded for the term. If some required grades are missing, the process does not generate a transcript. Instead, it assigns a special grade review value to the student so that they can be easily identified for future processing.

Complete these steps to use the Grade Review process:

1. Set up grade review values on the Grade Review Table page.
2. Set specific grade bases as *required* on the Grading Scheme Table page.
3. Process grade reviews.
4. View the grade review information on the Student Grade Review page.
5. View fully graded date information on the Term Control Dates page.
6. View the transcripts through the Transcript Request component.

Pages Used to Run the Grade Review Process

Page Name	Definition Name	Navigation	Usage
Grade Review Table	GRD_REVIEW_TABLE	Set Up SACR, Product Related, Student Records, Grading, Grade Review, Grade Review Table	Define different values that you want to assign to students as a result of the grade review process. For example, <i>MISS</i> for missing grades, <i>PEND</i> for pending grade review, and <i>COMP</i> for completed all grades. The system assigns these values to students on the Term History - Student Grade Review page based on the status of the students' grades for the term you specify.

Page Name	Definition Name	Navigation	Usage
Grading Scheme Table	GRADING_SCHEME_TBL	Set Up SACR, Foundation Tables, Academic Structure, Grading Scheme Table, Grading Scheme Table	Define the grade bases that you want to require. The system references the Grade Required check box setting to determine if a student's transcript can be released or not. Students who are enrolled in classes with a grade basis that is set to Grade Required must have all of their grades entered and posted for a specific term in order for the system to release their transcript through the Grade Review process.
Grade Review	RUNCTL_SRGRDREV	Curriculum Management, Grading, Grade Review, Grade Review	Specify the group of students that you want to evaluate for fully graded data. Also, define other processing parameters and enter the values that you want to assign to the students' records. Run the Grade Review (SRPCGRDR) process.
Student Grade Review	STDNT_GRD_REVIEW	Records and Enrollment, Student Term Information, Term History	View or change the grade review value that the Grade Review process assigned, or enter a grade review value. Define grade review values on the Grade Review Table page.

Setting Up Grade Review Values

Access the Grade Review Table page (Set Up SACR, Product Related, Student Records, Grading, Grade Review, Grade Review Table).

Grade Review Table

Academic Institution:

PSUNV

PeopleSoft University

Academic Career:

UGRD

Undergraduate

Grade Review:

MISS

Find | View All

First

1 of 1

Last

*Effective Date:

01/01/1900

31

*Status:

Active

+ -

*Description:

Missing Grades

Short Description:

Missing

Grade Review Table page

- Effective Date

Enter an effective date for this grade review status. The effective date defines when the status that you select is valid.
- Status

Select a status for this grade review. Select *Active* when adding a new grade review status. The *Inactive* option should only be used if your institution will no longer use this grade review status.
- Description

Enter a description for the status. The description appears on the Student Grade Review page.
- Short Description

Enter a short description for the status.

Specifying Required Grade Bases

Access the Grading Scheme Table page (Set Up SACR, Foundation Tables, Academic Structure, Grading Scheme Table, Grading Scheme Table).

See Also

[Chapter 12, "Setting Up Grading," Defining Grading Schemes, page 290](#)

Defining Grade Review Parameters

Access the Grade Review page (Curriculum Management, Grading, Grade Review, Grade Review).

Grade Review

Run Control ID: PS

[Report Manager](#) [Process Monitor](#) Run

*Academic Institution:	PSUNV	PeopleSoft University
*Academic Career:	UGRD	Undergraduate
*Term:	0410	2000 Fall
*System Date:	07/10/2001	

Grade Review Values to Assign

Grade Review Status:	COMP	Completed all Required Grades
Grade Review Missing Grades:	MISS	Missing Grades
Grade Review Excl Acad Stand:	ACAD	Excluded due to Acad Standing

Processing Options

☒ Generate Transcript

Transcript Type:

☒ Set Fully Graded Date

☒ Grades Required

☒ Process Blank Grade Review

Process Following Grade Review Statuses

Find First 1 of 1 Last + -

Grade Review page (1 of 2)

Student Selection Criteria

Academic Program:

LAU

Liberal Arts Undergraduate

Academic Plan:

Academic Sub-Plan:

Academic Load:

Academic Level:

Degree Checkout Status:

Expected Graduation Term:

Student Group:

ATHL

Athlete

Exclude Following Academic Standings

Find

First

1 of 1

Last

*Academic Standing:

Grade Review page (2 of 2)

- Academic Institution

Select the institution for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.
- Academic Career

Select the academic career of students for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.
- Term

Select the term for which you want to run the grade review process. The system populates this field by default to the setting on the User Defaults 1 page.
- System Date

The process assigns this date to the student records when it assigns new grade review values. For example, if a student is fully graded and meets all other processing parameters, the student's grade review status is set to *COMP* on the Student Grade Review page, with an effective date equal to the system date. In addition, if you select the Set Fully Graded Date check box, the system sets the student's fully graded date to the system date on the Term Control Dates page.
- Grade Review Status

Select a status to assign to a student on the Student Grade Review page if the system finds him to be fully graded for the term.
- Grade Review Missing Grades

Select a status to assign to a student on the Student Grade Review page if the system finds the student to be in acceptable academic standing but lacking fully graded enrollment records for the term. If a student is neither fully graded nor in acceptable standing, the system assigns the value in the Grade Review Excl Acad Stand field to the student on the Student Grade Review page.

Grade Review Excl Acad Stand (grade review excluded due to academic standing)	Select a status to assign to a student on the Student Grade Review page if the system finds him to be fully graded but his academic standing for the term is equal to the value in the Academic Standing field. If a student is neither fully graded nor in acceptable standing, the system assigns the value in the Grade Review Excl Acad Stand field to the student on the Student Grade Review page.
Generate Transcript	Select to process transcripts for the students in your selected population. Warning! If you select the Generate Transcript check box and run the Grade Review process, the system immediately generates transcripts (not just transcript request numbers) for all students in your population. Depending on the size of your population and the transcript type you select, this process could take a substantial amount of time to complete.
Transcript Type	Select the type of transcript that you want to generate.
Report Format	If you select a transcript type that is an advising report, the Report Format field is available for entry. Select from these values: <i>Standard Report Format:</i> Indicates that the report is delivered to a page or a printer. <i>Analysis Database:</i> Indicates that the results of the report are written to the analysis database. The results are stored in computer-readable format so application programs can be written against the tables to create user configurable reports. (This is the only field value that refreshes the database tables.) <i>Completed Only:</i> Indicates that the report contains only those requirements that have been wholly completed. (Normally, the advising report marks incomplete requirement groups and requirements in bold, while completed requirement groups and requirements are not in bold.) <i>Incompleted Only:</i> Indicates that the report contains only those requirements that have not been wholly completed. (This field value can help a counselor determine exactly what a student needs to satisfy in order to graduate.)
Set Fully Graded Date	Select to set a student's fully graded date (on the Term Control Dates page) to the system date you specify in the System Date field. The system sets the fully graded date only if the process assigns a new grade review status to the student. If no grade review status is assigned, the fully graded date field does not update. Clear this check box if you never want to update the fully graded date.
Grades Required	Select to have the system use the Grade Required check box setting on the Grade Scheme Table page to determine if grades are missing. If you select this check box, the system only evaluates courses taken with grade bases for which the Grade Required check box is selected. If you clear this check box, students in the population will be set regardless of whether their grades are in.

Process Blank Grade Review	Select to include in your student selection students with no grade review value.
Grade Review Status	Enter the current grade review status of students that you want to process. Add rows to specify more than one valid grade review status value.
Academic Program	Select the academic program of the students you want to review.
Academic Plan	Select the academic plan of the students you want to review.
Academic Sub-Plan	Select the academic subplan of the students you want to review.
Academic Load	Select the academic load of the students you want to review for the term you specify.
Academic Level	Select the academic level (term begin) of the students you want to review for the term you specify.
Degree Checkout Status	Select the degree checkout status of the students you want to review.
Expected Graduation Term	Select the expected graduation term of the students you want to review.
Student Group	Select the student group of the students you want to review.
Academic Standing	Select the academic standing of students (on the Term History page for the term you specify) that you want to <i>exclude</i> from the grade review. Add rows to specify more than one type of academic standing value that you want to exclude from the review.

Click Run to run this request. PeopleSoft Process Scheduler runs the Grade Review Process Driver process at user-defined intervals. If you selected the Generate Transcripts check box, you can view the transcripts online or print them when the process finishes.

Producing Electronic Transcripts

After you have set up the TS130 controls and mapped your internal values within the EDI Manager, you can create electronic transcript requests and process outbound files. This section discusses how to:

- Enter electronic transcript request information.
- Enter the recipient's address information.
- Enter send options.
- View electronic transcript request history for a student.

See Also

[Chapter 14, "Setting Up Transcripts," Setting Up Electronic Transcript Processing, page 344](#)

Pages Used to Produce Electronic Transcripts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transcript Request	TSCRPT_REQUEST	Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Transcript Request	Enter general information about this transcript request.
Address	TSCRPT_ADDRESS	Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Address	Enter address information for the organization to which you are sending the electronic transcript.
Send Options	TSCRPT_EMAIL_SEND	Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Send Options	Specify the send method and the recipient's email information.
Request History	TSCRPT_HISTORY	Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Request History	View the electronic transcript request history for this student.

Entering Electronic Transcript Request Information

Access the Transcript Request page (Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Transcript Request).

Transcript Request		Address	Send Options	Request History
Ana Beck		SR0400		
Find View All First ◀ 1 of 1 ▶ Last				
Transcript Seq No:	1	On Request	Process + -	
Request Date:	07/16/2004			
*Academic Institution:	PSUNV	PeopleSoft University		
*Transcript Type:	Official Transcripts - All			
Request Reason:	Graduation			
Request Reason:				
Override Service Indicator	☒			
*Future Release:	Immediate Processing			
Academic Career:				
Term:				
Date to be Processed:	07/16/2004	Date Processed:		
User ID:	Locherty,Betty			

Transcript Request page

- Transcript Seq No** (transcript sequence number) The system assigns a sequential number to each request that you enter for the student.
- Request Date** The system displays the date on which you enter the request. When you enter a new request, the system uses the current date by default.
- Academic Institution** Select the academic institution for which you want to print the request. By default, the system selects the academic institution defined in the User Defaults component.
- Transcript Type** Select a transcript type with the correct detail that you want to report electronically. Only transcript types for which you have user security and that have valid careers for this student are available. Transcript type values are defined on the Transcript Type - Basic Data page.
- Request Reason** Select the request reason. Request reason values are delivered with your system as translate values. You can modify these values.
You can enter free-form text to further clarify the request reason in this field.

Override Service Indicator

Select this check box to have the system process the transcript for this student, regardless of whether the student has a service indicator with service impacts that match those specified for this transcript type on the Basic Data page. Service impacts that are listed on the Basic Data page and are attached to the student prevent a student from receiving a transcript. If you do not select this check box, the system enforces the service indicator rules and does not generate transcripts for a student with service impacts that match those on the Basic Data page for this transcript type.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Service Indicators."

Future Release

Select a future release to indicate that you want the system to generate the transcript at a later date. Future release values are delivered with your system as translate values. These translate values should not be modified in any way. Any modifications to these values require a substantial programming effort. Values are:

Degree Confer Date: The Career and Term fields become available for entry.

Grades Post: The Career and Term fields become available for entry.

Hold: The system sets the Date to be Processed field to the current date and is available for entry. This option indicates that you are going to process the request at a later and undetermined time. The system saves this request until you change the future release value and enter a specific print date.

Immediate Processing: The system sets the Date to be Processed field to the system date.

Specific Date: The system sets the Date to be Processed field to the current date and it is available for entry. You can enter a specific date for the transcript request to be processed through the Generate Electronic Transcript page.

Transfer Credit Post: The system sets the Date to be Processed field to the current date and it becomes available for entry. You can issue a transcript through the Generate Electronic Transcript page after the system articulates transfer credit to the student's academic record. Because this process is not automatic, you must still generate the electronic transcript on the Generate Electronic Transcript page.

Academic Career and Term	If available for entry, select the appropriate academic career and term values. You can issue a transcript later through the Generate Electronic Transcript page on the fully graded date—future release value of <i>Grades Post</i>—or when the degree confer date arrives for the student—future release value of <i>Degree Confer Date</i>. The system populates the Date to the Processed field with either the fully graded date from the Term Control Dates page in the Term Activation component, or the degree confer date from the Degree page in the Student Degrees component. Term values are defined on the Term Table page. To create transcripts for future release, enter the request parameters and save the request without processing it. To process and send the future release request later, enter into the Generate Electronic Transcript page a range of dates based on the Dates to be Processed field. The system processes requests for all electronic transcripts that have not yet been generated within the range you specify. After you process a transcript request, the system marks the report request ID as <i>Generated</i>, and the system excludes it from further batch processing.
Entered By	The system displays the user ID and name of the person who entered the request.
Process	Click to process the request immediately and send the report as indicated on the Send Options page. The system takes you to the Request History page. The Process button calls an Application Engine program that processes the request and creates the flat file. PeopleSoft PeopleCode, using Workflow, will send the resulting file as an email attachment if so requested on the Send Options page. The process updates the request status to be generated. If you also send the file by email, the process updates the request status to complete. If the student has a service indicator with an attached service impact that is defined on the transcript type setup, the system displays the Service Indicator page and indicates that it prevented the transcript due to negative service indicators.

Entering the Recipient's Address Information

Access the Address page (Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Address).

Transcript Request		Address		Send Options		Request History	
Ana Beck		SR0400					
Find View All First 1 of 1 Last							
Transcript Seq No: 1		On Request		Process			
Request Date: 07/16/2004							
Send to Student ☐		Specify External Org ID ☒					
Org ID: 000010146 		Location Nbr: 1  Long Beach City College					
Send to: Long Beach City College							
Country: USA  United States							
Address: 1234 Main Street 234 Third Street Long Beach, CA 90271		Edit Address					

Address page

- Send to Student** Select to automatically populate the Send to field with the student's name. The Address Type field becomes available.
- Address Type** Select the address type for the student to which you want to send this transcript. The system populates the address fields based on the address type you select. This field is available when you select the Send to Student check box.
- Specify External Org ID** (specify external organization ID) Select to choose an existing external organization. The system makes the Org ID and Location Nbr fields available.
- Org ID** (organization ID) This field becomes available when you select the Specify External Org ID check box. Select the organization to which you are sending the electronic transcript. Define external organizations on the Organization Table page. When you exit this field, the system automatically populates the Send to field with the organization's name.

Location Nbr (location number)

This field becomes available when you select the Specify External Org ID check box. Select the location number of the organization to which you are sending the electronic transcript. Define location numbers for external organizations on the Organization Location page. When you exit this field, the system automatically populates the address fields with the location address.

Send to

Enter the name of the recipient to whom you are sending the electronic transcript. If you select either the Send to Student check box or the Specify External Org ID check box, then this value populates automatically according to your selection. This value can be overwritten.

Country

Select the country of the recipient's address. When you exit this field, the system displays the address format associated with that country.

Edit Address

Click to enter a different address to which you want to send this transcript.

Entering Send Options

Access the Send Options page (Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Send Options).

Transcript Request | Address | **Send Options** | Request History

Ana Beck SR0400 

Find | View All | First 1 of 1 Last

Transcript Seq No:	1	On Request	Process

Request Date: 07/16/2004

Send Options: E-Mail

E-Mail Address: Person@Peoplesoft.com

File Name:

Output File Path: \\localhost\\temp

E-Mail Message: Attached you will find the requested transcript.

Send Options page

Send Options

Select the method that you want to use to send the TS130 file. Select *E-Mail* if you want to send the electronic transcript by email. The system sends the output file as soon as you run the Transcript Request process. Select *Place File in Directory* to enable you to transfer the file at a later time by using a file transfer protocol, such as the FTP.

E-Mail Address	Enter a valid email address to which the system sends the transcript.
File Name	The generated file name appears after processing. The naming convention is defined on the TS130 Setup page. The system inserts the control number before the file extension to identify unique files.
Output File Path	Insert the file path to which the system writes the TS130 file at the time it is generated. The system displays this value by default from the TS130 Setup page (or the Organization TS130 Setup page if the send to address is an organization with information in the Org TS130 Setup page). Users must have write permission for this specified directory to prevent runtime errors.
	Note. Regardless of your send option, you need to specify a directory to store the TS130 file because the email process picks the file up as an attachment and sends it by email from this directory. For example, you could use c:\temp\.
E-Mail Message	Enter free-form text that will appear in the body of the email.

Note. You can set up defaults for the Send Options, E-Mail Address, and Output File Path fields on the Organization TS130 Setup page.

Viewing Electronic Transcript Request History for a Student

Access the Request History page (Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Request, Request History).

Transcript Request
Address
Send Options
Request History

Ana Beck
SR0400


Find | View All
First 1 of 1 Last

Transcript Seq No: 1 Completed
Request Date: 07/16/2004
Academic Institution: PSUNV PeopleSoft University
Date to be Processed: 07/16/2004 **Date Processed:** 07/16/2004

Customize | Find | 
First 1-2 of 2 Last

DateTime	Name	File Name	Action	TS131 Status	TS131 Processed
07/16/2004 1:16PM	Locherty, Betty	etranscript_1.bt	E-Mail		
07/16/2004 1:16PM	Locherty, Betty	etranscript_1.bt	Generate		

Request History page

DateTime	Displays the date and time of the action performed on this request.
Name	Displays the user name of the user performing the action.

File Name	Displays the unique file name.
Action	Displays the various actions performed on this request. Values include <i>Generate</i> , <i>Batch Generate</i> , <i>E-Mail</i> , and <i>Batch E-Mail</i> .
TS131 Status	Displays the status of any incoming TS131 acknowledgements that have been processed for this request. Values include <i>Confirm</i> and <i>Reissue</i> .
TS131 Processed	Displays the date on which the sender processed the TS131 inbound file.

Producing Electronic Transcripts in Batch

This section provides an overview of producing electronic transcripts in batch and discusses how to:

- Generate electronic transcripts in batch.
- Send electronic transcripts in batch by email.
- Enter a text message on the request.

Understanding Producing Electronic Transcripts in Batch

The Generate Electronic Transcript page enables you to generate previously created TS130 requests that you saved through the Electronic Transcript Request page. The process combines transcripts from multiple requests when the requests specify the same recipient. This component is ideal for generating electronic transcripts requested for release on future dates or following specific events.

For example, students can request future release of their transcripts based on degree confer date, term grade posting date, transfer credit posting date, or a date you specify. When the future date arrives, you can access the Generate Electronic Transcript page, enter the transcript type that you want the system to process, enter a single date or a range of process dates, and generate the TS130 files. For example, if a student knows in March that he or she needs a transcript sent electronically to a specific institution on June 15, the date of graduation, he or she can enter this request and save it online in March with a future date of June 15 on the Transcript Request page. On June 15, the system can process this request through the Generate Electronic Transcript page and can generate this student's transcript electronically, along with all other requests scheduled for processing on this date.

After you run the process through the Generate Electronic Transcript page, you can access the TS130 files in the output directory indicated on the request, and you can send these files by email, in batch, through the E-Mail Electronic Transcript page. On the E-Mail Electronic Transcript page, enter the same run control that you used in the Generate Electronic Transcript process. Only those requests with a send option of email will appear. The batch generation process groups requests by email address and directory, thus forming virtual envelopes that can include several students' transcripts.

Pages Used to Produce Electronic Transcripts in Batch

Page Name	Definition Name	Navigation	Usage
Generate Electronic Transcript	RUNCTL_E_SRTSCPRT	Records and Enrollment, Transcripts, Electronic Transcripts, Generate Electronic Transcript, Generate Electronic Transcript	Generate previously created TS130 transcript requests that you saved through the Electronic Transcript Request page.
E-Mail Electronic Transcript	EMAIL_TS130	Records and Enrollment, Transcripts, Electronic Transcripts, EMail Electronic Transcript, EMail Electronic Transcript	Email TS130 requests in batch.
Transcript E-Mail Detail	EMAIL_TS130_SBP	Click the Notes and Details link on the Email Electronic Transcript page.	Enter a message to be delivered in the body of the email. This message overwrites the email messages for each individual request within this file.

Generating Electronic Transcripts in Batch

Access the Generate Electronic Transcript page (Records and Enrollment, Transcripts, Electronic Transcripts, Generate Electronic Transcript, Generate Electronic Transcript).

Generate Electronic Transcript

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PeopleSoft University

*Transcript Type:

Process Date Range

*From:

*Through:

Generate Electronic Transcript page

Academic Institution

Select the institution that the system should use in the process. Institution values are defined on the Academic Institution Table page.

- Transcript Type

Select the transcript type. Transcript type values are defined on the Transcript Type - Basic Data page. Be sure you select a transcript type that matches the pending requests that you want to generate.
- From and Through

Enter the range of dates for which you want to generate electronic transcripts. To generate electronic transcripts for one day, enter the same date in both fields.

Sending Electronic Transcripts in Batch by Email

Access the EMail Electronic Transcript page (Records and Enrollment, Transcripts, Electronic Transcripts, EMail Electronic Transcript, EMail Electronic Transcript).

Email Electronic Transcript

User ID: PS

Run Control ID: 1229640738

Process

Customize | Find | First 1 of 1 Last

Email	TS130 Control	Date Processed	Email Address	File Name	File Path	Notes and Details
☒						Notes and Details

Email Electronic Transcript

- Email

Select this check box if you want the process to send this file. Clear this check box for any row that has a file that should not be sent at this time.
- TS130 Control

Enter the date the TS130 was generated.
- E-Mail Address

Enter the email address of the recipient.
- File Name

Enter the generated file name of the TS130.
- File Path

Enter the file path where the file is located and will be picked up as an attachment in the email.
- Notes and Details

Click to access the Transcript E-Mail Detail page, where you can view the requests that are included in each flat file and the history of each request. You can also enter text that will be delivered in the body of the email.

Note. The email text entered here overwrites email message text on the request.

Entering a Text Message on the Request

Access the Transcript E-Mail Detail page (click the Notes and Details link on the Email Electronic Transcript page).

Transcript E-Mail Detail

User ID: PS
Run Control ID: 1
TS130 Control:
Message:

Transcript Requests
Find | View All
First 1 of 1 Last

EmplID: SR0400 Beck,Ana
Transcript Seq No: 1

Customize | Find |
First 1 of 1 Last

DateTime	File Name	Action	TS131 Status	TS131 Processed

Transcript E-Mail Detail page

Message Enter a message to be delivered in the body of the email. This message overwrites the email message for each individual request within this file.

Note. If you rerun the Generate Electronic Transcript process, the system deletes all email records under that run control value and creates new records.

Reviewing TS130 Outbound Transactions

The Electronic Transcript Query enables you to see the status of various electronic transcript requests based on the user who entered the request, student ID, request date, process date, or request status.

This section discusses how to review transcript request data.

Page Used to Review TS130 Outbound Transactions

Page Name	Definition Name	Navigation	Usage
Electronic Transcript Query	TRANSCRIPT_QUERY	Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Query, Electronic Transcript Query	View the status of various electronic transcript requests.

Reviewing Transcript Request Data

Access the Electronic Transcript Query page (Records and Enrollment, Transcripts, Electronic Transcripts, Electronic Transcript Query, Electronic Transcript Query).

Electronic Transcript Query

User ID:

Student ID:  Beck,Ana

Date From

From:  **Through:** 

Process Date Range

From:  **Through:** 

Request Status:  Fetch

ID		Requested	Date Processed	Status	Request
SR0400	Beck,Ana	07/16/2004	07/16/2004	Completed	Go to Request
SR0400	Beck,Ana	07/16/2004	07/16/2004	Generated	Go to Request

 Notify

Electronic Transcript Query page

User ID Enter the user ID of the person who completed the request if you want to view requests created by a single user.

Student ID Enter the student ID if you want to view requests for a specific student.

Date From	Enter dates in the From and Through fields to view electronic transcript requests with request date values within a certain date range. These two fields can contain the same date.
Process Date Range	Enter dates in the From and Through fields to view electronic transcript requests with process date values within a certain date range. Process date values are specified in the Date Processed field on the Transcript Request page.
Request Status	Select a request status to filter the status of requests you want to view. Values include: <i>Acknowledgement Received</i> , <i>Completed</i> , <i>Generated</i> , <i>On Request</i> , and <i>Reissue Requested</i> .
Fetch	Click to retrieve the results of your inquiry.
Go to Request	Click to go to the Electronic Transcript Request component for this request.

Processing TS131 Inbound Files

This section provides an overview of TS131 inbound files and discusses how to download TS131 files.

Understanding TS131 Inbound Files

Institutions that receive TS130 Electronic Transcripts from you should send back to you a Student Educational Record (Transcript) Acknowledgement, or TS131, file. This file confirms that the recipient received the record, and it ensures that the recipient received certain key elements as they were sent.

This process reconciles TS131 inbound files with individual electronic transcript requests. The process updates the Request History page in the Electronic Transcript Request component to indicate that it was successfully received or that the request needs to be reissued. You can query on which requests must be reissued through the Electronic Transcript Query page. Additionally, the Generate Electronic Transcript process also regenerates requests marked as Reissue.

Page Used to Process TS131 Inbound Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Download TS131	RUNCTL_TS131_DWNLD	Records and Enrollment, Transcripts, Electronic Transcripts, Download TS131, Download TS131	Download TS131 files.

Downloading TS131 Files

Access the Download TS131 page (Records and Enrollment, Transcripts, Electronic Transcripts, Download TS131, Download TS131).

Download TS131

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

File, List File or Directory

☐ Single File

☐ File List Driven

☒ Directory

File Pattern:

*Input/Output file:

Download TS131 page

Single File	Select this option to process a single file. The File Name field appears.
File List Driven	Select this option to process a list of files. Enter the name of the file that contains a list of files that you want to process in the File Name field.
Directory	Enter the name of the file if you selected the Single File orFile List Driven option.
File Pattern	Enter the pattern of the file names that you want to process. For example, enter *.txt to process all text files in the directory that you specified. This field appears if you selected the Directory option.
Input/Output file	Enter the path to the file or files that you want to process.

Note. You must enter the final slash in the file path.

Reviewing Student Transcript Request History

This section lists a prerequisite and discusses how to run a transcript request query.

Prerequisite

Before you can search for a transcript request history, you must first have made at least one transcript request for a student.

Page Used to Review Student Transcript Request History

Page Name	Definition Name	Navigation	Usage
Transcript Request Inquiry	SSR_TSRQST_INQ	Records and Enrollment, Transcripts, Transcript Request Inquiry, Transcript Request Inquiry	List all of the transcript requests for a specific student.

Running a Transcript Request Query

Access the Transcript Request Inquiry page (Records and Enrollment, Transcripts, Transcript Request Inquiry, Transcript Request Inquiry).

Transcript Request Inquiry

User ID PS

***Academic Institution:** PeopleSoft University

Transcript Type:

***Student ID** SRTS0001 David Losholl

☒ **Flexible Transcript**

Transcript History

First 1 of 1 Last

General Information
Additional Information

Report Request Nbr	Transcript Type	Transcript Type	Flexible Transcript?	Request Date	Status
000000984	ALLOF	Official Transcripts - All	Yes	11/03/2006	On Request

Transcript Request Inquiry page

Academic Institution Select the institution for which the transcript was generated. Institution values are defined on the Academic Institution Table page.

Transcript Type Select the transcript type. Transcript type values are defined on the Transcript Type - Basic Data Page.

Student ID	Enter the ID for the student whose transcript request history you want to review.
Flexible Transcript	Select this check box to search for dynamically created transcripts only.
Search	When you click this button, the system displays transcript requests that meet the selection criteria you selected.

Purging Transcripts

This section lists a prerequisite and discusses how to purge transcript reports.

To purge transcripts, use the Purge Transcript Reports component.

Note. The Transcript Purge (RUNCTL_SRTRPURG) component still exists in the system.

Use this component to purge COBOL based transcripts.

Prerequisite

Before you can purge transcript requests and transcripts, you must create transcript requests.

Page Used to Purge Transcripts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Purge Transcript Reports	SSR_RC_TSRPT_PURGE	Records and Enrollment, Transcripts, Purge Transcript Reports, Purge Transcript Reports	Purge transcript requests, including transcript results, if any. The system purges all transcript reports within the parameters that you specify.

Purging Transcript Reports

Access the Purge Transcript Reports page (Records and Enrollment, Transcripts, Purge Transcript Reports, Purge Transcript Reports).

Purge Transcript Reports

Run Control ID: 1159470512 [Report Manager](#) [Process Monitor](#) Run

Purge Selection Criteria

☐ Purge All Results
 ☒ Select Results to Purge

☒ Purge Report Requests and Logs

Academic Institution: PeopleSoft University

Transcript Type: Unofficial Transcript-- All

Request Date From	Request Date To	Request Print Date From	Request Print Date To	Request User ID		
01/01/2007	03/31/2007				+	-

Purge Transcript Reports page

Note. You can enter any or all of the parameters on the page to select the appropriate transcript reports to purge.

Purge All Results

Select this option to purge all results.

Warning! Selecting the Purge All Results option will override the Freeze Record flag set on the report request record and will delete all data from the results tables.

If you also select the Purge Report Requests and Logs option, all associated request records will also be purged, even if the Freeze Record flag is set.

Select Results to Purge

Select this option to purge by transcript type parameter, date range, or user ID selection.

Purge Report Requests and Logs

When this option is selected, the transcript requests that all information associated with the request will be deleted. Requests will not appear on the Transcript Request Inquiry after the process runs.

Academic Institution

Enter the institution for which you want to purge transcripts. This value determines the availability of transcript types in the Transcript Type field.

Transcript Type

Enter the transcript type for which you want to purge transcripts.

Request Date From and Request Date To

Enter values that specify purge parameters. The system purges transcript requests created on and including these dates. The request date is the date that the transcript request number is created.

Request Print Date From and Request Print Date To	Enter values that specify purge parameters. The system purges transcript requests printed on and including these dates. The request print date is not a literal definition. The request print date refers to the date on which the transcript is generated and available for printing. For online transcript requests, this value is provided by the value in the Print Date field on the Transcript Request Header page. For batch transcript requests, this date is the date that the transcript is generated.
Request User ID	Select an ID from your user ID list. The system purges transcript requests and print requests initiated by this user.

Click Run to run this request. PeopleSoft Process Scheduler runs the Purge Transcript Reports process at user-defined intervals.

Using Self-Service Transcripts

If your institution has licensed PeopleSoft Campus Self Service, your students can request official and unofficial transcripts through the self-service pages described in the following chapters.

See Also

PeopleSoft Campus Self Service 9.0 PeopleBook, "Using Student Center"

Chapter 46

Consolidating and Reporting Academic Statistics

This chapter provides overviews of consolidating and reporting academic statistics, the consolidated statistics processes, and the Consolidate Academic Statistics process (SRPCCONP) calculations, and discusses how to:

- Perform academic statistics consolidation.
- View consolidated academic statistics for individual students.
- View consolidated academic statistics for groups of students.
- Produce veteran reports.
- Produce Nation Student Clearinghouse (NSC) extracts.

Understanding Consolidating and Reporting Academic Statistics

With the Consolidate Academic Statistics process (SRPCCONP), you can capture demographic and statistical information about your students, reporting these students under one primary academic career and program for a statistical period of time. If a student is active in multiple academic careers or programs within one or more terms of an academic statistics period, the process combines the student's academic career, program, level, and load information, based on the student's academic career and program that have the lowest primacy number. Your institution can report each student under one academic career and program for a statistical period of time and have the multiple academic level, load, and other statistics consolidated. You can then use these consolidated academic statistics to meet reporting requirements—such as Integrated Postsecondary Education Data System (IPEDS), NSC, and veteran's reporting.

After your institution completes the prerequisite setup for consolidating and reporting academic statistics, you are ready to capture and consolidate academic statistics for students who are active in terms at the academic institution for a given academic statistics period. You can, through the Consolidated Statistics page, run three COBOL/SQL processes:

- Take Term Statistics Snapshot (SRPCCONA).
- Recurring Term Snapshot (SRPCCONU).
- Consolidate Academic Statistics (SRPCCONP).

Important! To gather statistics that reflect different times of the year, you must run the Recurring Term Snapshot process (SRPCCONU) and the Consolidate Academic Statistics process (SRPCCONP) on a regular basis because the statistics themselves are based on the run date, not on the snapshot date. The processes use the snapshot date to locate the valid academic career and term combinations to include in the calculations.

After you have run the Consolidate Academic Statistics process (SRPCCONP) and are satisfied with the statistical results, you can then create reports based on the calculations found in the consolidated statistics table. The PeopleSoft system provides several reporting features—such as veterans, NSC—that use the Consolidate Academic Statistics process results. Or you can create other reports to meet the needs of your institution. This chapter discusses the delivered reporting features.

See Also

[Chapter 15, "Preparing to Consolidate and Report Academic Statistics," page 353](#)

Understanding Consolidated Statistics Processes

Before you run any of the consolidated statistics processes, it is important to understand when to use each process and how each process functions. This section summarizes each process, describes the common functionality shared between the processes, and outlines how each application process functions.

Take Term Statistics Snapshot Process

The Take Term Statistics Snapshot process (SRPCCONA) takes a term snapshot of every academic career and term combination listed in the grid in the lower portion of the Consolidated Statistics process page, where the snapshot date is less than or equal to the system date. The process considers as valid only the academic career and term combinations listed on the Academic Statistics Period page for the academic statistics period for which you run the process.

Run the process only when the consolidation trigger for the given academic statistics period is set to *Consolidation Date*. With such a consolidation trigger, this process is a precursor to running the Consolidate Academic Statistics process (SRPCCONP).

The process stores results in a temporary holding table (PS_STDNT_CARTRM_PD) for future use. This table has no corresponding page in which to view the stored data. There may be several rows of information in this table for one student per academic statistics period, depending on the academic career, term, and snapshot date combination. For example, on the Academic Statistics Period page, you might have set the following snapshot dates:

<i>Academic Career</i>	<i>Term</i>	<i>Snapshot Date</i>
BUSN	0505 (fall semester 2003)	09/20/03
BUSN	0518 (spring semester 2004)	02/01/04
LAW	0507 (fall quarter 2003)	09/15/03
LAW	0512 (spring quarter 2004)	01/30/04

Suppose that student A is in both the BUSN and LAW academic careers. In this scenario, after all term snapshots have been run, there will be four rows for student A in the temporary holding table PS_STDNT_CARTRM_PD.

Whenever you select *Consolidation Date* as your consolidation trigger for the academic statistics period, you must run two processes—the Term Snapshot process and the Consolidate Academic Statistics process. With such a consolidation trigger, the Consolidate Academic Statistics process consolidates all of a student's data that is found in the temporary holding table for a specific academic statistics period, calculating only one row of data for each student within an academic statistics period. The Consolidate Academic Statistics process writes these results to the consolidated statistics table (PS_STDNT_CONS_STAT). You can view many of the results from the Consolidate Academic Statistics process in the Student Consolidated Statistics component.

Recurring Term Snapshot Process

The Recurring Term Snapshot process (SRPCCONU) functions like the Take Term Statistics Snapshot process (SRPCCONA), except that you set up the process, through PeopleSoft Process Scheduler, to run regularly with a PeopleTools database agent utility. The Recurring Term Snapshot process searches for and takes term snapshots for an academic statistics period. The process takes a snapshot when the system date is equal to the term snapshot date as defined for the academic statistics period on the Academic Statistics Period page.

Consolidate Academic Statistics Process

The Consolidate Academic Statistics process (SRPCCONP) combines all of a student's valid academic statistics into one consolidated record.

You must run the Consolidate Academic Statistics process for every academic statistics period, regardless of the consolidation trigger for the academic statistics period. For academic statistics period where the consolidation trigger is set to *Consolidation Date*, you must first run either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) for all academic career, term, and snapshot date combinations of an academic statistics period before running the Consolidate Academic Statistics process. For academic statistics periods where the consolidate trigger is set to *As of Date* or *As of Today*, you need run only the Consolidate Academic Statistics process. The Consolidate Academic Statistics process uses the SRPCCONS program to calculate results, which the system then stores in the PS_STDNT_CONS_STAT table.

Regardless of the consolidation trigger for your academic statistics period, when a student is active in more than one academic career and academic program during the same academic statistics period, the Consolidate Academic Statistics process locates the student's primary academic career and program in two ways: by the academic careers and programs in which the student is active, and by the primacy number on the academic career and program. Because many federal and state reports require that you count students under one academic career and program even if the student is actively enrolled in more than one, the process combines all of the academic level, load, career, and program information for each student, based upon the primacy number you give to the academic career and program. The process reports the student based upon the student's academic career and program that has the lowest primacy number at the institution.

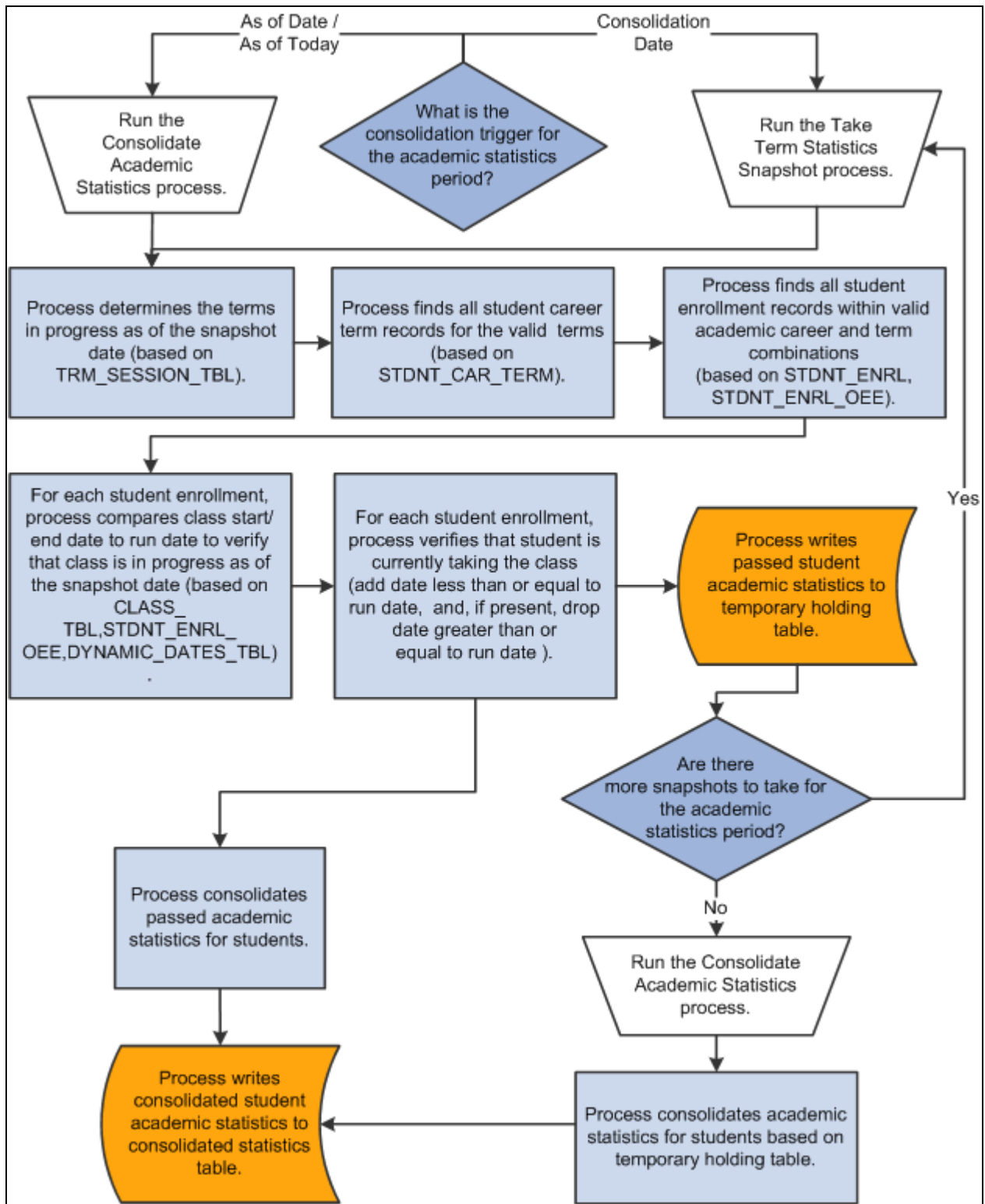
Important! You should run the Consolidate Academic Statistics process at night, during the weekend, or at any other time with reduced demands on the system.

Common Functionality Shared Between Processes

Before you run any of the consolidated statistics processes, it is important to understand how the processes locate which student data to include in their results. First, the processes locate the valid academic career and term combinations that are in progress as of the snapshot date. After the processes locate the valid academic career and term combinations, they gather all of the career-term records for students active in these academic career and term combinations, excluding any student who has completed their degree, except within the student's degree completion term. After the processes gather the applicable student career-term records, they further gather these students' enrollment records and compare the start and end dates for all classes in which the student is actively enrolled to the snapshot date to determine if a student's class units should count towards her or his academic level and load calculation. For example, the process excludes a student's class units if the student has enrolled in the class for a future session. This structure assists nonterm-based institutions in identifying a student's status at any given point in time, such as a student's primary academic program, primary academic career, term, academic level, academic load, and current and cumulative career-term statistics.

Flow Chart of Consolidated Statistics Processes

The following diagram illustrates when to run the Consolidate Academic Statistics process (SRPCCONP) and the Take Term Statistics Snapshot process (SRPCCONA) and, when initiated, how these processes function:



Example flows of consolidated academic statistics processes

Understanding Consolidate Academic Statistics Process Calculations

After you run the Consolidate Academic Statistics process (SRPCCONP), the system stores your results in the consolidated statistics table (PS_STDNT_CONS_STAT). You can use the Student Consolidated Stats and the Mass Consolidated Statistics components to view and edit many of the process calculations stored in the consolidated statistics table.

Use the following table to view the logic behind how the SRPCCONS program, which is part of the Consolidate Academic Statistics process (SRPCCONP), calculates each student's consolidated academic statistics. The Consolidate Academic Statistics process stores these vital statistics into one table—the Consolidated Statistics table (PS_STDNT_CONS_STAT)—which you can access for a specific student through the Student Consolidated Stats component, for a group of students through the Mass Consolidated Statistics component, or through SQL select statements when you query the database. The table contains over a hundred data elements—only the most vital of these are available for inquiry online. The PeopleSoft system has decided which possible statistics the process includes based upon guidelines of federal reports such as NSC, IPEDS, and IRS, and from feedback from our clients.

This table describes each of the fields that you can view through either the Student Consolidated Stats component or the Mass Consolidated Statistics component, and all other fields found in the PS_STDNT_CONS_STAT table. All descriptions in the table are listed in the order in which they appear in the record definition:

<i>Field</i>	<i>Logic</i>
EMPLID (EmplID)	Populated from the corresponding field on the STDNT_CAR_TERM record for the student's primary academic program.
INSTITUTION (Academic Institution)	Originated from input through the Consolidated Statistics process page.
ACAD_STATS_PERIOD (Academic Statistics Period)	Originated from input through the Consolidated Statistics process page.
CONS_STATUS (Consolidation Status)	Result of the Consolidate Academic Statistics process (SRPCCONS). If successful, then the program logic sets the status to S (success).

Field	Logic
ACAD_CAREER (Academic Career)	Populated from the corresponding field on the STDNT_CAR_TERM record. If the academic statistics period has <i>As of Date</i> or <i>As of Today</i> (system date) for its trigger, then that date triggers the cut-off for the admit term. If the academic statistics period has <i>Consolidation Date</i> for its trigger, then that date triggers the cut off for the admit term (same as the <i>As of Date</i> or <i>As of Today</i> trigger). If more than one academic career passes these criteria, then the program logic locates the active academic career. If two academic careers are active on the same date, then the program logic looks at the primacy number. The lowest number takes precedence. If the academic careers have the same primacy number, then the program logic will compare the effective dates (EFFDT). The later date takes precedence.
STRM (Term)	Populated with values from the corresponding field on the STDNT_CAR_TERM record. If the academic statistics period has <i>As of Date</i> or <i>As of Today</i> for its trigger, then the program logic reports the term from the student's primary academic program. If the academic statistics period has <i>Consolidation Date</i> for its trigger, then the program logic reports the term from the student's primary academic program in relation to the consolidation as of date. For example, if you take snapshots for terms 0330, 0350, and 0370 but your consolidation as of date falls within term 0350, then the program logic reports term 0350.
WITHDRAW_CODE (Withdrawal/Cancel)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.
WITHDRAW_REASON (Withdrawal/Cancel Reason)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.
WITHDRAW_DATE (Withdrawal/Cancel Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.

Field	Logic
LAST_DATE_ATTENDED (Last Date of Attendance)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.
STDNT_CAR_NBR (Student Career Number)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program.
ACAD_PROG_PRIMARY (Primary Academic Program)	Calculated from the corresponding field on the STDNT_CAR_TERM record. If a student has two or more active academic programs, the program logic calculates the primary academic program according to the primacy value of the academic programs. It is the calculated academic program that will be reported.
ACAD_LOAD_APPR (Approved Academic Load)	Populated from the corresponding field on the STDNT_CAR_TERM record.
ACADEMIC_LOAD (Academic Load)	Computed by the SRPCRULE/SRPCLOAD process based on units in progress and using academic load rules according to the academic statistics period. See the logic description for the OVRD_ACADEMIC_LOAD field.
OVRD_ACADEMIC_LOAD (Override Academic Load)	The system sets this field value to <i>N</i> , indicating that the Academic Load field (ACADEMIC_LOAD) contains the value of the calculated academic load (ACADEMIC_LOAD_CL). You can override the calculated academic load (ACADEMIC_LOAD_CL) by selecting the Override Academic Load check box (OVRD_ACADEMIC_LOAD) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Academic Load field (ACADEMIC_LOAD). Selecting this check box sets the OVRD_ACADEMIC_LOAD field value to <i>Y</i> .
ACADEMIC_LOAD_CL (Academic Load Calculated)	Computed by the SRPCRULE/SRPCLOAD process, based on units in progress and using academic load rules according to the academic statistics period. See the logic description for the OVRD_ACADEMIC_LOAD field.
FA_LOAD (Financial Aid Load)	Computed by SRPCRULE/SRPCLOAD.

Field	Logic
ACADEMIC_LOAD_NSLC (NSC Academic Load)	Calculated from units in progress and using NSC academic load rules (PS_ACAD_LOAD2_TBL) according to the academic statistics period. You can override the calculated result by selecting the Override Academic Load check box in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for this field.
ACAD_LOAD_NSLC_CL (NSC Academic Load Calculated)	Calculated from units in progress and using NSC academic load rules (PS_ACAD_LOAD2_TBL) according to the academic statistics period.
ACAD_LEVEL_PROJ (Academic Level - Projected)	Computed by SRPCRULE/SRPCLVL.
ACAD_LEVEL_PROJ_CL (Academic Level Proj Calculated)	Computed by SRPCRULE/SRPCLVL.
ACAD_LEVEL_BOT (Academic Level - Term Start)	Computed by the SRPCRULE/SRPCLVL process based on cumulative units and using the academic level rules according to the Academic Level Table page.
ACAD_LEVEL_BOT_CL (Academic Level BOT Calculated)	Computed by the SRPCRULE/SRPCLVL process based on cumulative units and using the academic level rules according to the Academic Level Table page.
ACAD_LEVEL_EOT (Academic Level - Term End)	Computed by SRPCRULE/SRPCLVL. See the logic description for the OVRD_ACAD_LVL_ALL field.
ACAD_LEVEL_EOT_CL (Academic Level EOT Calculated)	Computed by SRPCRULE/SRPCLVL. See the logic description for the OVRD_ACAD_LVL_ALL field.

Field	Logic
ACAD_LEVEL_IPEDS (IPEDS Academic Level)	Calculated from cumulative units at the end of the term or using academic level and IPEDS academic level mapping according to the Level/Load Rules Table page. You can override the calculated result by selecting the Override All Academic Levels check box in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for this field. See the logic description for the OVRD_ACAD_LVL_ALL field.
ACAD_LEVEL_IPED_CL (IPEDS Academic Level Calculated)	Calculated from cumulative units and using academic level and IPEDS academic level mapping according to the Level/Load Rules Table page. See the logic description for the OVRD_ACAD_LVL_ALL field.
NSLDS_LOAN_YEAR (NSLDS Loan Year)	Computed by SRPCRULE/SRPCLVL.
OVRD_ACAD_LVL_PROJ (Override Projected Level)	Populated from the corresponding field on the STDNT_CAR_TERM record.
OVRD_ACAD_LVL_ALL (Override All Academic Levels)	Populated from the corresponding field on the STDNT_CAR_TERM record. The system sets this field value to <i>N</i>, indicating that the IPEDS Academic Level field (ACAD_LEVEL_IPEDS) and the Academic Level - Term End field (ACAD_LEVEL_EOT) contain the value of the respective calculated academic levels (ACAD_LEVEL_IPED_CL and ACAD_LEVEL_EOT_CL). You can override the calculated academic levels (ACAD_LEVEL_IPED_CL) and (ACAD_LEVEL_EOT_CL) by selecting the Override Units For Progress check box (OVRD_ACAD_LVL_ALL) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the IPEDS Academic Level field (ACAD_LEVEL_IPEDS) and Academic Level - Term End field (ACAD_LEVEL_EOT). Selecting this check box sets the OVRD_ACAD_LVL_ALL field value to <i>Y</i>.

Field	Logic
ELIG_TO_ENROLL (Eligible to Enroll)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TAKEN_PRGRSS (Units Taken for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_UNT_TAKEN_PRG field.
UNT_TAKEN_PRGRS_CL (Calculated Progress Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_UNT_TAKEN_PRG field.
OVRD_UNT_TAKEN_PRG (Override Units for Progress)	The system sets this field value to <i>N</i> , indicating that the Units Taken For Progress field (UNT_TAKEN_PRGRSS) contains the value of the calculated progress units (UNT_TAKEN_PRGRS_CL). You can override the calculated progress units (UNT_TAKEN_PRGRS_CL) by selecting the Override Units For Progress check box (OVRD_UNT_TAKEN_PRG) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Units Taken for Progress field (UNT_TAKEN_PRGRSS). Selecting this check box sets the OVRD_UNT_TAKEN_PRG field value to <i>Y</i> .
UNT_PASSED_PRGRSS (Units Passed for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TAKEN_GPA (Units Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_PASSED_GPA (Units Passed Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TAKEN_NOGPA (Units Taken Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_PASSED_NOGPA (Units Passed Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).

Field	Logic
UNT_INPROG_GPA (Units In Progress - GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_INPROG_NOGPA (Units In Progress - Not for GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
GRADE_POINTS (Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_AUDIT (Units Audited)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TRNSFR (Units Transferred)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_TAKEN_GPA (Transfer Taken for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_TAKEN_NOGPA (Transfer Taken Not for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_PASSED_GPA (Transfer Passed for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_PASSED_NOGPA (Transfer Passed Not for GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TRF_GRADE_POINTS (Transfer Grade Points)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TEST_CREDIT (Units From Test Credit)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_OTHER (Units From Other Credit)	Populated from the corresponding field on the STDNT_CAR_TERM record.

Field	Logic
UNT_TAKEN_FA (Fin Aid Progress Units Taken)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_PASSD_FA (Fin Aid Progress Units Passed)	Populated from the corresponding field on the STDNT_CAR_TERM record.
UNT_TAKEN_FA_GPA (FA Units Taken Toward GPA)	Populated from the corresponding field on the STDNT_CAR_TERM record.
GRADE_POINTS_FA (Financial Aid Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
UNT_TERM_TOT (Total Term Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
RESET_CUM_STATS (Reset Cum Stats at Term Start)	Currently not in use.
TOT_TAKEN_PRGRSS (Total Taken for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_PRGRSS (Total Passed for Progress)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_GPA (Total Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_GPA (Total Passed Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_NOGPA (Total Taken Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_NOGPA (Total Passed Not Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).

Field	Logic
TOT_INPROG_GPA (Total In Progress - GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_INPROG_NOGPA (Total In Progress - Not for GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_AUDIT (Total Audited)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TRNSFR (Total Transferred)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TEST_CREDIT (Total From Test Credit)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_OTHER (Total From Other Credit)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_CUMULATIVE (Total Cumulative Units)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_TOT_CUM field.
TOT_CUMULATIVE_CL (Total Cumulative Units Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). See the logic description for the OVRD_TOT_CUM field.
OVRD_TOT_CUM (Override Total Cumulative Unit)	The system sets this field value to <i>N</i> , indicating that the Total Cumulative Units field (TOT_CUMULATIVE) contains the value of the calculated total cumulative units (TOT_CUMULATIVE_CL). You can override the calculated total cumulative units (TOT_CUMULATIVE_CL) by selecting the Override Total Cumulative Unit check box (OVRD_TOT_CUM) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Total Cumulative Units field (TOT_CUMULATIVE). Selecting this check box sets the OVRD_TOT_CUM field value to <i>Y</i> .

Field	Logic
TOT_GRADE_POINTS (Total Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_FA (Total Fin Aid Units Taken)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_PASSD_FA (Total Fin Aid Units Passed)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_TAKEN_FA_GPA (Total Fin Aid Taken Toward GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
TOT_GRD_POINTS_FA (Total Fin Aid Grade Points)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
FORM_OF_STUDY (Form of Study)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. See the logic description for the OVRD_FORM_OF_STUDY field.
FORM_OF_STUDY_PD (Form of Study for Period)	Used in the United States, specifically for IRS reporting in a delivered report in the database. When you have an academic statistics period that consolidates several terms: If the latest term form of study equals <i>Enrollment</i> and units equals 0, then the program logic populates FORM_OF_STUDY_PD with the <i>prior</i> term's form of study value. If the latest term form of study equals <i>Enrollment</i> and units are greater than 0, then the program logic populates FORM_OF_STUDY_PD with the <i>latest</i> term's form of study value.
FORM_OF_STUDY_CL (Form of Study Calculated)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. See the logic description for the OVRD_FORM_OF_STUDY field.

Field	Logic
OVRD_FORM_OF_STUDY (Override Form of Study)	The system sets this field value to <i>N</i> , indicating that the Form of Study field (FORM_OF_STUDY) contains the value of the calculated form of study (FORM_OF_STUDY_CL). You can override the calculated form of study (FORM_OF_STUDY_CL) by selecting the Override Form of Study check box (OVRD_FORM_OF_STUDY) in the Mass Consolidated Statistics component or the Basic Data page in the Student Consolidated Stats component, then selecting a new value for Form of Study field (FORM_OF_STUDY). Selecting this check box sets the OVRD_FORM_OF_STUDY field value to <i>Y</i> .
TERM_TYPE (Term Type)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic career.
CLASS_RANK_NBR (Class Rank Nbr)	Populated from the corresponding field on the STDNT_CAR_TERM record.
CLASS_RANK_TOT (Class Rank Total)	Populated from the corresponding field on the STDNT_CAR_TERM record.
SEL_GROUP (Tuition Group)	Populated from the corresponding field on the STDNT_CAR_TERM record.
BILLING_CAREER (Billing Career)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic career and primary academic program.
UNIT_MULTIPLIER (Unit Multiplier)	Populated from the corresponding field on the STDNT_CAR_TERM record.
ACAD_YEAR (Academic Year)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic career and primary academic program.
CUR_RESIDENT_TERMS (Current In Residence Terms)	Populated from the corresponding field on the STDNT_CAR_TERM record.

Field	Logic
TRF_RESIDENT_TERMS (Transfer In Residence Terms)	Populated from the corresponding field on the STDNT_CAR_TERM record.
CUM_RESIDENT_TERMS (Cumulative In Residence Terms)	Computed by the Consolidate Academic Statistics process (SRPCCONS).
REFUND_PCT (Refund Percentage)	Populated from the corresponding field on the STDNT_CAR_TERM record.
REFUND_SCHEME (Refund Scheme)	Populated from the corresponding field on the STDNT_CAR_TERM record.
PRO_RATA_ELIGIBLE (Pro-rata Eligible)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic career and primary academic program.
FULLY_ENRL_DT (Fully Enrolled Date)	Populated from the corresponding field on the STDNT_CAR_TERM record.
FULLY_GRADED_DT (Fully Graded Date)	Populated from the corresponding field on the STDNT_CAR_TERM record.
EXT_ORG_ID (External Org ID)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
COUNTRY (Country)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
STUDY_AGREEMENT (Study Agreement)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.

Field	Logic
START_DATE (Start Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
END_DATE (End Date)	Populated with values from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic program. Relates to external study only, as entered through the External Study page in the Term Activation component.
CUR_GPA (Current GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS). If the academic statistics period has <i>As of Date</i> or <i>As of Today</i> for its trigger, then the program logic uses the current GPA. If the academic statistics period has <i>Consolidation Date</i> for its trigger, the program logic uses the current term GPA. If a student is active in multiple programs and careers with different grading bases (for example, a 100-point scale and a 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_GPA field.
GPA_CL (GPA Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). If the academic statistics period has <i>As of Date</i> or <i>As of Today</i> for its trigger, then the program logic uses the current GPA. If the academic statistics period has <i>Consolidation Date</i> for its trigger, the program logic uses the current term GPA. If a student is active in multiple programs and careers with different grading bases (for example, a 100-point scale and a 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_GPA field.

Field	Logic
OVRD_GPA (Override GPA)	The system sets this field value to <i>N</i> , indicating that the Current GPA field (CUR_GPA) contains the value of the calculated GPA (GPA_CL). You can override the calculated GPA (GPA_CL) by selecting the Override GPA check box (OVRD_GPA) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Current GPA field (CUR_GPA). Selecting this check box sets the OVRD_GPA field value to <i>Y</i> .
CUM_GPA (Cumulative GPA)	Computed by the Consolidate Academic Statistics process (SRPCCONS). Total grade points divided by total units. If the student is active in multiple programs and careers with different grading bases (for example, 100-point scale and 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_CUM_GPA field.
CUM_GPA_CL (Cumulative GPA Calculated)	Computed by the Consolidate Academic Statistics process (SRPCCONS). Total grade points divided by total units. If the student is active in multiple programs and careers with different grading bases (for example, 100-point scale and 4-point scale), then the program logic reports only the student's primary career and program GPA. See the logic description for the OVRD_CUM_GPA field.
OVRD_CUM_GPA (Override Cum GPA)	The system sets this field value to <i>N</i> , indicating that the Cumulative GPA field (CUM_GPA) contains the value of the calculated GPA (CUM_GPA_CL). You can override the calculated cumulative GPA (CUM_GPA_CL) by selecting the Override Cum GPA check box (OVRD_CUM_GPA) in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component, then selecting a new value for the Cumulative GPA field (CUM_GPA). Selecting this check box sets the OVRD_CUM_GPA field value to <i>Y</i> .
OVRD_TUIT_GROUP (Override Tuition Group)	Populated from the corresponding field on the STDNT_CAR_TERM record.

<i>Field</i>	<i>Logic</i>
OVRD_WDRW_SCHED (Override Withdrawal Schedule)	Populated from the corresponding field on the STDNT_CAR_TERM record based on the student's primary academic career and primary academic program.
TUITION_RES_TERMS (Tuition Residency)	Populated from the corresponding field on the STDNT_CAR_TERM record.
TC_UNITS_ADJUST (TC Units Adjustment)	Populated from the corresponding field on the STDNT_CAR_TERM record.
STDNT_COHORT_PRIM (Primary Student Cohort)	The Consolidate Academic Statistics process (SRPCCONS) reports one student attribute only for cohort processing. Define student attributes and their valid values on the Student Attributes Table page. Define the student attribute for cohort reporting at your institution on the Institution 3 page. When you run the process, it calls, for each student, a routine to retrieve the student's most primary student attribute value for the specific student attribute for cohort value that you define on the Institution 3 page. Assign student attributes and values to students on the Student Attributes page of the Student Program/Plan component.
ETHNIC_GROUP_SR (Ethnic Group)	Populated from joining the ETHNICITY_DTL record which contains the ETHNIC_GRP_CD against the ETHNIC_GRP_TBL which contains ETHNIC_GROUP, which is reported. Note. The field value is derived according to IPEDS reporting requirements if the academic statistics type is identified as IPEDS. See Chapter 15, "Preparing to Consolidate and Report Academic Statistics," Setting Up Statistic Period Types, page 358.
AGE_CATEGORY_SR (Age Category)	Populated from the corresponding field on the PERSON record. Age categories are defined per IPEDS rules. The program logic calculates age by using a student's birth date from personal data (based on system date) and comparing their birth date to the as of date, as of today date (system date), or consolidation as of date.
DEGREE (Degree)	Populated from the ACAD_DEGR record if the ACAD_PLAN for the ACAD_PROG being reported matches the ACAD_PLAN in the ACAD_DEGR_PLAN record.

Field	Logic
EXP_GRAD_TERM (Expected Graduation Term)	Populated from corresponding field on the ACAD_PROG record based on the student's primary academic program.
COMPLETION_TERM (Completion Term)	Populated from the corresponding field on the ACAD_PROG record based on the student's primary academic program. If the statistics type includes the academic program status <i>Completed</i>, the process selects those students who have a completion term that is greater than or equal to the consolidated statistics term (STRM), and those whose effective date of the student's completion row is greater than or equal to the term start date and less than or equal to the term end date.
DEGR_CONFER_DT (Confer Date)	Populated from the ACAD_DEGR record if the ACAD_PLAN for the ACAD_PROG being reported matches the ACAD_PLAN in the ACAD_DEGR_PLAN record.
ENRL_STAT_CHG_DT (Enrollment Status Change Date)	Populated based on the program action on the ACAD_PROG record. If the program status is CM and the program action is COMP, the DEGR_CONFER_DT is reported. If the program status is CM and the program action is not COMP, the EFFDT of the ACAD_PROG record is reported. If the program status is active or waitlisted, and during the term a program or NSC reporting unit change has occurred, the date of the change is reported. Otherwise, no date is reported. If any other program status is reported, the EFFDT of the ACAD_PROG record is reported.
ACAD_PROG_MAIN (Academic Program)	Populated with the student's primary academic program (ACAD_PROG) within the student's primary academic career based on the STDNT_CAR_TERM record.
STDNT_CAR_NBR_MAIN (Student Career Number)	Populated with the student career number (STDNT_CAR_NBR) based on the student's primary academic career and primary academic program as found on the STDNT_CAR_TERM record.
ACAD_PLAN (Academic Plan)	Calculated from the corresponding field on the ACAD_PLAN record based on the student's calculated primary academic program.

Field	Logic
ACAD_SUB_PLAN (Academic Subplan)	Populated from the corresponding field on the ACAD_SUBPLAN record based on the student's primary academic program.
EXTRA_ACTIVITY (Extracurricular Activity)	Populated from the corresponding field on the EXTRACUR_ACTVTY record. Primacy is taken into consideration by joining PS_EXTR_ACTVTY_TBL on common keys.
SF_1098_GRAD_FLG (1098 Grad Flag)	Currently not in use, reported as N.
SF_1098_HLFTME_FLG (1098 Half Time Flag)	Currently not in use, reported as N.
CORRECTION_STATUS (Correction Status)	Currently not in use, reported as 1.
SF_CORRECTION_DTTM (Correction Date Time)	Currently not in use, reported as NULL.
SF_OVERRIDE_GRAD (Override Grad Flag)	Currently not in use, reported as N.
SF_OVERRIDE_HALF (Override Half Flag)	Currently not in use, reported as N.
SF_ORIGINAL_SENTDT (Original Sent Date)	Currently not in use, reported as NULL.
SF_ORIGINAL_PRT_DT (Original Print Date)	Currently not in use, reported as NULL.
ATHLETIC_AID (Athletic Aid)	Populated from FIN_AID_TYPE field found on the financial aid record ITEM_TYPE_FA. If the FIN_AID_TYPE value equals A (athletic), then the program sets the ATHLETIC_AID flag for consolidated statistics to Y (yes). You can override this value with the Athletic Aid check box in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component.

Field	Logic
PROG_STATUS (Program Status)	This is the student's status within her or his primary academic program.
MULTI_ACAD_CAREER (Multiple Academic Career)	The program logic sets this flag to Y (yes) if the program is consolidating multiple careers and programs for a student regardless of a student's enrollment status. You can override this value with the Multiple Academic Career check box in the Mass Consolidated Statistics component or on the Basic Data page in the Student Consolidated Stats component.
FA_UNIT_WARNING (Excluded FA eligible Term Warn)	SRPCCONS currently does not calculate the value for the FA_UNIT_WARNING flag. The program logic sets this field value to N (no).
CAMPUS (Campus)	Populated from the corresponding field on the ACAD_PROG record based on the student's primary academic program.
LEVEL_LOAD_RULE (Level Load Rule)	The academic level and load rule that the SRPCCONS process uses to calculate the student's academic level and academic load.
OPRID (Operator ID)	Populated from the corresponding field on the run control table PS_RUN_CNTL_CONS, based on the user who saved the Consolidated Statistics process page.
LASTNAME_RPTD_NSLC (Last name Reported NSLC)	Populated from input through the Consolidated Statistics process page provided that a value was entered into the Prev Stat NSC (previous statistics NSC) field on the page. The program will use the EMPLID, INSTITUTION, and ACAD_STATS_PERIOD to pull up the STDNT_CONS_STAT record from the previous NSC run and pull the data from the record. STDNT_CONS_STAT record will have the Last Name field populated when SRNSLC.EX.SQR is run (<i>Manage Academic Records, Reports, NSC</i>).

<i>Field</i>	<i>Logic</i>
SSN_RPTD_NSLC (SSN Reported NSLC)	Populated from input through the Consolidated Statistics process page provided that a value was entered into the Prev Stat NSC field on the page. The program will use the EMPLID, INSTITUTION, and ACAD_STATS_PERIOD to pull up the STDNT_CONS_STAT record from the previous NSC run and pull the data from the record. STDNT_CONS_STAT record will have the SSN field populated when SRNSLC.EX.SQR is run (<i>Manage Academic Records, Reports, NSC</i>).
PREV_STATSPER_NSLC (Prev Acad Stats Period NSLC)	Originated from data on the Consolidated Statistics process page when the process is run.

Performing Academic Statistics Consolidation

This section discusses how to consolidate academic statistics.

Page Used to Perform Academic Statistics Consolidation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Consolidated Statistics	RUNCTL_CONS_STATS	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Process Consolidate Statistics, Consolidated Statistics	Consolidate students' academic statistics for an academic statistics period.

Consolidating Academic Statistics

Access the Consolidated Statistics page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Process Consolidate Statistics, Consolidated Statistics).

Consolidated Statistics

Run Control ID: 0550_ECON_142 [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PeopleSoft University

*Academic Statistics Period: 2002 Academic Year

Prev Stats NSC:

*Consolidation Mode: *Commit Frequency:

Student Career Term Snapshot Input Parameters						
*Academic Career		*Term		Snapshot Date	Overwrite	
1	GRAD	0460	2002 Sprng	02/15/2002	☐	
2	GRAD	0450	2001 Fall	09/15/2001	☐	
3	UGRD	0460	2002 Sprng	02/15/2002	☐	
4	UGRD	0450	2001 Fall	09/15/2001	☐	

Consolidated Statistics page

If the academic statistics period has *Consolidation Date* for its consolidation trigger, you must first run either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) for all academic career and term combinations defined within the academic statistics period. Then you must run the Consolidate Academic Statistics process (SRPCCONP). If the academic statistics period has *As of Date* or *As of Today* as its consolidation trigger, you need run only the Consolidate Academic Statistics process.

Academic Institution Select the academic institution that contains the academic statistics period for which you want to run the process.

Academic Statistics Period Select the academic statistics period for which you want to run the process.

Prev Stats NSC(previous statistics National Student Clearinghouse) Select the academic statistics period used as the source for the previous NSC Extract report that your institution submitted to the NSC within the current reporting period.

The Prev Stats NSC field enables your institution to report enrollment status changes to the NSC throughout a reporting period so that student loan lenders know when a student's enrollment status declines. The field enables the Consolidate Academic Statistics process to perform a comparison of a student's current enrollment status to that which was previously reported to the NSC within the same reporting period. The current report thus includes only the key differences between it and the previous report.

Use the Prev Stats NSC field *only if* you have previously reported to the NSC for the current reporting period or term. *Do not* use this field for a *first of term* submission to the NSC.

Consolidation Mode

Select the consolidation mode to indicate how the process that you are running writes its results to the applicable table. The Take Term Statistics Snapshot and the Recurring Term Snapshot processes write results to a temporary holding table (PS_STDNT_CARTRM_PD). Each student has only one row for an academic career, term, and snapshot date combination. The Consolidate Academic Statistics process writes results to the consolidated statistics table (PS_STDNT_CONS_STAT). Each student has only one row for each academic institution and academic statistics period combination. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. Select from the following choices.

Insert: Select this option to have the Take Term Statistics Snapshot process and the Recurring Term Snapshot process insert only new rows into the temporary holding table and leave untouched the rows in the table where students already have data for the academic career, term, and snapshot date combination. Or, select this option to have the Consolidate Academic Statistics process insert only new rows into the consolidated statistics table and leave untouched the rows in the table where students already have data for the academic institution and the academic statistics period combination specified for this run of the process.

Overwrite: Select this option to have the Take Term Statistics Snapshot process and the Recurring Term Snapshot process delete all existing rows from the temporary holding table where students already have data for the academic career, term, and snapshot date combination, *then* insert new rows into the table for students that have data for the academic career, term, and snapshot date combination. Or, select this option to have the Consolidate Academic Statistics process delete all existing rows from the consolidated statistics table where students already have data for the academic institution and academic statistics period combination specified on this page, *then* insert new rows into the table for students that have data for the academic institution and academic statistics period combination.

Commit Frequency

The system sets the commit frequency to 1. For other processes this is generally the best option. However, for these processes, you should set the commit frequency higher, such as 300, for faster processing of the job due to the potentially large volume of records.

Academic Career

The system displays a grid on the lower portion of the page only if the *academic statistics period* that you select has *Consolidation Date* as its consolidation trigger. To populate the temporary holding table when you run the Take Term Statistics Snapshot process and the Recurring Term Snapshot process, enter the academic career, term, and snapshot date combinations for which you want the process to create student records in the temporary holding table. The combinations must be valid ones that your institution has defined for this academic statistics period on the Academic Statistics Period page.

In this field, select the academic career for which you want the Take Term Statistics Snapshot process or the Recurring Term Snapshot process to create student records in the temporary holding table.

Term	Select the term within the academic career for which you want the Take Term Statistics Snapshot process or the Recurring Term Snapshot process to create student records in the temporary holding table.
Overwrite	Select to have the Take Term Statistics Snapshot process or the Recurring Term Snapshot process delete all existing rows from the temporary holding table (STDNT_CARTRM_PD), where students already have data for the academic career, term, and snapshot date combination, <i>then</i> insert new rows into the table for students that have data for the academic career, term, and snapshot date combination. Selecting this check box enables you to rerun the Take Term Statistics Snapshot process without retaining the values in the temporary holding table that were generated from a previous run of the process. If you set the Consolidation Mode field for the academic statistics period to <i>Insert</i>, then select the Overwrite check box for an individual row, the process deletes and replaces data records in the temporary holding table that match the academic institution, academic statistics period, academic career, and term for that individual row.

Viewing Consolidated Academic Statistics for Individual Students

This section discusses how to use the Student Consolidated Stats component to view the results of the Consolidate Academic Statistics process (SRPCCONP) on a student-by-student basis for a specific academic statistics period. For example, perhaps a student has just enrolled in another class and you want to adjust this student's statistics to more accurately report them. The component divides the results into the following four categories:

- Basic data.
- Statistics.
- Withdrawal and external study information.
- Demographic data.

See Also

Chapter 46, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 1162

Pages Used to View Consolidated Academic Statistics for Individual Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Consolidated Stats - Basic Data (student consolidated statistics - basic data)	STDNT_CONS_STATS0	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Basic Data	View basic data about a student's consolidated academic statistics for an academic statistics period, such as the student's primary academic career, term, primary academic program, academic level and load determination, and academic program status. Also use this page to view the calculated results of the Consolidate Academic Statistics process (SRPCCONP) for the student's academic load, academic level, units, form of study, and GPA. If necessary, override the calculated results.
Student Consolidated Stats - Statistics (student consolidated statistics - statistics)	STDNT_CONS_STATS1	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Statistics	View a student's consolidated term statistics and cumulative statistics for an academic statistics period.
Withdrawal/External Study	STDNT_CONS_STATS3	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Withdrawal/External Study	View withdrawals and cancellations on a student-by-student basis for an academic statistics period. Also use this page to view consolidated external study programs that apply towards a student's academic career, such as study abroad.
Demographics/Last Action	STDNT_CONS_STATS6	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Demographics/Last Action	View a student's age category, ethnic group, primary cohort, and latest consolidation status for the academic statistics period.

Viewing Basic Data

Access the Student Consolidated Stats - Basic Data page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Basic Data).

Basic Data

Statistics

Withdrawal/External Study

Demographics/Last Action

Paul Baines

FA0018

Find | View All

First

1 of 1

Last

*Academic Institution:	PSUNV	PeopleSoft University	Calculate
Academic Statistics Period:	AST1	1998 Fall Stat Period	
Academic Career:	UGRD	Undergraduate	
Term:	0330	1998 Fall	Semester
Academic Program:	LAU	Liberal Arts Undergraduate	
Academic Plan:	PHIL-BA	Philosophy (BA)	
Academic Sub-Plan:			
Level Determination:	Units	Academic Year:	1998
Load Determination:	Units	Billing Career:	UGRD
Academic Program Status:	Active in Program		
Prev Stats NSC:			

Student Consolidated Stats - Basic Data page (1 of 2)

Calculated Values and Overrides

Override		Calculated
☐	Academic Load:	Full-Time
	NSC Academic Load:	Full-Time
☐	Academic Level:	Freshman
	IPEDS Academic Level:	1st Fresh
☐	Units Taken for Progress:	12.000
☐	Total Cumulative Units:	0.000
☐	*Form of Study:	Enrollment
☐	Current GPA:	0.000
☐	Cumulative GPA:	0.000

Student Consolidated Stats - Basic Data page (2 of 2)

- Academic Institution

Select the academic institution that contains the consolidated academic statistics of the student.
- Academic Statistics Period

The page displays the student's consolidated academic statistics for each applicable academic statistics period that you have run.

Calculated Values and Overrides

Click the arrow on the left of the Calculated Values and Overrides group box title bar to display the calculated statistical results of the Consolidate Academic Statistics process (SRPCCONP) for various types of statistics. Select the Override check box next to each type of statistic to change the calculated results. The corresponding field becomes available. Enter the new value. The calculated results of the process itself always appear, unaltered on this page so that you can compare the original process calculation to your changes.

Calculate

If the academic statistics period for which you have calculated the student's consolidated academic statistics has *As of Date* or *As of Today* for its consolidation trigger, you can recalculate the student's consolidated statistics. Click this button to have the system rerun the Consolidate Academic Statistics process for this student's academic record in the academic institution and academic statistics period that you specify. If the academic statistics period has *Consolidate Date* for its consolidation trigger, then rerunning the Consolidate Academic Statistics process with the Calculate button has no bearing on the student's calculated results. This is because the process is retrieving statistics from the temporary holding table populated by either the Take Term Statistics Snapshot process (SRPCCONA) or the Recurring Term Snapshot process (SRPCCONU) rather than retrieving data from the student's records. The only way to recalculate a student's academic statistics in such a case is to first retake the term snapshots through the Term Statistics Snapshot process or the Recurring Term Snapshot process.

Viewing Statistics

Access the Student Consolidated Stats - Statistics page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Statistics).

Reset Cum Stats at Term Start (reset cumulative statistics at term start)

If this check box is selected, all statistics have been reset to zero at the start of the given term. If this check box is cleared, statistics have been accumulated from previous terms and added to the given term. This check box is set on the Cumulative Statistics page of the Term History component.

Viewing Withdrawal and External Study Information

Access the Withdrawal/External Study page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Withdrawal/External Study).

The system displays the student's withdrawal and external study statistics for an academic statistics period based on the student's primary academic career, primary academic program, and last term within the academic statistics period.

Viewing Demographic Data

Access the Demographics/Last Action page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Student Consolidated Stats, Demographics/Last Action).

Viewing Consolidated Academic Statistics for Groups of Students

This section discusses how to view mass consolidated academic statistics.

See Also

Chapter 46, "Consolidating and Reporting Academic Statistics," Understanding Consolidate Academic Statistics Process Calculations, page 1162

Page Used to View Consolidated Academic Statistics for Groups of Students

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mass Consolidated Statistics	STDNT_CONS_MASS0	Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Mass Consolidated Statistics, Mass Consolidated Statistics	Search for and view groups of students and update their consolidated academic statistics.

Viewing Mass Consolidated Academic Statistics

Access the Mass Consolidated Statistics page (Records and Enrollment, Enrollment Reporting, Consolidated Statistics, Mass Consolidated Statistics, Mass Consolidated Statistics).

Mass Consolidated Statistics

Academic Institution:	PeopleSoft University	Search
Academic Statistics Period:	1998 Fall Stat Period	

ID:		*Withdrawal \ Cancel:	
Academic Career:		Academic Load:	
Academic Program:		NSC Academic Load:	
Form of Study:		Academic Level:	
Program Status:		IPEDS Academic Level:	

☐ **Multiple Academic Career**

☐ **Excluded Eligible Term Warn**

Academic Information	Overrides	Level of Study	Academic Load	Units and Grade Point Average	Degree Details

ID	Academic Career	Academic Program	Program Status
FA0018	Baines,Paul	UGRD	LAU

Mass Consolidated Statistics page

By searching for statistics on groups of students within an academic statistics period, you can easily override the results of the Consolidate Academic Statistics process for every student in the group. The system retrieves the consolidated academic statistics for the students that meet your selection criteria and displays these statistics in the grid in the lower portion of the component. For example, perhaps your institution had consolidated academic statistics yesterday for a particular academic statistics period but discovers today that a group of law students need to enroll in a new class. This changes their academic load. To correct the inconsistency in their academic statistics, you can use the Mass Consolidated Statistics component to override the academic load that the Consolidate Academic Statistics process calculated for the law students.

Searching for Statistics on Groups of Students

Select the search criteria to find and display consolidated academic statistics for a student or group of students within an academic statistics period.

Multiple Academic Career

Select to have the system retrieve only those students who have multiple academic careers and also meet your search criteria.

Excluded Eligible Term Warn

Select to have the system retrieve only those students who meet your search criteria and also have been excluded from financial aid eligibility due to an insufficient number of units.

Search

Click to have the system retrieve and display the results meeting your selection criteria. The system pulls the statistics from the consolidated statistics table (PS_STDNT_CONS_STAT) and displays the results in the grid in the lower portion of the component. Select the tabs to move from one set of statistics to the next.

Viewing Statistics for Groups of Students

The system retrieves the statistics that meet your criteria from the consolidated statistics table (PS_STDNT_CONS_STAT) and displays the search results in the grid in the lower portion of the component. The system displays each student's consolidated academic statistics on a separate row. Use the horizontal tabs to move from one set of statistics to the next.

To override a student's calculated results, select the Overrides tab, select the check boxes that pertain to the statistics to override, then move to the applicable tab to change the statistics to override. The system always displays the unaltered process results on the various tabs of this component so that you can compare the process calculation to your changes.

After you update the consolidated academic statistics, click the Save button and the system stores your changes. The changes also appear in the Student Consolidated Stats component.

Producing Veteran Reports

This section lists prerequisites and discusses how to run the Veterans Report process (SRVETRPT) to produce veteran reports.

Prerequisites

As prerequisites to producing veteran reports, you must do the following tasks:

- Indicate, on the Bio/Demo Data page, that a student receives veterans benefits.
- Define, on the Addresses page, an additional address type to use when reporting these benefits.
- Run the Consolidate Academic Statistics process (SRPCCONP), which consolidates a student's academic load, based on her or his primary academic career and academic program, then stores the student's academic load in the consolidated statistics table (PS_STDNT_CONS_STAT).

Page Used to Produce Veteran Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Veterans Report	RUNCTL_SRVETRPT	Records and Enrollment, Enrollment Reporting, Veterans Report, Veterans Report	Run the Veterans Report process to process veteran information and print a hard-copy report listing all students who receive veterans benefits.

Running the Veterans Report Process

Access the Veterans Report page (Records and Enrollment, Enrollment Reporting, Veterans Report, Veterans Report).

Veterans Report		
Run Control ID:	UENG_2006	
	Report Manager Process Monitor	Run
Report Details		
*As Of Date:	09/01/2006	
*Academic Institution:	PSUNV	PeopleSoft University
*Academic Statistics Period:	CONC2	
Term:	0565	2006 Summer
Session:		
Academic Program:		
Sort Order:	Name	

Veterans Report page

The report draws data from populated tables in PeopleSoft Campus Community and Student Records and includes the student's name, Social Security number, mailing address for the Veterans Administration check, date of birth, name of primary degree program, academic credit (current units in progress), academic load, and tuition. When you create a veterans report, the system uses the academic load in the consolidated statistics table for the report.

First run the SRVETRPT SQR report; then run the SR779--- Crystal report. The SQR report gathers the data and stores it in a list file. Crystal formats this data for output.

As of Date	Enter the date through which the veterans benefits data is valid. This date appears on the Veterans report.
Academic Institution	Select the academic institution for which you are producing the report.
Academic Statistics Period	Select the academic statistics period for which you are producing the report.
Term	(Optional) Select the term that your institution is reporting to the Veterans Administration.
Session	(Optional) Select the session that your institution is reporting to the Veterans Administration. Values for this field are delivered with your system as translate values. You can modify these values.
Academic Program	(Optional) Select an academic program.
Sort Order	The system sets the sort order for the report to <i>Name</i> and sorts the names alphabetically. You can sort by academic program or Social Security number.

Producing NSC Extracts

This section discusses how to run the NSC Report process (SRNSLC.EX.SQR) to produce an NSC extract.

Page Used to Produce an NSC Extract

Page Name	Definition Name	Navigation	Usage
NSC Report National Student Clearinghouse report)	RUNCTL_SRNSLC	Records and Enrollment, Enrollment Reporting, NSC Report, NSC Report	Run the NSC Report process to generate a flat file extract of students enrolled during a specific period of time that you can then send electronically to the NSC.

Running the NSC Report Process

Access the NSC Report page (Records and Enrollment, Enrollment Reporting, NSC Report, NSC Report).

NSC Report

Run Control ID: PS

Report Manager

Process Monitor

Run

*Academic Institution:

PSUNV

PeopleSoft University

*Academic Statistics Period:

CONC1

2000 Contiguous

☒ Use Graduate Level Indicator

SSN Exclusions:

000

999

888

*Branch Code:

00

*Report Type:

Standard Report

*Address Usage:

SLCT ORD 1

Home, Mailing, Permanent, Work

*FICE Code:

1

*Output File:

C:\temp\NSC.dat

NSC Report page

The NSC Extract report lists all students (except international students) who have been enrolled at your academic institution during an academic statistics period, regardless of if they receive loans or if they have withdrawn. The NSC Extract process compiles the students' enrollment statuses based on the statistics that the system saves in the consolidated statistics table (PS_STDNT_CONS_STAT) when you run the Consolidate Academic Statistics process.

If a student has been withdrawn from an academic career (through the Term History - Withdrawal page), the system sets the WITHDRAWAL_CODE field on the student's career term record (STDNT_CAR_TERM) to WDR. Because the consolidated statistics processes gather students' career term data, the processes are able to include this withdrawal information in the consolidated statistics table. The NSC Extract process is thus able to include the academic career data for these withdrawn students in the extract. The NSC Extract process uses the status date of the withdrawal from the Last Date of Attendance field on the Term History - Withdrawal page.

In addition to the extract, the NSC Extract process sends a report directly to your printer. This report lists all students within a specified academic institution and academic statistics period that must be reported to the NSC. The report includes a header record identifying the institution (Federal Interagency Committee on Education code and branch code), date of file, term of reporting, and whether the report is standard, nonstandard, or graduate only; a detail record with the each student's Social Security number, first and last name, enrollment status (full-time, part-time, half-time, withdrawal, graduated, or deceased), and the corresponding status date, address, date of birth, term, term begin and end dates, and graduate level indicator (either yes or no); plus a trailer record containing counts of students in the extract. The trailer record includes the total number of student records in the extract file, a list of the students not included in the extract file, and messages stating why the process has not included these students (such as missing addresses, blank or invalid Social Security numbers, and invalid enrollment status). You can then fix the errors at the source.

Run the NSC Report process (SRNSLCEX.SQR) on a timeline that your institution determines in agreement with NSC.

Academic Institution	Select the academic institution for which you are producing the report.
Academic Statistics Period	Select the academic statistics period for which you are producing the report.
Use Graduate Level Indicator	If your institution participates in the NSC tax reporting service, select this check box to have the NSC Report process include a graduate level indicator in the NSC extract file. The report process looks in the ACAD_CAR_TBL record for the graduate level indicator for the student's primary academic career. Set the graduate level indicator on the Academic Career Table 2 page. If your institution has flagged the student's primary academic career as graduate level, the report process sets the graduate level indicator flag on the extract file to Y. Otherwise, the report process sets the graduate level indicator flag on the extract file to N. Institutions not participating in the NSC tax reporting service should clear this check box. Note. If this check box remains cleared on this page, the NSC Report process <i>does not</i> write a graduate level indicator to the extract, regardless of whether your institution has set graduate level indicators on the Academic Career Table 2 page.

SSN Exclusions (social security number exclusions)	Use these fields to exclude school-generated Social Security numbers and identification numbers from the NSC Extract report, as required by the NSC. Enter into each field the first three digits of the series you want to exclude, such as the 000 series and the 999 series. The NSC Extract process excludes all Social Security numbers within the series. You can list anywhere from zero to five series.
Branch Code	Select the branch code for the NSC extract.
Report Type	Select from the following choices the report type for the NSC extract. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. <i>Graduates Only:</i> The process includes only graduated students. <i>Non-Standard Report:</i> The process includes only academic sessions not considered <i>regular</i> academic sessions, such as summer session. <i>Standard Report:</i> The process includes only <i>regular</i> academic sessions.
Address Usage	Select the address usage that the NSC Extract process should follow. Address usage is how the process locates the address of students included in the extract.
FICE Code (Federal Interagency Committee on Education code)	Enter the FICE code to appear in the NSC extract for this academic institution. This value appears by default from the Academic Institution 3 page.
Output File	In addition to sending report output for this process to a file (through setting preferences in the Process Monitor), you can also send any additional output files created by this process to a file directory. To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read and write permission. If you cannot locate such a folder, consult your system administrator.

Chapter 47

Viewing Student Records Process Messages

This chapter discusses how to view system messages for certain Student Records COBOL processes.

Viewing System Messages for Student Records COBOL Processes

You can view system messages for certain COBOL processes within Student Records that are specifically coded to use this message log. These processes log all messages to the student records message log table whenever you run them. The messages include successful completions of the process and errors that the process encounters. When you run one of these processes, the system displays a message indicating that you can view messages for the process on the Message Log page. Depending on the commit frequency of the process, you can usually view messages in this catalog only after the process finishes.

This section discusses how to view system messages.

Page Used to View System Messages for Student Records COBOL Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Message Log	MESSAGE_LOG_SR	Curriculum Management, Schedule of Classes, Review Message Log, Message Log	View system messages.

Viewing System Messages

Access the Message Log page (Curriculum Management, Schedule of Classes, Review Message Log, Message Log).

Process Instance

A number that uniquely identifies each process request and its position in the queue. The system automatically increments and assigns a process instance value to each process request.

Job ID	Multiple process definitions can be logically linked to a job request to process each request serially or in parallel, and optionally to initiate subsequent processes based on the return code from each prior request. If applicable, the system displays the identification code for the PSJob.
Program Name	If applicable, the system displays the name of the program within the PSJob to which the messages relate.
Message Sequence	Each individual message has a sequence in relation to the others, revealing the order in which the process wrote the messages to the log.
Severity	The system displays the severity of the message, such as <i>Error</i> .
Last Update Date Time	The date and time that the system last updated the message appears here.
Message Text	Information about the process status appears here. Typically, this field displays messages that describe the status of the program that you are running.
Explanation	A more detailed explanation of the message text appears here.

Chapter 48

(AUS) Managing Enrollment Feedback

This chapter provides an overview of the Enrollment Feedback process and discusses how to:

- Process enrollment feedback for Queensland Tertiary Admissions Centre (QTAC).
- Process enrollment feedback for South Australian Tertiary Admissions Centre (SATAC).
- Process enrollment feedback for University Admissions Centre (UAC).
- Process enrollment feedback for Victorian Tertiary Admissions Centre (VTAC).

Understanding Enrollment Feedback

Each state in Australia has access to a Tertiary Admissions Centre (TAC) that makes offers of admission on behalf of participating institutions. After TAC makes the offers, each institution becomes responsible for recording all acceptances of offers and all subsequent enrollments.

The four TACs in Australia that make offers are the University Admissions Centre-NSW & ACT (UAC), South Australian Tertiary Admissions Centre (SATAC), Victorian Tertiary Admissions Centre (VTAC), and Queensland Tertiary Admissions Centre (QTAC).

The final phase of the main TAC admissions period is known generically as enrollment feedback and involves the return of statistical information about applicants to the relevant TAC. In this phase, it is verified whether or not those applicants who accepted offers are in fact enrolled at the institution as of the census date of 31 March.

The principal purpose of the Enrollment Feedback file is to collect enrollment information about applicants who have been made an offer of admission through a TAC. The information is used by the TACs, participating institutions, Department of Education Science and Training (DEST), New South Wales Vice Chancellors Committee (NSWVCC), Australian Vice Chancellors Committee (AVCC), and other organizations for statistical purposes and future TAC application processing.

Each TAC has an enrollment feedback file that differs in format and field type; however, three of the TACs just require a file to be created in their own specified format. These files all get processed through different software. The other TAC (QTAC) delivers two files that must have fields appended.

Note. Only students loaded into your system using the TAC Load process (SAD_TACLDANZ) appear on the Enrollment Feedback reports.

Common Elements Used in This Chapter

Admit Term	Enter the admit term for which you are reporting your students. The process captures and reports on any student loaded through the TAC Load process whose admit term matches the term you specify.
File Output	Enter the directory location and name for the enrollment feedback output files. The system displays one or more file output fields based on the TAC that you process.
Input File Path	For QTAC and VTAC, enter the file name and directory location where your institution has put the files received from the TAC. The file name is determined as delivered by the TAC.
Institution	Enter the academic institution for which you want to generate an enrollment feedback report.
Run Date	Enter the date you want to use for the run date on the enrollment feedback report. The run date is usually 31 March each year. The system populates this field with today's date by default.

Processing Enrollment Feedback for QTAC

This section provides an overview of QTAC enrollment feedback processing and discusses how to report enrollment for QTAC.

Understanding QTAC Enrollment Feedback Processing

The final phase of the main QTAC admissions period involves a verification of whether applicants who accepted offers are in fact enrolled as of the census date of 31 March.

Two files are placed in the institution's account on the QTAC FTP server. The account name is identical to that used for the offer files.

As of 31 March, the following information is returned to QTAC:

- Names of individuals who are enrolled or not enrolled.
- Names of individuals who are enrolled in the same QTAC programs or a different QTAC program.
- Names of individuals who are now deferred.
- Names of individuals who are not on the acceptance list.

These individuals have lapsed offers that have been reinstated by the institution.

- Mode of attendance of each enrolled student.

- Type of attendance of each enrolled student.
- Student identification number of each enrolled student.

The institution may report this information to QTAC in one of two ways—as a bulk update or through the online system.

Reviewing Data Mapping for the QTAC Output File

This table lists the data mapping for the QTAC Enrollment Feedback files:

<i>QTAC Field</i>	<i>PeopleSoft Field</i>
QTAC Reference Number	ADM_APPL_DATA.Ext_adm_appl_nbr
Family_Name	NAMES.LAST_NAME
Given_Name_1	NAMES.FIRST_NAME
Given_Name_2	NAMES.MIDDLE_NAME
Date_of_Birth	PERSONAL_DATA.BIRTHDATE
Course_Code	ACAD_PROG_TBL.Program_cd
Final_Response	A,D,I,K
Final_Enrolment_Status	Y,N,Z
Inst_Student_Num	ADM_APPL_DATA.Emplid
Attendance Type	F,P, or blk
Attendance Mode	I,E,M or blk

Page Used to Create a QTAC Enrollment Feedback Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Feedback QTAC	SSR_RUN_QTACENRLFD	Records and Enrollment, Enrollment Reporting, Enrollment Feedback QTAC AUS, Enrollment Feedback QTAC	Generate enrollment feedback reports for QTAC.

Reporting Enrollment for QTAC

Access the Enrollment Feedback QTAC page (Records and Enrollment, Enrollment Reporting, Enrollment Feedback QTAC AUS, Enrollment Feedback QTAC).

Enrollment Feedback QTAC

Run Control ID: AUS [Report Manager](#) [Process Monitor](#) Run

Parameters

*Institution: PeopleSoft Australia Uni

*Admit Term: 2006 Fall

Run Date:

Input File Path1:

Input File Path2:

File Output:

Enrollment Feedback QTAC page

Processing Enrollment Feedback for SATAC

This section provides an overview of SATAC enrollment feedback processing and discusses how to report enrollment for SATAC.

Understanding SATAC Enrollment Feedback Processing

Your reconciliation should ensure that the enrollment record and the SATAC acceptance record (response codes A & AB) are identical for all students new to each of your programs offered through SATAC.

The basic codes are shown in the following table:

<i>SATAC Response Code</i>	<i>Definition</i>
A or AB	Enrolled
F or FB	Deferred
K or KB	Withdrawn

The four distinct phases of the reconciliation process are:

1. SATAC data extract.

SATAC extracts the most up-to-date applicant information from its database and forwards it to its member institutions around the 31 March census date. Offer data can be then used by the member institution to add or update its information about SATAC applicants.

2. Reconciliation file prepared by institution.

Each member institution extracts information from its own enrollment records and creates a file of reconciliation data to return to SATAC. This file should contain data about all new course students whose application should be processed by SATAC.

3. SATAC edit, edit correction, and update process.

SATAC processes the reconciliation file returned from the member institutions in an iterative process. The process begins by running the edit program and reporting any validation errors in the data, then analyzing and correcting those errors (if possible). The next step is rerunning the edit program, reporting any errors, analyzing and correcting errors until all differences in the SATAC database and institutional files can be reconciled, and updating the SATAC database with the correct institutional data.

4. Reconciliation reporting.

Reports that summarize the results are prepared by SATAC for the member institutions. Any issues that need addressing are highlighted.

Reviewing Data Mapping for the SATAC Output File

The following table lists the data mapping for the SATAC Enrollment Feedback files:

<i>SATAC Field</i>	<i>PeopleSoft Field</i>
INST_Ref_Num	ADM_APPL_DATA.Ext_adm_appl_nbr
INST_Family_Name	NAMES.LAST_NAME
INST_Given_Name_1	NAMES.FIRST_NAME
INST_Given_Name_2	NAMES.MIDDLE_NAME
INST_Student_Number	ADM_APPL_DATA.Emplid
INST_Gender	PERSONAL_DATA.SEX
INST_Date_of_Birth	PERSONAL_DATA.BIRTHDATE
INST_Offer_Course_Code	ACAD_PROG_TBL.Program_cd
INST_Enrolment_Status	'A','F','K'
Filler	spaces

Page Used to Produce a SATAC Enrollment Feedback Report

Page Name	Definition Name	Navigation	Usage
Enrollment Feedback SATAC	SSR_RUN_ENROLFEED	Records and Enrollment, Enrollment Reporting, Enrollment Feedback SATAC AUS, Enrollment Feedback SATAC	Generate enrollment feedback reports for SATAC.

Reporting Enrollment for SATAC

Access the Enrollment Feedback SATAC page (Records and Enrollment, Enrollment Reporting, Enrollment Feedback SATAC AUS, Enrollment Feedback SATAC).

Enrollment Feedback SATAC

Run Control ID: 1162497115 [Report Manager](#) [Process Monitor](#) Run

Parameters

***Institution:**  PeopleSoft Australia Uni

***Admit Term:**  2007 Fall

Run Date: 

File Output:

Enrollment Feedback SATAC page

Processing Enrollment Feedback for UAC

This section provides an overview of UAC enrollment feedback processing and discusses how to report enrollment for UAC.

Understanding UAC Enrollment Feedback Processing

During UAC enrollment feedback processing, the system produces a data set for each offer extended through UAC. Each data set contains the following:

- Enrollment code.
- Student number.

- Attendance type.
- Attendance mode.

Each institution has its own connection to the UAC system and generates its own data set. This data set can be updated in two ways, either through a file upload or manual update. This data set contains all offers for a given institution and also provides several empty columns as placeholders to receive information supplied by the institution.

Reviewing Data Mapping for the UAC Output File

The following table lists the data mapping for the UAC Enrollment Feedback files. The file created is a comma delimited file. Numeric fields should be zero justified.

UAC Field	PeopleSoft Field
UAC Reference Number	ADM_APPL_DATA.Ext_adm_appl_nbr
UAC Course	ACAD_PROG_TBL.Program_cd
Emplid	ADM_APPL_DATA.Emplid
Enrolment	E,D,N
Attendance Type	F,P, or blk
Attendance Mode	I,E,M or blk

Page Used to Create a UAC Enrollment Feedback Report

Page Name	Definition Name	Navigation	Usage
Enrollment Feedback UAC	SSR_RUN_ENROLFEED	Records and Enrollment, Enrollment Reporting, Enrollment Feedback UAC AUS, Enrollment Feedback UAC	Generate enrollment feedback reports for UAC.

Reporting Enrollment for UAC

Access the Enrollment Feedback UAC page (Records and Enrollment, Enrollment Reporting, Enrollment Feedback UAC AUS, Enrollment Feedback UAC).

Enrollment Feedback UAC

Run Control ID: 1162497115

[Report Manager](#)
[Process Monitor](#)
[Run](#)

Parameters

***Institution:** PeopleSoft Australia Uni

***Admit Term:** 2007 Fall

Run Date:

File Output:

Enrollment Feedback UAC page

Processing Enrollment Feedback for VTAC

This section provides an overview of VTAC enrollment feedback processing and discusses how to report enrollment for VTAC.

Understanding VTAC Enrollment Feedback Processing

Enrollment feedback is also generated for the Victorian Tertiary Admissions Centre (VTAC).

Reviewing Data Mapping for the VTAC Output File

This table lists the data mapping for the VTAC Enrollment Feedback files:

<i>VTAC Field</i>	<i>PeopleSoft Field</i>
VTAC Application number	ADM_APPL_DATA.Ext_adm_appl_nbr
Surname	NAMES.LAST_NAME
First Given Name	NAMES.FIRST_NAME
Second Given Name	NAMES.MIDDLE_NAME
Category	TAC_SPS_VIC_ANZ.VIC_CATEGORY
Offered Course	ACAD_PROG_TBL.PROGRAM_CD
Street Name	ADDRESSES.ADDRESS1

VTAC Field	PeopleSoft Field
Suburb	ADDRESSES.CITY
State	ADDRESSES.STATE
Postcode	ADDRESSES.POSTAL
Country	ADDRESSES.COUNTRY
Overseas Zip/Postcode	TAC_SPS_ANZ.OVERSEAS_ZIP
Enrolment Indicator	Derived from PS_ADM_APPL_PROG.PROG_ACTION or PS_ACAD_PROG.PROG_ACTION depending if the student has been matriculated
Round number	TAC_SPS_ANZ.OFFER_ROUND_NUM
Acceptance Indicator	Provided by VTAC
Date of Birth	PERSONAL_DATA.BIRTHDATE

Page Used to Create a VTAC Enrollment Feedback Report

Page Name	Definition Name	Navigation	Usage
Enrollment Feedback VTAC	SSR_RUN_VTACENRLFD	Records and Enrollment, Enrollment Reporting, Enrollment Feedback VTAC AUS, Enrollment Feedback VTAC	Generate enrollment feedback reports for VTAC.

Reporting Enrollment for VTAC

Access the Enrollment Feedback VTAC page (Records and Enrollment, Enrollment Reporting, Enrollment Feedback VTAC AUS, Enrollment Feedback VTAC).

Enrollment Feedback VTAC

Run Control ID: AUS

[Report Manager](#) [Process Monitor](#) Run

Parameters

***Institution:**

PSAUS

PeopleSoft Australia Uni

***Admit Term:**

0570

2006 Fall

Run Date:

31/03/2007

Input File Path1:

c:\temp\name given by VTAC for file 1

File Output:

c:\temp\vtacfall2006.lis

Enrollment Feedback VTAC page

1206

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Chapter 49

(AUS) Managing the Automated Results Transfer System

This chapter provides overviews of the Automated Results Transfer System (ARTS) and ARTS file naming conventions and discusses how to:

- Prepare for ARTS processing.
- Perform ARTS processing.

Understanding ARTS

ARTS is a national system that electronically distributes academic record information for current and former students who have applied for admission to an institution through a Tertiary Admissions Centre (TAC). The ARTS system enables the TAC to obtain academic records quickly and securely, in order to support the applications for students applying to programs of study at other institutions.

The ARTS process is initiated by the target institution's TAC, which sends a request for academic information to the target institution. The institution acknowledges the TAC request through an acknowledgment file and creates a result file with the student's academic record information. The institution then sends the result file to the TAC. When the TAC receives the results file, they send an acknowledgment file to the institution. The request file, the result file, and the acknowledgment file, are all transferred electronically between the TAC and the institution. The details of how this works are:

1. A TAC initiates a request for academic record information about a current or past student of an institution by creating a request file containing identifying information supplied by the student.
2. The admissions center encrypts the request file using a standard encryption process.
3. The admissions center transfers the encrypted request file to a target directory on the institution's system.
4. The institution renames and copies the request file to a working directory, decrypts and validates the request, and places an encrypted request acknowledgment file on the target directory.
5. The institution retrieves the academic record information and constructs and encrypts a result file.
6. The institution copies the encrypted result file back to the target directory.
7. The admissions center continually checks the institution target directory to determine the state of requests.

The admissions center retrieves the result file and deletes the request and acknowledgment files from the target directory.

8. The admission center decrypts and validates the result file and places an encrypted result acknowledgment file on the target directory.

If the result file does not validate, the system places a copy of the original encrypted request file on the target directory.

9. The institution continually monitors the target directory for the existence of result acknowledgment files.
 - a. If no error records are reported, the acknowledgment file is deleted by the institution.
 - b. If error records are reported, the institution takes action to rectify the cause of the invalid data or result file format before deleting the acknowledgment file.

PeopleSoft Campus Solutions is designed to perform the following tasks for ARTS processing:

- Read all ARTS request files in a target directory, after the file is decrypted.
- Create acknowledgment files for each request file.
- Retrieve academic information for a student in a request file, including notes.
- Produce a result file for each individual request.

Note. The system does not process students who have their results blocked by user-defined service indicators.

Additional detail about specific requirements for ARTS processing, file formats, data reporting guidelines, and technical information for ARTS is available.

See Automated Results Transfer System Users Guide published by the Australasian Conference of Tertiary Admissions Centres.

Understanding ARTS File Naming Conventions

PeopleSoft Campus Solutions creates all acknowledgement and results files and names them in accordance with a specific file naming convention, which is also used by all TACs.

The naming convention for ARTS files is XAAAAAAA.YYY, where each of the alphanumeric characters is defined as:

X	The Admissions Centre code: • Q: Queensland Tertiary Admissions Centre. • S: South Australian Tertiary Admissions Centre. • T: Tertiary Institutions Service Centre (Western Australia). • U: Universities Admissions Centre (New South Wales). • V: Victorian Tertiary Admissions Centre.
AAAAAAA	A unique seven digit alphanumeric code identifying either the applicant or the transaction.

YYY

The file extension that identifies the type of the file:

- *REQ*: Request file.
- *ACK*: Request Acknowledgment file.
- *RLT*: Result file.
- *ACS*: Result Acknowledgment file.
- *CPD*: Request file after processing.

Note. The file name must be in upper case and contain no special (nonalphanumeric) characters.

File Naming Examples

For example, a request file generated by South Australia TAC for applicant 12BC567 would be named S12BC567.REQ.

The request acknowledgment file generated by the PeopleSoft system corresponding to the request file would be named S12BC567.ACK.

The result file generated by the PeopleSoft system corresponding to the request file would be named S12BC567.RLT.

The acknowledgment file generated by South Australia TAC for applicant 12BC567 corresponding to the request file would be named S12BC567.ACS.

Preparing for ARTS Processing

To prepare for ARTS processing, use these components: Academic Program Table (ACADEMIC_PROG_TBL), ARTS Institution Mapping AUS (SSR_ARTS_INST_MAP), Service Indicator Data (SERVICE_IND_PERS), ARTS Student Program Notes AUS (SSR_PROG_NOTES), Honors and Awards (HNR_AWD_EXT_PERS), Person Comment Entry (CMNT_ENTRY), and Communication Management (COMM_MANAGEMENT).

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

- Enter field of study values.
- Enter data mapping specifications.
- Assign service indicators.
- Enter student program notes.
- Enter honors and awards.
- Enter comments.
- Enter communications.

Understanding ARTS Processing

To prepare for ARTS processing, ensure that:

- Fields of study have been populated on the Acad Prog AUS (Academic Program AUS) page.
- Data mapping specifications have been completed on the ARTS Institution Mapping page.
- Service indicators are assigned to students that you want the system to exclude from ARTS processing on the Service Indicator Data page.

In addition to reporting traditional personal data and course data that resides in your system for students, the ARTS process can also report:

- Honors and awards information.
- Program notes.
- Comments.
- Communications.

Therefore, prior to running the ARTS process, add:

- Program notes to student records.
- Honors and awards information to student records.
- Comments to student records.
- Communications to student records.

Pages Used to Prepare for ARTS Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Acad Prog AUS (academic program Australia)	SSR_ACAD_PROG_AUS	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS	Assign a field of study value for each program that can be processed by ARTS.
ARTS Institution Mapping	SSR_ARTS_INST_MAP	Set Up SACR, Product Related, Student Records, Transcript, ARTS Institution Mapping AUS, ARTS Institution Mapping	Map PeopleSoft campus codes to the Commonwealth Department of Education, Science and Training (DEST) institution codes, which the system uses in the ARTS transcripts.

Page Name	Definition Name	Navigation	Usage
Manage Service Indicators	SRVC_IND_SUMRY	Campus Community, Service Indicators (Student), Manage Service Indicators, Manage Service Indicators	Assign or release a service indicator. Students with service indicators that match one or both of the service indicators entered on the Arts Parameters 1 page at runtime will be excluded from ARTS processing.
ARTS Student Program Notes	SSR_PROG_NOTES	Records and Enrollment, Transcripts, ARTS Student Program Notes AUS, ARTS Student Program Notes	Add notes to a student's program in order for notes to appear on the ARTS transcript.
Honors and Awards	HONORS_AWARDS_CS	Records and Enrollment, Graduation, Honors and Awards, Honors and Awards	Track student honors and awards. The Honors/Awards process populates the page according to the rules you set on the Honors/Awards Rule page. You can also manually enter information on this page.
Person Comment Entry	CMNT_ENTRY1	Campus Community, Comments, Comments - Person, Person Comment Entry, Person Comment Entry	Enter comments about an individual.
Person Communication	COMM_MGMT1	Campus Community, Communications, Person Communications, Communication Management, Person Communication	Assign a communication to an individual.

Entering Field of Study Values

Access the Acad Prog AUS page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS).

Enrollment	Course	Dynamic Date	Acad Prog AUS	Acad Prog NZL	Home Campus NLD
Academic Institution: PSUNV PeopleSoft University					
Academic Program: LAU Liberal Arts Undergraduate					
Find View All First 1 of 1 Last					
Effective Date:	01/01/1900		Status:	Active	
*Field of Study:	030101		Arts, Humanities, Social Sc.		
Field of Education Code:	091523		Literature		
Program Type Code:	10		Bachelor's Pass		
Special Program Type:	00		Not Course of Special Interest		
Aggregated EFTSL:	30		3 Years		
Minimum Units:	360.00				
Program Eligibility:	PELS Elig				
CRICOS Code:					
☒ Combined Course Indicator					
Supplementary FOS:	000000		Non-Award		
Supplementary FOE:	010101		Mathematics		
DEST Related Programs Customize Find First 1 of 1 Last					
	Related Academic Program		*Status		
1			Active	+	-

Acad Prog AUS page (1 of 2)

TAC Program Mapping		Find View All First 1 of 1 Last
Program Code:		+ -
TAC Stream Code:		
Academic Load:		
Academic Plan:		
Mode of Attendance:		
Campus:		

Acad Prog AUS page (2 of 2)

Enter a field of study value for each program that you process as part of ARTS.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans," Defining Academic Programs

Entering Data Mapping Specifications

Access the ARTS Institution Mapping page (Set Up SACR, Product Related, Student Records, Transcript, ARTS Institution Mapping AUS, ARTS Institution Mapping).

ARTS Institution Mapping

Academic Institution: PSAUS PeopleSoft Australia Uni

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1900

Customize | Find

First 1 of 1 Last

*Campus	Code	Description	Version ID	Main	IP Address
MAIN	9998	Peoplesoft Aus University	2.7	☒	

ARTS Institution Mapping page

- Version ID

Enter the Version ID. The ARTS version number represents the specification number applicable to the request/return. The system includes this number on the Request file header record, Result file header record, Request acknowledgement file header record and Result acknowledgement file header record.

Except for a short period of time during change over from one version to the next, this number will be the same for all request/results records—the current version. However during changeover periods and for testing, multiple versions may coexist for short periods.
- Main

Select this check box to indicate the main campus for the institution.
- IP Address

An IP address can be assigned to the campus for which you select the Main check box. The system includes this on the ARTS transcript header record.

Assigning Service Indicators

Access the Manage Service Indicators page (Campus Community, Service Indicators (Student), Manage Service Indicators, Manage Service Indicators).

Manage Service Indicators

Kimberly Adams
AA0001

Display: Effect All Institution PeopleSoft University [Refresh](#)

[+ Add Service Indicator](#)

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
HON	Honor's Student	Honor Student	PSUNV	0000	Begin Term			01/01/2000	

[+ Add Service Indicator](#)

Manage Service Indicators page

Assign service indicators to students that you want to exclude from ARTS processing. At runtime, you can specify up to two (2) service indicators which, if assigned to a student, will exclude the student from ARTS processing.

See [Chapter 49, "\(AUS\) Managing the Automated Results Transfer System," Performing ARTS Processing, page 1216.](#)

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Service Indicators," Viewing, Assigning, or Removing Service Indicators

Entering Student Program Notes

Access the ARTS Student Program Notes page (Records and Enrollment, Transcripts, ARTS Student Program Notes AUS, ARTS Student Program Notes).

ARTS Student Program Notes

Scott Carter
AA0004

Find | View All
First 1 of 1 Last

Academic Career: UGRD Undergraduate

Student Career Nbr: 0

Academic Program: LAU Liberal Arts Undergraduate

Institution: PSUNV PeopleSoft University

Find | View All
First 1 of 1 Last

*Sequence Nbr: 1

☐ Include Program Description

ARTS Program Notes:

ARTS Student Program Notes page

Enter any notes that you want to include in the ARTS process.

Sequence Nbr (sequence number) If you have multiple notes per program, enter a sequence value to control the order of the notes.

Include Program Description Select to include the program description in the report.

ARTS Program Notes Enter notes for the student's program.

Entering Honors and Awards

Access the Honors and Awards page (Records and Enrollment, Graduation, Honors and Awards, Honors and Awards).

Enter any honors and awards information that you want to include in the ARTS process. You specify the honors and awards that you want to report during ARTS processing on the Honors/Awards page.

See [Chapter 49, "\(AUS\) Managing the Automated Results Transfer System," Entering ARTS Honors and Awards Parameters, page 1218.](#)

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Participation Data," Entering Honors and Awards Data

Entering Comments

Access the Person Comment Entry page (Campus Community, Comments, Comments - Person, Person Comment Entry, Person Comment Entry).

Enter any comments that you want to include in the ARTS process. You specify the comments that you want to report during ARTS processing on the Comments/Communications page.

See [Chapter 49, "\(AUS\) Managing the Automated Results Transfer System," Entering Comment and Communication Parameters, page 1219.](#)

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Comments," Entering Comments About an Individual

Entering Communications

Access the Communication Management 1 page (Campus Community, Communications, Person Communications, Communication Management, Person Communication).

Enter any communications that you want to include in the ARTS process. You specify the communications that you want to report during ARTS processing on the Comments/Communications page.

See [Chapter 49, "\(AUS\) Managing the Automated Results Transfer System," Entering Comment and Communication Parameters, page 1219.](#)

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Communications," Assigning Communications

Performing ARTS Processing

You can schedule ARTS processing to run routinely using the Process Scheduler. After you set up the process pages in this section and specify a processing frequency, you need only monitor the system.

The processing program operates under the assumption that the request files have been decrypted and placed into the appropriate directory, which the institution specifies in the Input File Path field.

This section discusses how to:

- Enter ARTS processing parameters.
- Enter ARTS honors and awards parameters.
- Enter comment and communication parameters.

Pages Used to Run the ARTS Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Arts Parameters 1	SSR_RUN_SRARTS	Records and Enrollment, Transcripts, ARTS Results AUS, Arts Parameters 1	Provide parameters for ARTS processing. Specify where the system shall retrieve and place the ARTS files, and indicate what service indicators (if present for a student) prevent a student's academic record from being released.
Honors/Awards	SSR_RUN_SRARTS2	Records and Enrollment, Transcripts, ARTS Results AUS, Honors/Awards	Enter the codes you have set up in your system for the various types of honors and awards that you want to report in the results file. Honors categories are used to determine the honors flag in the course attempt record. Careers are used to select honor details in the result file.
Comments/Communications	SSR_RUN_SRARTS3	Records and Enrollment, Transcripts, ARTS Results AUS, Comments/Communications	Enter the codes that you set up in your system for the various types of comments and communications that you want to report as notes in the result file.

Entering ARTS Processing Parameters

Access the ARTS Parameters 1 page (Records and Enrollment, Transcripts, ARTS Results AUS, Arts Parameters 1).

ARTS Parameters 1		Honors/Awards	Comments/Communications
Run Control ID: ABC		Report Manager	Process Monitor
Run			
Report Request Parameters			
*Input File Path:	c:\templarts-in		
Output File Path:	c:\templarts-out		
*Academic Institution:	PSUNV		PeopleSoft University
Service Indicator - Fees:	ALL		All Services Hold
Servc Indicator Reason - Fees:	ALL		All Services Hold
Service Indicator - Other:	L01		Library Fines
Servc Indicator Reason - Other:	LF001		Overdue Library Fines

ARTS Parameters 1 page

Input File Path	Enter the complete file path to the ARTS request files.
Output File Path	Enter the complete file path to where you want to post the ARTS results and request acknowledgment files.
Academic Institution	Enter the academic institution that you want to process. If you have more than one institution, you may need to set up multiple run control IDs.
Service Indicator - Fees and Service Indicator Reason - Fees	Select a service indicator code and reason in order to identify students whose academic records should not be released due to unpaid fees. You can leave these fields blank.
Service Indicator - Other and Service Indicator Reason - Other	Select a service indicator code and reason in order to identify students whose academic records should not be released due to other reasons. You can leave these fields blank.

Entering ARTS Honors and Awards Parameters

Access the Honors/Awards page (Records and Enrollment, Transcripts, ARTS Results AUS, Honors/Awards).

ARTS Parameters 1		Honors/Awards		Comments/Communications	
Run Control ID: ABC		Report Manager		Process Monitor Run	
Honors Award Categories					
Honors Category 1 (Lvl I):	DEANLS		Dean's List		
Honors Category 2 (Lvl IIA):	NHS		National Honors Society		
Honors Category 3 (Lvl II):					
Honors Category 4 (Lvl IIB):					
Honors Category 5 (Lvl III):					
Find First 1-2 of 2 Last					
Career:	MEDS		Medical School	+ -	
Career:	UGRD		Undergraduate	+ -	

Honors/Awards page

The Course Attempt record is written out in the ARTS Results File extract. The Result File Course Attempt record is a type of record in the output file. The Honours flag is a field in this record.

In the Honors Award Categories group box, select the honors categories that you want to include in students' academic records for ARTS. Any honors or awards in a student's record that have an honors category listed on this page will cause the Honours Flag field to be set in the Result Output File produced for the Course Attempt record. The input parameters include up to five honors code categories that may be used when building the Honours Flag field value in the Result File Course Attempt record. For example, if a student has *NHS* as an award code, then the system will code the Honours flag as 3, which specifies Lvl IIA.

Use the Career field to identify the careers to which honors details should be associated. Add rows to include additional careers.

The ARTS Honour Flag is described in the ARTS user guide.

See Automated Results Transfer System Users Guide published by the Australasian Conference of Tertiary Admissions Centres.

Entering Comment and Communication Parameters

Access the Comments/Communications page (Records and Enrollment, Transcripts, ARTS Results AUS, Comments/Communications).

ARTS Parameters 1		Honors/Awards		Comments/Communications	
Run Control ID: ABC		Report Manager		Process Monitor	
Run					
Comments/Notes Categories					
Comment Category 1:	ALEVNT		Alumni Events		
Comment Category 2:	AWRDGS		Awarding General Secured		
Comment Category 3:					
Comment Category 4:					
Comment Category 5:					
Communication/Notes Categories					
Communication Category 1:	ADMORG		Admissions Organization Comm		
Communication Category 2:	AWARD		Financial Aid Award Notificatn		
Communication Category 3:					
Communication Category 4:					
Communication Category 5:					

Comments/Communications page

In the Comments/Notes Categories group box, select the comment categories that you want to include in the student's academic records for ARTS. Any comment in a student's record that has a comment category listed on this page is included in the results file as part of the student note record. The input parameters include up to five categories of comments to look for when building the relevant student note records.

In the Communication/Notes Categories group box select the communication categories that you want to be included in student's academic records for ARTS. Any communication in the student's record that has a communication category listed on this panel is included on the Results files part of the student note record. The input parameters include up to five communication categories to look for when building the relevant student note records.

Click Run to run the ARTS (SRARTS) process. PeopleSoft Process Scheduler runs the ARTS process at user-defined intervals.

Note. You should schedule the ARTS process to run at intervals that enable the system to promptly respond to ARTS requests.

Chapter 50

(AUS) Generating Government Reports

This chapter provides an overview of the DEEWR file generation process and discusses how to:

- Record a Commonwealth Scholarship.
- Generate the Student Data files that allow revision.
- Process DEEWR revisions.
- Process the DEEWR Applications and Offers files.
- Generate Centrelink reports.

See Also

Chapter 16, "(AUS) Setting Up Government Reporting," page 369

Understanding the DEEWR File Generation Process

To understand the business process requirements to generate and submit the various DEEWR files, it is important to understand the relationships between processes and file output.

This section discusses:

- Student Data files with multiple reporting periods per year and revision requirements.
- Past Course Completions—annual reporting and revision requirements.
- Unit of Study Completions file—annual reporting.
- Course of Study file.

Student Data Files with Multiple Reporting Periods Per Year and Revision Requirements

Most files in the Student Data collection (EN, LL, DU, SS, OS) rely on a prerequisite work process to extract the data to be reported. This process populates work data records with the base data for reporting, and in the case of enrollment data, key information that is common to multiple file extracts. Each of these data tables contains a submission date field. The processes to generate the flat file extracts report data only from the work records with a blank submission date.

When the flat files are submitted to DEEWR, the work data records are 'stamped' with a submission date. This process populates the submission date field to acknowledge that the data was submitted to DEEWR. These records are no longer reported in the flat file extracts for the related files if they are run again for the same reporting period. You can run the prerequisite process to load the work data records as many times as necessary prior to submission to 'refresh' the population for reporting.

When the process is re-run, any existing work data records for the submission year and period that have a blank submission date are deleted and replaced with records that have not previously been submitted for that reporting period. Any work data records with a non-blank submission date are retained and no longer reported. This mechanism allows institutions to adhere to the incremental reporting requirements of DEEWR and ensures that previously reported data is not included in subsequent files for the same period. Any data records that are found to be incorrect or require remission after submission must be added as revision records.

These steps summarize the process:

1. Process Work Records – run the prerequisite process to create the work data records.
2. Run the DEEWR Student Data files.
3. Load the file(s) into HEPCAT, review and validate data.
4. If validation errors exist and data must be corrected, correct the data and repeat from step 1.
5. If data is preliminary and not ready for submission to DEEWR, repeat from step 1.
6. Submit valid data to DEEWR by the required submission date.
7. Run the DEEWR Submission Processing process to date stamp the work data records for the file(s) submitted.
8. Repeat steps 1 to 7 for further reporting periods or sets of data in the reference year.

Past Course Completions - Annual Reporting and Revision Requirements

The Past Course Completions file does not require a prerequisite work data process. The process to generate the Past Course Completion file extract both creates the data records to retain a history of the completions data reported and generates the file.

These steps summarize the process:

1. Run the DEEWR Past Course Completion file.
2. Load the file into HEPCAT, review and validate data.
3. If validation errors exist and data must be corrected, correct the data and repeat from step 1.
4. If data is preliminary and not ready for submission to DEEWR, repeat from step 1.
5. Submit valid data to DEEWR by the required submission date.
6. Run the DEEWR Submission Processing process to date stamp the work data records for Past Course Completions.

Unit of Study Completions File – Annual Reporting

No DEEWR revision requirements exist for Unit of Study Completions reporting and consequently, no work data records exist for this extract. Only those enrollment records previously submitted in the Load/Liability File for the corresponding reporting year are included in the flat file extract.

These steps summarize the process:

1. Run the DEEWR Unit of Study Completions file.
2. Load the file into HEPCAT, review and validate data.
3. If validation errors exist and data must be corrected, correct the data and repeat from step 1.
4. If data is preliminary and not ready for submission to DEEWR, repeat from step 1.
5. Submit valid data to DEEWR by the required submission date.

Course of Study File

You can generate the Course of Study file as often as required for a given reference year. Any changes or additions that must be reported to DEEWR are treated as a replacement file and no work data records are retained.

These steps summarize the process:

1. Run the DEEWR Course of Study file.
2. Load the file into HEPCAT, review and validate data.
3. If validation errors exist and data must be corrected, correct the data and repeat from step 1.
4. If data is preliminary and not ready for submission to DEEWR, repeat from step 1.
5. Submit valid data to DEEWR by the required submission date.

Recording a Commonwealth Scholarship

This section discusses how to record a Commonwealth Scholarship.

Page Used to Record a Commonwealth Scholarship

Page Name	Definition Name	Navigation	Usage
Commonwealth Scholarships	SSR_CLS_STATUS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Commonwealth Scholarships, Commonwealth Scholarships	Add or update details about the Commonwealth Scholarships. Your institution allocates the scholarships to students.

Recording a Commonwealth Scholarship

Access the Commonwealth Scholarship page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Commonwealth Scholarships, Commonwealth Scholarships).

Commonwealth Scholarships

ID: SRAUS016 Gable,Cathy

Find | View All First 1 of 1 Last

*CS Code:

CAS Indigenous Payment

*Effective Date:

10/01/2008

31

*CS Status Code:

CAS Indigenous Payment Accept

Allocate Date:

01/01/2008

31

Accept Date:

09/01/2008

31

Commonwealth Scholarship page

CS Code (Commonwealth Scholarship Code)

Select the Commonwealth Scholarship code applicable to the student. The values available for selection are the Commonwealth Scholarships Type codes.

The institution reports the Commonwealth Scholarships Type codes to the Department of Education, Employment and Workplace Relations (DEEWR) as an element 545 value.

**CS Status Code
(Commonwealth Scholarship
Status Code)**

Select the Commonwealth Scholarship Status code applicable to the student.

The institution reports this value to DEEWR as an element 526 value. To ensure accurate reporting, you need to select the correct combination of CS code and CS Status code.

For CAS Indigenous Payments that the student accepts before the census date, you must select the status code in the CS Status Code field to indicate acceptance. Additionally, you must report the related record to DEEWR and stamp the record as submitted.

When you report the CAS Indigenous Payments that the student accepts before the census date for the second time, insert a row. In the new row, indicate whether the institution has confirmed or denied the scholarship after the first census date or at a time when your institution failed to confirm the scholarship.

Allocate Date

Enter the date on which the institution allocated the scholarship to the student.

The system does not use this date to select students for reporting purposes.

Institutions can use the Allocate Date values for internal reporting and information sharing.

Accept Date

Enter the date on which the student accepts the scholarship.

The Process Work Records process uses this date to select students with CAS Indigenous Payments.

You can record the Accept Date for all students who have accepted scholarships. Institutions can use the Accept Date values for internal reporting.

Generating the Student Data Files that Allow Revision

This section discusses how to:

- Load the DEEWR work records.
- View the DEEWR work records.
- Generate the DEEWR Student Data files.
- Generate the Annual File extracts.
- View Past Course Completion records.
- Date-Stamp records as submitted.

Pages Used to Generate the Student Data Files that Allow Revision

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Work Records	SSR_RC_DEST_WT	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Process Work Records, Process Work Records	Generate the DEEWR work records for Enrollment, OS-HELP, and Scholarships reporting.
View Enrollment Records	SSR_DEST_WRK_HDR	- Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View Enrollment Records - Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by EMPLID, View Enrollment Records	View the Enrollment work records that the system used to generate the DEEWR reporting extracts.
View Units of Study	SSR_DESTWRK_UNT	Click the Units of Study link on the View Enrollment Records page.	View units of study data.
View OS-HELP Records	SSR_DEST_WRK_OS	- Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View OS-HELP Records - Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by EMPLID, View OS-HELP Records	View the OS_HELP work records that the system used to generate the DEEWR reporting extracts.

Page Name	Definition Name	Navigation	Usage
View Scholarship Records	SSR_DEST_WRK_SS	- Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View Scholarship Records - Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by EMPLID, View Scholarship Records	View the Scholarship work records that the system used to generate the DEEWR reporting extracts.
Process Run History	SSR_DEST_WRK_HST	- Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, Process Run History - Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by EMPLID, Process Run History	Confirm work records processing.
Run DEEWR Student Data Files	SSR_RC_DEST1	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Student Data Files, Run DEEWR Student Data Files	Generate the Student Data files - Enrollment Load/Liability, Commonwealth Assisted Students, Scholarships, OS-HELP - for submission to DEEWR.
Run DEEWR Annual File Extracts	SSR_RC_DEST2	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Annual File Extracts, Run DEEWR Annual File Extracts	Generate the DEEWR Course of Study, Past Course Completions, and Unit of Study Completions files.

Page Name	Definition Name	Navigation	Usage
View PS Records	SSR_DEST_PS_HDR	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Course Completion Records, View PS Records	View records extracted for the Past Course Completions file.
View Completion Data	SSR_PSWRK_UNT	Click the Completion Details link on the View PS Records page.	View data extracted for the Past Course Completions file.
Process Run History	SSR_DESTPS_WRK_HST	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Course Completion Records, Process Run History	Confirm the processing for the Past Course Completions extract.
DEEWR Submission Processing	SSR_DEST_RC_ST	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Submission Processing, DEEWR Submission Processing	Enter the parameters to run the DEEWR Submission Processing process. This process assigns a submission date to the DEEWR work records submitted to DEEWR.

Loading the DEEWR Work Records

Access the Process Work Records page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Process Work Records, Process Work Records).

Process Work Records

Run Control ID: DEST [Report Manager](#) [Process Monitor](#) Run

Report Parameters

*Academic Institution: PeopleSoft Australia Uni

*Reference year:

*First or Second Half Year:

*Census Start Date: *Census End Date:

*CAS Indicator:

Scholarship Data

Scholarship Group:

Scholarship From Date:

Scholarship To Date:

Process Work Records page

Reference Year

Select the year for which you are running the report.

Note. You can select only the years that you have set up on the DEEWR Set Up page.

First or Second Half Year

Select which half of the year you are reporting.

Census Start Date and Census End Date

The system enters the census start and end dates based on the reference year.

CAS Indicator

(Commonwealth Assisted Students indicator)

When using the CAS Indicator to distinguish between Commonwealth and Non-Commonwealth assisted students, the Process Work Records process references the Commonwealth Assisted check box on the Liability Status page:

Commonwlth Asstd Students Only (Commonwealth assisted students only): The process finds records for which the check box is selected.

Non Cmwlth Asstd Stdnts Only (non-Commonwealth assisted students only): The process finds records for which the check box is not selected.

All Students: The process finds all records that meet the other parameter selections regardless of whether the check box is selected or cleared.

Scholarship Group

Select the scholarship group value to indicate the scholarship records that you want to report to DEEWR.

The Scholarship Group field allows you to cater to the different reporting deadlines for continuing and commencing scholarship holders. For example, if you want to report new scholarship holders first, then use the Scholarship Group field to select *Commencing Only* students.

Values for this field are *Commencing Only* and *Commencing and Continuing*. To exclude scholarships from processing, do not select any value.

Scholarship From Date and Scholarship To Date

Use the Scholarship From Date and Scholarship To Date fields to specify a date range applicable to the selection of commencing scholarship holders.

For CAS Indigenous Payments, the accept date on the Commonwealth Scholarship Page is relevant to this date range.

Students commencing a commonwealth scholarship other than CAS indigenous payments must have an enrollment record in Student Records with a census date within the range of the scholarship from and to dates.

See [Chapter 16, "\(AUS\) Setting Up Government Reporting," Setting Up DEEWR Reporting Codes, page 370](#)

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Viewing the DEEWR Work Records

Access the Work Records by Period or View Work Records by EMPLID components to view DEEWR work records.

Viewing Enrollment Records

Access the View Enrollment Records page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View Enrollment Records).

View Enrolment RecordsView OS-HELP RecordsView Scholarship RecordsProcess Run History

Academic Institution:PSAUSPeopleSoft Australia UniReference year:2006Second Half YearCensus Start Date:07/01/2006Census End Date:12/31/2006Process Run Date:12/01/2008User ID:SAMPLEAll Stdnts

CustomizeFindView All1-7 of 7FirstLast

ID	Name	Academic Program	Description	Units of Study
SRAUS042	Garner,Eva Maree	BSCI	Bachelor of Science	Units of Study
SRAUS043	Chan,Emma Caroline	BART	Bachelor of Arts	Units of Study
SRAUS044	Newman,Kai	BCOM	Bachelor of Commerce	Units of Study
SRAUS045	Edwards,Joel Ethan	GDART	Graduate Diploma in Arts	Units of Study
SRAUS047	Evans,Bailey	BENG	Bachelor of Engineering	Units of Study
SRAUS048	Bruce,Elliott Liam	BART	Bachelor of Arts	Units of Study
SRAUS049	Graham,Georgia Samantha	BCOM	Bachelor of Commerce	Units of Study

View Enrollment Records page

Click the Units of Study link to access the View Units of Study page and view class and financial data.

Viewing Units of Study

Access the View Units of Study page (click the Units of Study link on the View Enrollment Records page).

View Units of Study

Academic Institution: PSAUS PeopleSoft Australia Uni

Reference year: 2006 Second Half Year

ID: SRAUS042 Garner,Eva Maree

Customize | Find | View All | First 1-4 of 4 Last

Class Data		Financial Data					
HECS Exempt Status	Total Amount Charged	Paid Up Front	Total Loan	Loan Fee	EFTS	Submitted	
1 201	687.00	0.00	687.00	0.00	0.12500	12/01/2008	
2 201	687.00	0.00	687.00	0.00	0.12500	12/01/2008	
3 201	687.00	0.00	687.00	0.00	0.12500	12/01/2008	
4 201	687.00	0.00	687.00	0.00	0.12500	12/01/2008	

View Units of Study page: Financial Data tab

Each type of record to be reported (Class Enrollment, OS-HELP, Scholarships) includes a submitted column. If the Submitted field is blank, the DEEWR Submission process has not been run for this work data and the student and related data will be output to the corresponding flat file extract if the process is run. If a date value exists in the Submitted field, the record is available for revision. Only submitted data can be revised.

Viewing OS-HELP Records

Access the View OS-HELP Records page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View OS-HELP Records).

View Enrolment Records		View OS-HELP Records		View Scholarship Records		Process Run History	
Academic Institution:	PSAUS PeopleSoft Australia Uni						
Reference year:	2006 Second Half Year						
Half Year Begin Date:	07/01/2006	Half Year End Date:	12/31/2006				
Process Run Date:	12/01/2008	User ID:	SAMPLE	All Stdnts			
Customize Find View All First 1-4 of 4 Last							
Student Data		Loan Data					
ID	Name	Academic Program	Description	Liability Status	CHESSN		
SRAUS042	Garner,Eva Maree	BSCI	Bachelor of Science	240	3010170955		
SRAUS043	Chan,Emma Caroline	BART	Bachelor of Arts	240	2855737235		
SRAUS047	Evans,Bailey	BENG	Bachelor of Engineering	240	1839290906		
SRAUS048	Bruce,Elliott Liam	BART	Bachelor of Arts	240	3001906924		

View OS-HELP Records page: Student Data tab

Select the Loan Data tab:

Customize Find View All First 1-4 of 4 Last						
Student Data		Loan Data				
OS HELP Debt Incurral Date	Total Loan	Loan Fee	OS HELP Study Period Start	Primary Study Country	Secondary Study Country	Submitted
07/01/2006	5000.00	1000.00	07/15/2006	Norway		12/01/2008
07/03/2006	5000.00	1000.00	07/04/2006	Italy		12/01/2008
07/01/2006	5000.00	1000.00	07/03/2006	Portugal	Spain	12/01/2008
07/25/2006	5000.00	1000.00	07/20/2006	Solomon Islands	Vanuatu	12/01/2008

View OS-HELP Records page: Loan Data tab

Viewing Scholarship Records

Access the View Scholarship Records page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, View Scholarship Records).

View Enrolment Records		View OS-HELP Records		View Scholarship Records		Process Run History	
Academic Institution:	PSAUS		PeopleSoft Australia Uni				
Reference year:	2006		Second Half Year				
Census Start Date:	07/01/2006		Census End Date:	12/31/2006			
Process Run Date:	12/01/2008		User ID:	SAMPLE		All Stdnts	
Customize Find View All First 1-2 of 2 Last							
Student Data		CS Data					
ID	Name			CHESSN			
SRAUS044	Newman,Kai			2958167858			
SRAUS044	Newman,Kai			2958167858			

View Scholarship Records page: Student Data tab

Select the CS Data tab:

View Enrolment Records		View OS-HELP Records		View Scholarship Records		Process Run History	
Academic Institution:	PSAUS		PeopleSoft Australia Uni				
Reference year:	2006		Second Half Year				
Census Start Date:	07/01/2006		Census End Date:	12/31/2006			
Process Run Date:	12/01/2008		User ID:	SAMPLE		All Stdnts	
Customize Find View All First 1-2 of 2 Last							
Student Data		CS Data					
CS Code	CS Status		CS Termination Code		Submitted		
CAS Accommodation Scholarship	Current		Scholarship Active		12/01/2008		
CECS Associate Degree	Current		Scholarship Active		12/01/2008		

View Scholarship Records page: CS Data tab

Processing Run History

Access the Process Run History page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Work Records by Period, Process Run History).

View Enrolment RecordsView OS-HELP RecordsView Scholarship RecordsProcess Run History

Academic Institution:PSAUSPeopleSoft Australia UniReference year:2006Second Half YearCensus Start Date:07/01/2006Census End Date:12/31/2006Process Run Date:12/01/2008User ID:SAMPLEAll Stdnts

CustomizeFindView All1-8 of 8FirstLast

Run Date/Time	Process Type	Records Processed	User ID
08/03/2009 2:52AM	EN File - Enrollment	0	PS
12/01/2008 4:21PM	Stamp Work Records	56	SAMPLE
12/01/2008 4:21PM	Learning Scholarship	2	SAMPLE
12/01/2008 4:21PM	OS File - OS HELP	4	SAMPLE
12/01/2008 4:20PM	DU File - HECS Due	6	SAMPLE
12/01/2008 4:20PM	EN File - Enrollment	7	SAMPLE
12/01/2008 4:20PM	Load/Liability	25	SAMPLE
12/01/2008 4:18PM	Insert Work Records	31	SAMPLE

Process Run History page

Generating the DEEWR Student Data Files

Access the Run DEEWR Student Data Files page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Student Data Files, Run DEEWR Student Data Files).

Run DEEWR Student Data Files

Run Control ID: DEST
[Report Manager](#)
[Process Monitor](#)
Run

Report Parameters

*Academic Institution:

PSAUS

PeopleSoft Australia Uni

*Reference year:

2008

*First or Second Half Year:

First

From: 01/01/2008 To: 30/06/2008

*Census Start Date:

01/01/2008

*Census End Date:

30/06/2008

File Path:

c:\temp\

Run DEEWR Student Data Files page

Use this page to generate the Enrollment, Load/Liability, Commonwealth Assisted Students, Scholarships, OS-HELP, and Commonwealth Scholarships flat file extracts.

Most of the fields on this page are the same as the fields on the Process Work Records page—refer to the documentation about that page.

File Path Enter the path where you want the system to save the file.
The file path must end with a backslash (\).

Generating the Annual File Extracts

Access the Run DEEWR Annual File Extracts page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Annual File Extracts, Run DEEWR Annual File Extracts).

Run DEEWR Annual File Extracts

Run Control ID: DEEWR

[Report Manager](#) [Process Monitor](#) [Run](#)

Report Parameters

***Academic Institution:** PSAUS PeopleSoft Australia Uni

***Reference year:** 2008

File Path: \\output\deewr\

Run DEEWR Annual File Extracts page

Use this page to generate the Past Course Completion extract: when you click Run, select the DEEWR Past Course Completion process. You also run the DEEWR Course of Study File process and the DEEWR Unit of Study Completion process from this page.

Only Past Course Completion reporting has DEEWR revision requirements.

Viewing Past Course Completion Records

Use the View Past Course Completion Records (SSR_DEST_PS_WRK) component to view records and data extracted for the Past Course Completions file.

Viewing Completion Records

Access the View PS Records page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Course Completion Records, View PS Records).

View PS Records

Process Run History

Academic Institution: PSAUS PeopleSoft Australia Uni

Reference year: 2008

Process Run Date: 08/08/2009

User ID: PSAUS

Program Completed

Customize | Find | View All | 

First 1 of 1 Last

ID	Name	Academic Career	Career Nbr	Academic Program	Description	Completion Details
SRAUS042	Garner,Eva Maree	UGRD	0	BSCI	Bachelor of Science	Completion Details

View PS Records page

Click the Completion Details link to access the View Completion Data page and confirm the data elements returned in the extract.

Viewing Completion Data

Access the View Completion Data page (click the Completion Details link on the View PS Records page).

View PS Completion Data

Academic Institution: PSAUS PeopleSoft Australia Uni
Reference year: 2008
ID: SRAUS042 Garner,Eva Maree

Course Completion Elements [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Course Completion | **Student Data** |

	Course Code	CHESSN	Commencement Date	Attendance Mode	Attendance Type	Specialization Code	Exemption Granted	Scholarship Type
1	PHYSICS	3010170955	02/27/2006	Internal	Full-Time	010301	0	Indg Staff

View PS Completion Data page: Course Completion tab

This table describes the DEEWR data elements that populate the fields on this tab.

Field	DEEWR Data Element
Course Code	307
CHESSN	488
Commencement Date	328
Attendance Mode	329
Attendance Type	330
Specialisation Code	463
Exemption Granted	385
Scholarship Type	487

Select the Student Data tab:

View PS Completion Data

Academic Institution: PSAUS PeopleSoft Australia Uni
Reference year: 2008
ID: SRAUS042 Garner,Eva Maree

Course Completion Elements [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Course Completion | **Student Data** |

	Birthdate	BirthCountry	Year Arrival	Gender	Language	ATSI Code	Citizenship	Disability	Submitted
1	04/13/1956	1100	0001	Female	9998	3	3	00000000	08/08/2009

View Completion Data page: Student Data tab

The DEEWR Submission process populates the date in the Submitted field.

This table describes the DEEWR data elements that populate the fields on this tab.

Field	DEEWR Data Element
Birthdate	314
Birth Country	346
Year Arrival	347
Gender	315
Language	348
ATSI Code	316
Citizenship	358
Disability	386
Submitted	Indicates the date the completion record was submitted to DEEWR, populated by the DEEWR Submission process. A blank value indicates data has not yet been confirmed as submitted.

Viewing Process Run History

Access the Process Run History page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, View Course Completion Records, Process Run History).

[View PS Records](#)
[Process Run History](#)

Academic Institution: PSAUS PeopleSoft Australia Uni
Reference year: 2008
Process Run Date: 08/08/2009 **User ID:** PSAUS

Course Completion Processing History			
Run Date/Time	Process Type	Records Processed	User ID
08/08/2009 9:08PM	Stamp Work Records	11	PSAUS
08/08/2009 6:34PM	PS File-Past Course Completion	11	PSAUS

Process Run History page

This page confirms the processing for the Past Course Completions extract by indicating the number of records reported and or stamped by the Submission process. The Records Processed field includes any past course completion revisions reported.

Date-Stamping Records as Submitted

Access the DEEWR Submission Processing page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Submission Processing, DEEWR Submission Processing).

DEEWR Submission Processing

Run Control ID: DEEWR [Report Manager](#) [Process Monitor](#) Run

Report Parameters

*Academic Institution: PSAUS PeopleSoft Australia Uni

*Reference year: 2008

*First or Second Half Year: First

Records Submitted

☐ Enrollments ☐ Scholarships ☐ OS-HELP ☒ Past Course Completion

DEEWR Submission Processing page

Records Submitted

In the Records Submitted group box select the check box applicable to the records that you have submitted. You can select multiple check boxes.

Enrollments

If you select this check box and run the process, the system changes the submitted date from blank to the current system date for the unit of study and academic organization (AOU) records relevant to the Load Liability, Enrollment, and Commonwealth Assisted Students files.

Scholarships

If you select this check box and run the process, the system changes the submitted date from blank to the current system date for the scholarship work records that belong to the reference year and reporting period. The system also stamps as submitted any scholarship revision records for the same reference year and half-year period that are not stamped as submitted.

OS-HELP

If you select this check box and run the process, the system changes the submitted date from blank to the current system date for the OS-HELP work records that belong to the reference year and reporting period.

Past Course Completion

Select this check box to allow date-stamping of Past Course Completion records that have been submitted to DEEWR.

The First or Second Half Year run parameter is not applicable to past course completions; the system updates records with a submitted date based on the reference year parameter only for this annual extract.

The process date-stamps originally reported completion records for the reference year indicated and revised completion records less than or equal to the reference year indicated.

Processing DEEWR Revisions

This section provides an overview of adding revision records for Load/Liability, OS-HELP, and Commonwealth Scholarships, and discusses how to:

- Record revision records for half yearly submissions.
- Record revision records for past course completions.
- Generate the revision files and date stamp the revision records as submitted to DEEWR.

Adding Revision Records for Load/Liability, OS-HELP, and Commonwealth Scholarships

Records are entered in the DEEWR Revisions Processing component for:

- Previously submitted data that is subsequently found to be incorrectly reported.
- Remissions.
- Additional records for a previously reported student/course/unit of study census date.

Institutions are required to self-identify records that require revision.

Note. Only records that have a non-blank submission date in the associated work data record can be revised. By definition, a revision must have previously submitted data for the reporting period. You can not enter revision records until you have run the DEEWR Submission process to date stamp the corresponding data. For example, you cannot enter a remission for a unit of study if that enrollment record has not been recorded in the work data records and acknowledged as submitted to DEEWR with a submission date stamp.

Pages Used to Process DEEWR Revisions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Revision - LL	SSR_DEST_REV_LL	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL	Record LL revisions.
DEST Revisions Select a Class	SSR_DREV_SEL_CLASS	Click the Select a Class/AOU button on the Revision - LL page.	Select the class enrollment record that requires revision.
Retrieve LL Revisions	SSR_DREV_RETRV_LL	Click the Retrieve Revisions button on the Revision - LL page.	Retrieve the LL revision records that were previously recorded for the reporting period.
Revision - LL Data	SSR_DEST_REV_LL2	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL Data	Change the AOU, EFTSL, Census Date, or Work Experience Indicators.
Revision - LL Financial	SSR_DEST_REV_LL3	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL Financial	Change any of the key financial attributes that were reported.
Revision - OS	SSR_DEST_REV_OS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - OS	Record OS revisions.
DEST Revisions Select OS	SSR_DREV_SEL_OS	Click the Select an OS Record button on the Revision - OS page.	Select the OS-HELP Record that requires revision.
Retrieve OS Revisions	SSR_DREV_RETRV_OS	Click the Retrieve Revisions button on the Revisions - OS page.	Retrieve the OS revision records that were previously recorded for the reporting period.

Page Name	Definition Name	Navigation	Usage
Revision - SS	SSR_DEST_REV_SS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - SS	Record SS revisions.
DEST Revisions Select SS	SSR_DREV_SEL_SS	Click the Select a CS Record button on the Revision - SS page.	Select the Commonwealth Scholarship record for the student.
Retrieve SS Revisions	SSR_DREV_RETRV_SS	Click the Retrieve Revisions button on the Revision - SS page.	Retrieve the scholarship revision records previously recorded for the reporting period
Process History	SSR_DEST_REV_HST	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Process History	Confirm revisions processing.
Revision PS	SSR_DEST_REV_PS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS	View revision records.
DEEWR Revisions Select PS	SSR_DREV_SEL_PS	Click the Select a PS Record button on the Revision PS page.	Select revision data.
Retrieve Past Course Completion	SSR_DREV_RETRV_PS	Click the Retrieve Revisions button on the Revision PS page.	Retrieve submitted past course completions for revision entry.
Revision PS Academic	SSR_DEST_REV_PS2	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS Academic	View academic record data elements for the revision.
Revision PS Personal	SSR_DEST_REV_PS3	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS Personal	View personal record data elements for the revision.

Page Name	Definition Name	Navigation	Usage
Run DEEWR Revisions Extracts	SSR_RC_DEST_REV	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Revisions Extracts, Run DEEWR Revisions Extracts	Generate and date stamp the revisions files for submission to DEEWR.

Recording Revision Records for Half Yearly Submissions

Use the DEEWR Revisions Processing (SSR_DEST_REV_INPUT) component to record revision records for half yearly submissions.

Recording Load/Liability Revisions

Revisions for Load/Liability data can also result in a requirement to submit a Revised Commonwealth Assisted Students File. If the financial data attributes for the LL record indicate the student is Commonwealth Assisted, the revision record is automatically flagged for inclusion in the additional revisions file.

Revision - LL

Access the Revision - LL page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL).

Revision - LL		Revision - LL Data	Revision - LL Financial	Revision - OS	Revision - SS	Process History
Academic Institution:	PSAUS	PeopleSoft Australia Uni				
Reference year:	2006					
Half Yr:	Second Half Year	Retrieve Revisions				
Revision Type Find View All First 1 of 4 Last						
*ID:	SRAUS042	Garner,Eva Maree				
Revision Type	Revision					
Select a Class/AOU						
Academic Career:	UGRD	Undergraduate				
Academic Program:	BSCI	Bachelor of Science				
Term:	0569	Semester 2 - Spring 2006				
Class Nbr:	1002	ELEC 101	Electrical Engineering 1			
AOU Code:	073	Department of Electrical Eng				
*Authorizing Officer:	0002	Jones,Susan				

Revision - LL page

Select a Class/AOU

Click to access the DEST Revisions Select a Class page and select the class enrollment record that requires revision. You can select only those records from the original submission that the system has stamped as submitted to DEEWR.

Revision Type

Select the type of revision.

Values are: *Addition, Revision, Deletion, and Remission.*

Retrieve Revisions

Click to access the Retrieve LL Revisions page and retrieve the Load/Liability revision records that were previously recorded for the reporting period.

Revision - LL Data

Access the Revision - LL Data page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL Data).

Revision - LL	Revision - LL Data	Revision - LL Financial	Revision - OS	Revision - SS	Process History
Academic Institution: PSAUS PeopleSoft Australia Uni Reference year: 2006 Half Yr: Second Half Year					
Enrolment Data Find View All First 1 of 4 Last					
*ID:		SRAUS042		Garner,Eva Maree	
*Revision Type:		Revision			
*Class Nbr:		1002	ELEC 101	Electrical Engineering 1	
*AOU Code:		073	Department of Electrical Eng		
Census Date:		08/31/2006	Revised EFTSL:		1.00000000
EFTSL:		125000000	Revised DEST EFTSL:		1000000000
Work Exp Ind:		Not Wholly	*Revised Work Exp Ind:		Not Wholly

Revision - LL Data page

Use this page to change the values in the AOU Code,Census Date,EFTSL, or Work Exp Ind fields.

The fields are populated with data that was previously reported. If the EFTSL value that was reported was incorrect, enter the correct value in the Revised EFTSL field.

Revision - LL Financial

Access the Revision - LL Financial page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - LL Financial).

Revision - LL

Revision - LL Data

Revision - LL Financial

Revision - OS

Revision - SS

Process History

Academic Institution:PSAUSPeopleSoft Australia Uni

Reference year:2006

Half Yr:Second Half Year

Financial Data

Find | View All

First1 of 4Last

ID:SRAUS042Garner,Eva Maree

Revision Type:Revision

Class Nbr:1002ELEC 101Electrical Engineering 1

AOU Code:073Department of Electrical Eng

Liability Status:201Revised Liability Status:201

Total Loan:687.00Revised Total Loan:687.00

Loan Fee:Revised Loan Fee:

Paid Up Front:Revised Paid Up Front:

Total Amount Charged:687.00Revised Total Charged:687.00

Revision - LL Financial page

Recording OS-HELP Revisions

Access the Revision - OS page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision - OS).

Revision - LL

Revision - LL Data

Revision - LL Financial

Revision - OS

Revision - SS

Process History

Academic Institution:

PSAUS

PeopleSoft Australia Uni

Reference year:

2006

Half Yr:

Second Half Year

Retrieve Revisions

OS-HELP Revision

Find | View All

First

1 of 2

Last

ID:

SRAUS043

Chan,Emma Caroline

Revision Type

Revision

Select an OS Record

Academic Program:

Liability Status:

Study Period:

Primary Study Country:

Revised Primary Country:

Secondary Study Country:

Revised Secondary Country:

Country:

Authorizing Officer:

Incurral Date:

Revised Incurral Date:

Total Loan:

Revised Total Loan:

Revision - OS page

- Select an OS Record

Click to access the DEST Revisions Select OS page and select the OS-HELP Record that requires revision. You can select only those records from the original submission that the system has stamped as submitted to DEEWR.
- Revision Type

Select the type of revision.
Values are: *Revision* and *Deletion*.
If the record selected is of type revision, you can change any of the enabled fields on the page.
- Retrieve Revisions

Click to retrieve the OS revision records that were previously recorded for the reporting period.

Recording Scholarship Revisions

Access the Revision – SS page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, DEEWR Revisions Processing, Revision — SS).

Revision - LL

Revision - LL Data

Revision - LL Financial

Revision - OS

Revision - SS

Process History

Academic Institution:

PSAUS

PeopleSoft Australia Uni

Reference year:

2006

Half Yr:

Second Half Year

Retrieve Revisions

Scholarships Revision

Find | View All

First

1 of 1

Last

'ID:

SRAUS044

Newman,Kai

'Revision Type:

Revision

Select a CS Record

Revised

CS Code:

'CS Code:

CS Status Code:

'CS Status Code:

CS Termination Code:

'CS Termination Code:

'Authorizing Officer:

Revision - SS page

ID	Enter or select the Student ID for whom you want to revise a previously reported scholarship record.
Revision Type	Select the type of revision. Values for this field are <i>Revision</i> , <i>Addition</i> , and <i>Deletion</i> .
Select a CS Record (Select a Commonwealth Scholarship Record)	Click to access the Revision Select Scholarship page, where you can select the Commonwealth Scholarship record for the student. You can select only those records, from the original submission, that the system has stamped as submitted to DEEWR. If the revision type is <i>Revision</i> or <i>Deletion</i>, the Revision - SS page displays the previously reported values for a selected record.
CS Code (Commonwealth Scholarship code)	Displays the Commonwealth Scholarship code for the stamped scholarship record.
CS Status Code (Commonwealth Scholarship Status Code)	Displays the status code for the stamped scholarship record.
CS Termination Code (Commonwealth Scholarship Termination Code)	Displays the termination code for the stamped scholarship record.
Revised CS Code (Revised Commonwealth Scholarship Code)	Select the scholarship code that requires a revision addition. The system enables this field only for the revision type of <i>addition</i> .

**Revised CS Status Code
(Revised Commonwealth
Scholarship Status Code)**

The value reported in the original submission appears by default. If the revision type is *Revision*, you can enter a value that differs from the value reported in the original submission.

**Revised CS Termination
Code (Revised
Commonwealth Scholarship
Termination Code)**

This field is available for entry only if the Revised CS Status Code is *Terminated Scholarship*.

Retrieve Revisions

Click to retrieve the scholarship revision records previously recorded for the reporting period.

Record Revision Records for Past Course Completions

This section discusses how to:

- View revision records.
- Select DEEWR revision data.
- View academic record data elements for the revision.
- View personal record data elements for the revision.

Viewing Revision Records

Access the Revision PS page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS).

Revision PS		Revision PS Academic		Revision PS Personal	
Academic Institution:	PSAUS	PeopleSoft Australia Uni			
Reference year:	2008	Retrieve Revisions			
Past Course Completion Revision					
Find View All First 1 of 2 Last					
*ID:	SRAUS043	Chan, Emma Caroline			
*Revision Type:	Revision				
	Select a PS Record	Reference year: 2008			
Academic Career:	UGRD				
Academic Program:	BART				
Student Career Nbr:	0				
*Course Code E307:	MUSIC	Music			
*Specialization E463:	100101	Veterinary Science			
CHESSN E488:	2855737235				

Revision PS page

ID

This prompt returns students with submitted past course completion records for the institution and reference year that you select.

Revision Type

Select a revision type. Values are:

- *Revision*: Select to revise the value of an element previously reported incorrectly. A revision does not allow updates to elements classified as unique identifiers.
- *Deletion*: Select to delete a record that was previously reported. Revisions of this type do not allow updates to any elements reported.
- *Addition*: Select to report an additional record for a student. Revisions of this type allow updates to unique identifiers Course Code, Specialisation, and CHESSN.

Note. You do not have to enter a revision type of *Addition* to reflect incorrect reporting of a unique identifier if the source data is changed for the reference year. The past course completions extract acknowledges changes to key identifiers for previously reported data and extract the record. A warning message appears when the Past Course Completions process is generated if additional data is extracted for a student with submitted records for the program. The warning indicates that deletion records may be necessary. Consequently, a change to a unique identifier only requires the revision deletion to be entered if the source data is changed for the incorrect element.

Academic Career, Academic Program, and Student Career Nbr

Displays the data applicable to the completion record that was submitted.

Course Code E307, Specialization E463, and CHESSN E488

Displays the values reported for Elements 307, 463, and 488. These fields are enabled only for a revision type of addition because they are unique identifiers.

Retrieve Revisions

Click this button to access the Retrieve Past Course Completion page and retrieve previously saved revision records for institution and reference year on the Retrieve Past Course Completion page.

Select a PS Record

Click this button to access the DEEWR Revisions Select PS page, where you can select the record to populate the fields on the Revision PS page.

All revision types must be initiated by selecting a previously reported record. The data displayed on the DEEWR Revisions Select PS page reflects the elements that are already reported.

Selecting DEEWR Revision Data

Access the DEEWR Revisions Select PS page (click the Select a PS Record button on the Revision PS page).

DEEWR Revisions Select PS

Academic Institution:PSAUSPeopleSoft Australia Uni

Reference year:2008

ID:SRAUS042Garner,Eva Maree

Data Reported

Customize | Find |  First 1 of 1 Last

	Select Completion	Course Code E307	CHESSN E488	Specialization E463	Commencement Date E328	Mode of Attendance E329	Type of Attendance E330	Exemption Granted E385	Scholarship Type E487	Birthdate E314	BirthCountry E346	Year of Arrival E347	Gender E315	Home Language E348	ATSI Code E316	Citizenship E358	Disability E386	Submitted
1	☐	PHYSICS	3010170955	010301	02/27/2006	Internal	Full-Time	0	Indg Staff	04/13/1956	1100	0001	Female	9998	3	3	00000000	08/08/2009

DEEWR Revisions Select PS page

Select Completion

Select the check box for the completion data that requires revision.

Viewing Academic Record Data Elements for the Revision

Access the Revision PS Academic page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS Academic).

Revision PS

Revision PS Academic

Revision PS Personal

Academic Institution:

PSAUS

PeopleSoft Australia Uni

Reference year:

2008

Course Completion Updatable Elements

Find | View All

First 2 of 2 Last

ID:

SRAUS043

Chan,Emma Caroline

Commencement Date E328:

01/01/2008

Commencement Date E328:

01/01/2008

Mode of Attendance E329:

Internal

*Mode of Attendance E329:

Internal

Type of Attendance E330:

Full-Time

*Type of Attendance E330:

Full-Time

Exemption Granted E385:

0

Exemption Granted E385:

0

Scholarship Type E487:

None

*Scholarship Type E487:

None

Revised Elements

Revision PS Academic page

This page displays originally reported data on the left side, and revised elements on the right side. All revised elements on this page are available to be updated for revision types of revision and addition. The value for the Revised Elements field defaults to the value as originally reported. No revised elements appear for a revision type of deletion.

Viewing Personal Data Record Elements for the Revision

Access the Revision PS Personal page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Course Completion Revisions, Revision PS Personal).

Revision PS		Revision PS Academic		Revision PS Personal	
Academic Institution:	PSAUS	PeopleSoft Australia Uni			
Reference year:	2008				
Course Completion Updatable Elements Find View All First 1 of 2 Last					
ID:	SRAUS043	Chan,Emma Caroline			
Revised Elements					
Birthdate E314:	05/12/1983	BirthDate E314:	05/12/1983		
Gender E315:	Female	*Gender E315:	Female		
ATSI Code E316:	2	*ATSI Code E316:	Non Indig		
Citizenship E358:	1	Citizenship E358:	1		
BirthCountry E346:	1100	BirthCountry E346:	1100		
Year of Arrival E347:	0001	Year of Arrival E347:	0001		
Home Language E348:	9999	Home Language E348:	9999		
Disability E386:	11000001	Disability E386:	11000001		

Revision PS Personal page

This page displays data on the same basis as the Revision PS Academic page.

Generating the Revision Files and Date–Stamping the Revision Records as Submitted

Access the Run DEEWR Revisions Extracts page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Run DEEWR Revisions Extracts).

Run DEEWR Revisions Extracts	
Run Control ID: PS	Report Manager Process Monitor Run
Report Request Parameters	
*Academic Institution:	PSAUS PeopleSoft Australia Uni
*Reference year:	2006
*First or Second Half Year:	Second
Input/Output file:	\\psbldfs\dfs\hcm\CS_DEV\testfiles\DEEWR\rd

Run DEEWR Revisions Extracts page

When you click Run, select the DEEWR Revisions Files process to generate the flat file extracts for the Revised Load Liability, Revised Commonwealth Assisted Students, and Revisions files.

Select the Stamp DEST Revision Records process to date-stamp the revision records as submitted to DEEWR.

Processing the DEEWR Applications and Offers Files

This section discusses how to:

- Generate the Applications and Offers files.
- Purge Applications and Offers data.

Pages Used to Process the Applications and Offers Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Applications and Offers Files	SSR_DEEWR_AO_RNC	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Applications & Offers Files, Applications & Offers Files	Specify parameters to generate the files in the Applications & Offers Collection for submission to DEEWR.
Applications and Offers Purge	SSR_DEEWR_AO_PRG	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Applications & Offers Purge, Applications & Offers Purge	Purge Applications and Offers data.

Generating the Applications and Offers Files

Access the Applications and Offers Files page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Applications & Offers Files, Applications & Offers Files).

Applications & Offers Files

Run Control ID: DEEWR
[Report Manager](#)
[Process Monitor](#)
Run

Parameters

'Academic Institution: PSAUS PeopleSoft Australia Uni

'Reference year: 2010

'Profile: AO_CD1 CSP UGRD Domestic

'Reference Date: 10/15/2009

'Reporting Period: 1

'Current Year 12 Year: 2009

'Output File Path: c:\reports\deewr\

Admit Term

Find | View All First 2 of 2 Last

'Admit Term: 0641 2010 Semester 1

+

-

Applications and Offers Files page

The Reference Year and Reporting Period values are used in the file naming convention.

The reference date is relevant to the effective date logic for many elements.

Profile

Select a profile from the values that you set up in the Applications and Offers Profile (SSR_DEEWR_AO_PRFL) component, to define the scope of data for this reporting requirement.

Current Year 12 Year

Select a year value that is equivalent to the most recent year in which Australian State and Territory school-leavers are completing or have just completed year 12.

This run parameter is used to report values for elements that are only appropriate to current year 12: Elements 369, 710, and 702.

See [Chapter 16, "\(AUS\) Setting Up Government Reporting," Setting Up for Collecting Applications and Offers Data, page 379.](#)

Purging Applications and Offers Data

Access the Applications and Offers Purge page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, DEEWR, Applications & Offers Purge, Applications & Offers Purge).

Applications & Offers Purge

Run Control ID: 1905506000 [Report Manager](#) [Process Monitor](#) Run

Parameters	
*Academic Institution:	PSAUS PeopleSoft Australia Uni
*Reference Year From:	2010 *Reference Year To: 2010
Reporting Period From:	1 Reporting Period To: 1
Profile:	
Reference Date From:	Reference Date To:

Applications and Offers Purge page

The Applications and Offers Purge (SSR_DEEWR_PR) process deletes rows from the following data records based on the parameters that you enter:

- SSR_DEEWR_AOAPP
- SSR_DEEWR_AOPRE
- SSR_DEEWR_AOOFF

If you do not select a value in the Reporting Period From optional field, the process uses all reporting periods for the institution, reference year range, profile, and reference date range that you specify.

The process performs similarly when you do not enter a value in other optional fields.

Reference Year To	The year that you select in the Reference Year From field appears by default. You can select a different year.
Reporting Period To	The reporting period that you select in the Reporting Period From field appears by default. You can select a different reporting period.
Profile	Select a profile from the values that you set up in the Applications and Offers Profile (SSR_DEEWR_AO_PRFL) component.
Reference Date To	The reference date that you select in the Reference Date From field appears by default. You can select a different reference date.

See [Chapter 16, "\(AUS\) Setting Up Government Reporting." Setting Up for Collecting Applications and Offers Data, page 379.](#)

Generating Centrelink Reports

This section provides an overview of Centrelink reporting and discusses how to:

- Load the XML Request file.
- Confirm the Search/Match parameters.
- Review the suspense data status.
- Review the Request file suspense data.
- Generate the XML Response file.
- Review the Response file data.
- Purge the suspense data.

Understanding Centrelink Reporting

The Centrelink Academic Reassessment Transformation (CART) system allows for electronic exchange of information between Centrelink and academic institutions.

The following is an overview of the process to load a CART Request file and generate an associated Response file for return to Centrelink.

1. Download the request file from the Centrelink Business Contact site. This XML request file contains information about students who are attending your institution and have received Centrelink payment.
2. Use the CART Load process to load the request file and match the data to students in your database. For the records in the request file that have a Student ID, the system validates the first and last name, date of birth, and gender. For the records without a Student ID or where the ID is not valid, the system uses the search/match parameters to verify the data.
3. Use the CART Suspense component to review data in the request file and filter for match exceptions. This component also confirms the student's enrollment data when the response file is generated.
4. Use the CART Response File page to create an XML response file that confirms a student's study workload. The response file confirms workload information for those students whose data has been loaded through the CART Request File Processing page.
5. Log in to the Centrelink Business Contact site and upload the response file.
6. Use the CART Purge page to delete the suspense data when the response file has been returned to Centrelink and the information is no longer required.

Centrelink conducts enrollment checks of students in receipt of student assistance from the Commonwealth in order to independently verify information that has been provided to Centrelink by customers, detect incorrect payments resulting from incorrect or incomplete information provided by recipients, and to assist in the timely detection of discontinuation of study or a reduction in workload. The enrollment checks are conducted by matching Centrelink data against data provided by the institution to determine a student's enrollment status and workload where applicable.

Pages Used to Generate Centrelink Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CART Load	SSR_CART_LOAD	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Load, CART Load	Designate the directory location of the request file that you are loading.
Search Parm	SSR_CART_LOAD	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Load, Search Parm	Set the search parameter to find records in the request file that do not have a student ID or have an invalid student ID
CART Suspense	SSR_CART_SUS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Suspense	This page confirms the results of search/match or whether a Student ID is matched. Search/match messages reflect the inconsistencies in data – for example, cases where the Student ID in the request file is invalid and where the personal data in the request file is inconsistent with the student data in the database.
CART Request	SSR_CART_SUS	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Request	Review the student's personal information as provided in the request file. The system sets a Matched ID field value if a definitive match was confirmed during the CART Load process. Alternatively, you can enter a Matched ID field value. If no match was found, the field will be blank but editable.
CART Response File	SR_CART_RESPONSE	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Response File, CART Response File	Generate the XML response file for submission to Centrelink.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CART Response	SSR_CART_RESPONSE	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Response	Review the response file data for submission to Centrelink.
CART Purge	SSR_CART_PURGE	Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Purge, CART Purge	Purge request file data, any related processing messages, and response file data from the suspense tables.

Loading the XML Request File

Access the CART Load page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Load, CART Load).

The screenshot shows the 'CART Load' page. At the top, there are two tabs: 'CART Load' (selected) and 'Search Params'. The main heading is 'CART Request File Processing'. Below this, there is a 'Run Control ID' field with the value 'CA01'. To the right of this field are two links: 'Report Manager' and 'Process Monitor', followed by a yellow 'Run' button. Below the 'Run' button is a section titled 'File Path and Name' with a text input field containing the path '\\bur\\load\\file.xml'.

CART Load page

File Path and Name The file name must have an .xml file extension.

The CART Request File process loads the request file data into the suspense tables. Additionally, the process matches the student data that the request file contains with the student data in your database.

Confirming the Search/Match Parameters

Access the Search Params page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Load, Search Params).

CART Load

Search Params

Run Control ID: CA01

[Report Manager](#) [Process Monitor](#)

Run

*Search Parameter:

CS_CART

CART

No Match Found

	No Match	Verified	Suspend	Ignore
New:	☒	☐	☐	☐

Match(es) Found

[Find](#) | [View All](#)

1-2 of 2

Order Nbr:	10	CART 1	*****Parameters Refreshed*****	
One Match:	☐	☒	☐	☐
Multiple Matches:	☐	☒	☐	☐

Order Nbr:	20	CART 2		
One Match:	☐	☒	☐	☐
Multiple Matches:	☐	☒	☐	☐

Search Params page

The system uses the Search/Match parameters to find records in the request file that do not have a student ID or have an invalid student ID.

Search Parameter

Select the search parameter code that includes the search fields that you need to use to perform the search.

No Match Found

New

Select No Match for records in the request file that cannot be matched to students in the database. The system does not assign a matched ID to these records.

Suspend and Ignore are not relevant for No Match.

Matches Found

One Match and Multiple Matches

Select No Match for records in the request file that cannot be matched to students in the database. The system does not assign a matched ID to these records.

Select Verified to set the Matched ID mapped to the Student ID found in the search/match processing. This value is typically set for One Match.

Select Suspend when the results cannot be reliably matched to a student in the database. This value is typically set for the multiple matches result. The system does not enter any value for the Matched ID field. Additionally, the response file returns the value *NMF*(no match found) for the enrollment match result unless you have manually updated the record for the Matched ID.

Select Ignore to force the processing result to No Match. The system does not enter any value for the Matched ID field. Additionally, the response file returns the value *NMF* for the enrollment match result unless you have manually updated the record for the Matched ID.

Reviewing the Suspense Data Status

Access the CART Suspense page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Suspense).

CART Suspense		CART Request		CART Response													
Record Reference Nbr:	307272808	Request ID:	1														
Request Date:	01/03/2008	Response Date:	30/03/2008														
System Code:	CART																
Processing Options																	
Edit:	Complete	Search:	Complete	Result:	Verified												
Search / Match Results																	
Order Number:		Matches:															
Messages																	
Customize Find View All First 1 of 1 Last																	
<table border="1"> <thead> <tr> <th></th> <th>Message Severity</th> <th>Message Number</th> <th>Message Text</th> <th>Description</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>							Message Severity	Message Number	Message Text	Description	Comments	1					
	Message Severity	Message Number	Message Text	Description	Comments												
1																	

CART Suspense page

The CART suspense page provides the status of a suspense record about the loading, search/match, and the response file creation processes.

The Request ID field displays the unique identifier for a request file. The CART Request File process uses the Last CART Request ID counter on the SA Features page to assign a Request ID to a request file.

Processing Options

Edit

Displays the status of the record in relation to the load process.

Values are:

Complete: The program processed the record without any error.

Error: The program encountered problems when processing the record.

Perform: You set this value manually. Use this value for informational purposes.

Search

Displays the status of the record in relation to the search/match process.

Values are:

Complete: The search/match process ran without any error.

Error: The search/match process encountered errors.

Perform: You set this value manually. Use this value for informational purposes.

Result

Displays the status of the record in relation to the load process.

Details are confirmed in the following table.

The following table describes the Result values.

Result Value	Meaning	How the Value is Set
Awaiting	The system sets this value automatically if a record loaded from the request file had a Matched ID recorded which was subsequently removed. The value will automatically change from <i>Verified</i> to <i>Awaiting</i> in this case.	Set if a record with a matched ID has that ID removed and saved.

Result Value	Meaning	How the Value is Set
Inconsist	The system sets this value if the student ID in the request file and the student personal data in your database does not match. If a value of <i>Inconsistent</i> is set, a message(s) appears to verify the discrepancy. The following issues result in a inconsistent value: • Date of Birth does not correspond to Date of Birth for the Student ID in the request file. • Primary or preferred names of the student do not match with any of the name occurrences for the Student ID in the request file. • Student gender is inconsistent with the request file data. A message also appears on the Messages tab if the Student ID in the request file does not exist in the database. If the student ID does not exist, the system again uses search/match to match the student. Even if the search/match process finds a matched ID, the message appears because the process initially failed to find a matched ID.	
Multiple	The system sets this value if the request file data matches multiple students in the database and the search/match option is set to suspend for multiple matches.	Set by the CART Request load and search/match processes.
No Match	The system sets this value if data was not matched for a record in the request file.	Set by the system during the search/match process if no match was found in your database.
Verified	The system sets this value if the matching process confirmed the ID in the request file with the personal data in the database or if the search/match process found a definitive match for the student. The system also sets the value of verified automatically if you enter and save a Matched ID for a record that the load/search/match program was unable to match.	Set by the CART Request load and search/match processes if a record with a student ID in the request file matches with primary or preferred name, date of birth and gender, or the search/match process resulted in a definitive match.

Reviewing the Request File Suspense Data

Access the CART Request page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Request).

CART Suspension

CART Request

CART Response

Record Reference Nbr:

307272808

Request ID:

1

Request Date:

01/03/2008

Response Date:

30/03/2008

System Code:

CART

Centrelink ID:

SRAUSC013

Matched ID:

SRAUSC013

 Jones, Sarah

Date of Birth:

21/03/1977

Gender:

Female

Names

Find | View All

First

1 of 1

Last

First Name:

Sarah

Middle Name:

Last Name:

Jones

CART Request page

Generating the XML Response File

Access the CART Response File page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Response File, CART Response File).

CART Response File page

The CART Response File process generates a response file for all records in the request file. The response file includes the value No Match Found (NMF) for records without a Matched ID (when the processing option result is not verified).

You can generate the response file for a single request as many times as required before submission to Centrelink.

Academic Institution	Select the institution applicable to the enrollment data to be reported in the response file. Only those institutions that are recorded on the Centrelink Setup page are available for selection.
Request ID	Select the request ID for which you want to generate the response data.
Census Start Date and Census End Date	The census start and end dates control the enrollment data that is reflected in the reported workload. The response file includes the enrollment records that fall within the specified census date range.
Phone Type	Enter a phone type if you need to report optional student contact details in the response file. The response file includes phone numbers of only those students that have a blank match result. You can leave this field blank.
Email Type	Enter an email type if you need to report optional student contact details in the response file. The response file includes email addresses of only those students that have a blank match result. You can leave this field blank.

File Output

Enter the file path for which the process should create the XML file in and the name of the XML file. The file extension must be .xml.

Reviewing the Response File Data

Access the CART Response page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Suspense, CART Response).

CART Suspense		CART Request		CART Response				
Record Reference Nbr:	307272810		Request ID:	1				
Request Date:	01/03/2008		Response Date:	30/03/2008				
System Code:	CART							
Student ID:	SRAUSC004		Brown,Kate					
Enrollment Match Result:								
University Study Curriculum Details Find View All First ◀ 1 of 1 ▶ Last								
Academic Program:	BCOM		Description:	Bachelor of Commerce				
Course Start Date:	18/07/2005		Course End Date:					
Mode of Attendance:	Multi-mode		Cross Institution:					
Year Based Subject:			Master Or PHD:	EFTSL Total: 1.12500				
Enrollments Customize Find View All ⛶ First ◀ 1-6 of 9 ▶ Last								
	Term	Subject Area	Catalog Nbr	Class Nbr	Census Date	EFTSL	Unit EFTSL Withdrawn	Withdrawn Date
1	0581	ACCT	102	1014	31/03/2007	0.12500	0.12500	05/04/2007
2	0581	ACCT	103	1030	31/03/2007	0.12500		
3	0589	ACCT	103	1032	31/08/2007	0.12500		
4	0589	ACCT	104	1036	31/08/2007	0.12500		
5	0589	ACCT	201	1040	31/08/2007	0.12500		
6	0599	ECON	101	1002	18/01/2008	0.12500		

CART Response page

Note. The Course End Date and Year Based Subject fields do not display any value. This is because the CART Response File process does not enter values for these fields.

Purging the Suspense Data

Access the CART Purge page (Records and Enrollment, Enrollment Reporting, AUS Regulatory Reporting, Centrelink, CART Purge, CART Purge).

CART Purge

Run Control ID: DEST

[Report Manager](#) [Process Monitor](#)

Run

*Request ID From:

*Request ID To:

CART Purge page

Request ID From and Request ID To

Select the request ID range for which you want the data to be purged. The system assigns a request ID when you run the CART Request File process.

Chapter 51

(CAN) Generating Canadian Government Reports

This chapter provides an overview of Canadian Government report generation, lists prerequisites, and discusses how to:

- (Optional) Generate a report of selected students.
- (Optional) Freeze a student list.
- Run the PSIS extract process.
- Run the USISE extract process.
- Run the CIS extract process.
- Run the MET extract process.
- Run the OUAC extract process.
- Verify report results and view the audit report.
- Review report data.
- (Optional) Correct reporting data.
- Archive extract table data.

See Also

Chapter 17, "(CAN) Setting Up Government Reporting," page 401

Understanding Canadian Government Report Generation

Generating Canadian government reports is a multiple step process. An overview of the process is as follows:

1. Set up all of your government reporting data and populate the Student List table.
2. (Optional) Generate a report of students.
3. (Optional) Freeze the student list.
4. Run the extract process.

5. Review the report data.
6. (Optional) Correct the source pages or online pages and rerun the extract process.
Or, correct the data directly in the extract table.
7. Generate the flat file.
8. Deliver the flat file to the federal or provincial government.
9. Archive the extract data table file.

These steps are discussed in the following sections.

Prerequisites

Before you can generate extract reports and flat files you must:

- Set up your system for Canadian Government reporting.
- Populate the Student List.

See Also

[Chapter 17, "\(CAN\) Setting Up Government Reporting," page 401](#)

[Chapter 17, "\(CAN\) Setting Up Government Reporting," Loading the Student ID Table, page 450](#)

(Optional) Generating a Report of Selected Students

The Student Selection report contains a list of students that correspond to those on the Student List page. You can generate the report before you run the reports extract program.

Page Used to Generate the Student Selection Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Selected Student Report	RUNCTL_CAN_SRSTSEL	Records and Enrollment, Government Reporting Canada, Reports, Selected Student Report, Selected Student Report	Define run parameters for the Student Selection report (SRSTSEL).

Generating a Student List Report

Access the Selected Student Report page (Records and Enrollment, Government Reporting Canada, Reports, Selected Student Report, Selected Student Report).

Academic Institution	Enter the institution for which you want to generate a student selection report.
Report Type	Select the report type for which you want to generate a student selection report.
Report Period	Enter the report period for which you want to generate a student selection report. This field prompts against the report period table.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRSTSEL process at user-defined intervals.

(Optional) Freezing a Student List

The PeopleSoft system provides you with the ability to "freeze" the student list.

Running the freeze process is optional. As a result of running the freeze process, the system prevents you from making changes or additions to the CAN_STDNT_LST table after the freeze date you specify. You can change key information after you run the freeze process. The business processes of your institution determine the timing of this process.

Page Used to Freeze a Student List

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Freeze Student List	RUNCTL_CAN_FRZE	Records and Enrollment, Government Reporting Canada, Processes, Freeze Student List, Freeze Student List	Define run parameters for the Student ID Freeze report (SRFREEZE).

Running the Student List Freeze Process

Access the Freeze Student List page (Records and Enrollment, Government Reporting Canada, Processes, Freeze Student List, Freeze Student List).

Academic Institution	Enter the institution for which you want to freeze a student list.
Report Type	Select the report type for which you want to freeze a student list.

- Report Period** Enter the report period for which you want to freeze a student list. This field prompts against the report period table.
- Student ID Freeze Date** Enter the date on which you want to freeze student list records.

Click Run to run this request. PeopleSoft Process Scheduler runs the SRFREEZE process at user-defined intervals.

Running the PSIS Extract Process

This section discusses how to:

- Run the PSIS Institution process.
- Run the PSIS Student process.

Pages Used to Run the PSIS Extract Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PSIS Institution Process	RUNCTL_CAN_ESIS_I	Records and Enrollment, Government Reporting Canada, Processes, PSIS Institution Process, PSIS Institution Process	Define run parameters for the Create Extract for PSIS Instit process (SRXTRESI) and the Create Flat file for PSIS Inst process (SRCRFESI).
PSIS Student Process	RUNCTL_CAN_ESIS_S	Records and Enrollment, Government Reporting Canada, Processes, PSIS Student Process, PSIS Student Process	Define run parameters for the Create Extract for PSIS Stdnt process (SRXTRESS) and the Create Flat file for PSIS Std process (SRCRFESS).

Running the PSIS Institution Process

Access the PSIS Institution Process page (Records and Enrollment, Government Reporting Canada, Processes, PSIS Institution Process, PSIS Institution Process).

The PSIS Institution flat file process generates the following three flat files:

- The PSIS ID (institution description) file lists all unique terms and sessions in the term group table.
- The PSIS IP (institution program) file lists all the plans and programs mapped in the Canadian Program and Plan mapping tables.
- The PSIS IC (institution course) file lists all the courses for which classes have been scheduled during the terms and sessions included in the term group table, for the selected reporting period.

Academic Institution	Enter the institution for which you are running the process.
Report Period	Select the period for which you are running the process. This field prompts against the report period table.
File Path	To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator.
	Note. The file path must have a "\" (backslash symbol) at the end of the path (for example, c:\temp\).

Click Run to run this request and select Create Extract for PSIS Instit. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for PSIS Inst. Click OK.

Running the PSIS Student Process

Access the PSIS Student Process page (Records and Enrollment, Government Reporting Canada, Processes, PSIS Student Process, PSIS Student Process).

Academic Institution	Enter the institution for which you are running the process.
Report Period	Select the period for which you are running the process. This field prompts against the report period table.
File Path	To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator.
	Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).
Student Selection	To define the group of students that you want to process, select one of the following options: <i>Process All Students:</i> Select to generate the extract and flat file for all students in the student list table. <i>Process Selected Students:</i> Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected remains unchanged by the process.

Click Run to run this request and select Create Extract for PSIS Std. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for PSIS Stdnt. Click OK.

Running the USISE Extract Process

This section discusses how to run the USISE extract process and generate a corresponding flat file. Run the USISE extract process if you submit your reporting file directly to the federal government.

Follow these steps to run the USISE extract process and flat file generation for all provinces except Ontario:

1. Access the USISE Extract Process page and run the USISE extract process.
2. Access the USISE Extract Process page and run the USISE flat file process.

Note. For Ontario Fall USISE reporting, where the FALL USIS Enrollment reporting submission includes the OUAC elements, running the extract process is a two-step process.

Follow these steps to run the USISE extract process for Ontario *Fall* USISE reporting:

1. Access the MET Extract Process page and run the MET extract process.
2. Access the OUAC Extract Process page and run the OUAC extract process.
3. Access the OUAC Extract Process page and run the OUAC flat file process.

When you run the OUAC flat file generation process, the system generates two files. One file contains only OUAC elements. The second file is a combined file that contains the USISE, MET, and OUAC elements.

To run the USISE extract process for Ontario USISE reporting *not* in Fall:

1. Access the MET Extract Process page and run the MET extract process.
2. Access the MET Extract Process page and run the MET flat file process.

See Also

[Chapter 51, "\(CAN\) Generating Canadian Government Reports," Running the MET Extract Process, page 1274](#)

[Chapter 51, "\(CAN\) Generating Canadian Government Reports," Running the OUAC Extract Process, page 1276](#)

Page Used to Run the USISE Extract Process

Page Name	Definition Name	Navigation	Usage
USISE Extract Process	RUNCTL_CAN_USE	Records and Enrollment, Government Reporting Canada, Processes, USISE Report Process, USISE Report Process	Define run parameters for the Create Extract for USISE process (SRXTRUSE) and the Create Flat file for USISE process (SRCRFUSE).

Entering USISE Extract Process Parameters

Access the USISE Extract Process page (Records and Enrollment, Government Reporting Canada, Processes, USISE Report Process, USISE Report Process).

Academic Institution	Enter the institution for which you are running the process.
Report Period	Select the period for which you are running the process. This field prompts against the report period table.
File Path	To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator. Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).
Student Selection	To define the group of students that you want to process, select one of the following options: <i>Process All Students:</i> Select to generate the extract and flat file for all students in the student list table. <i>Process Selected Students:</i> Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected remains unchanged by the process.
Data Type	Enter the DATYPE element.
Reporting Type	Enter the INSTYP element.

Click Run to run this request and select Create Extract for USISE. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for USISE. Click OK.

Running the CIS Extract Process

This section discusses how to run the CIS extract process and generate a corresponding flat file. Run the CIS extract process if you submit your reporting file directly to the federal government.

Page Used to Run the CIS Extract Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CIS Extract Process	RUNCTL_CAN_CIS	Records and Enrollment, Government Reporting Canada, Processes, CIS Report Process, CIS Extract Process	Define run parameters for the Create Extract for CIS process (SRXTRCIS) and the Create Flat file for CIS process (SRCRFCIS).

Entering CIS Extract Process Parameters

Access the CIS Extract Process page (Records and Enrollment, Government Reporting Canada, Processes, CIS Report Process, CIS Extract Process).

Academic Institution	Enter the institution for which you are running the process.
Report Period	Select the period for which you are running the process. This field prompts against the report period table.
File Path	To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator. Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).
Student Selection	To define the group of students that you want to process, select one of the following options: <i>Process All Students:</i> Select to generate the extract and flat file for all students in the student list table. <i>Process Selected Students:</i> Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected remains unchanged by the process.

Click Run to run this request and select Create Extract for CIS. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for CIS. Click OK.

Running the MET Extract Process

This section discusses how to run the MET extract process and generate a corresponding flat file.

Page Used to Run the MET Extract Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
MET Extract Process	RUNCTL_CAN_MET	Records and Enrollment, Government Reporting Canada, Processes, MET Report Process, MET Extract Process	Define run parameters for the Create Extract for MET process (SRXTRMET) and the Create Flat file for MET process (SRCRFMET).

Entering MET Extract Process Parameters

Access the MET Extract Process page (Records and Enrollment, Government Reporting Canada, Processes, MET Report Process, MET Extract Process).

Academic Institution	Enter the institution for which you are running the process.
Report Period	Select the period for which you are running the process. This field prompts against the report period table.
File Path	To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator. Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).
Student Selection	To define the group of students that you want to process, select one of the following options: <i>Process All Students:</i> Select to generate the extract and flat file for all students in the student list table. <i>Process Selected Students:</i> Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected remains unchanged by the process.
Data Type	Enter the DATYPE element.
Reporting Type	Enter the INSTYP element.

Click Run to run this request and select Create Extract for MET. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for MET. Click OK.

Running the OUAC Extract Process

In Ontario, running the MET extract process and generating the MET flat file will satisfy most of your reporting.

However, in Ontario, where the FALL USIS Enrollment reporting submission includes the OUAC elements, the process is more complex.

Follow these steps to generate the OUAC report for Ontario Fall USIS Enrollment reporting:

1. Run the MET extract process.
2. Run the OUAC extract process.
3. Run the OUAC flat file generation process.

When you run the flat file process for OUAC, it generates two files. One file contains just the OUAC elements, and the second file is a combined file that contains the USISE, MET, and OUAC elements.

See Also

[Chapter 51, "\(CAN\) Generating Canadian Government Reports," Running the MET Extract Process, page 1274](#)

Page Used to Run the OUAC Extract Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Extract Process	RUNCTL_CAN_OUAC	Records and Enrollment, Government Reporting Canada, Processes, OUAC Report Process, OUAC Extract Process	Define run parameters for the Create Extract for OUAC process (SRXTROUC) and the Create Flat file for OUAC process (SRCRFOUC).

Entering OUAC Extract Process Parameters

Access the OUAC Extract Process page (Records and Enrollment, Government Reporting Canada, Processes, OUAC Report Process, OUAC Extract Process).

Academic Institution

Enter the institution for which you are running the process.

Report Period

Select the period for which you are running the process. This field prompts against the report period table.

File Path

To send the extract output to a file directory, enter a valid directory path that maps to a folder with appropriate read/write permission. If you cannot locate such a folder, consult your system administrator.

Note. The file path must have a "\" (slash symbol) at the end of the path (for example, c:\temp\).

Student Selection

To define the group of students that you want to process, select one of the following options:

Process All Students: Select to generate the extract and flat file for all students in the student list table.

Process Selected Students: Select this option in conjunction with using the Select check box on the Student List Table page. The reports extract process adds data for a new student or replaces reporting data for an existing student. The reporting information for the students who do not have the Select check box selected remains unchanged by the process.

Click Run to run this request and select Create Extract for OUAC. Click OK. After the extract process finishes, return to the Process Scheduler Request page and select Create Flat file for OUAC. Click OK.

Verifying Report Results and Viewing the Audit Reports

After you run the extract process, you can run a number of audit reports to verify that the system generated reporting data for all students in the student list table. This section discusses how to:

- Run the Student Description Audit.
- Run the Student Program Audit.
- Run the Student Course Audit.

Pages Used to Verify Report Results

Page Name	Definition Name	Navigation	Usage
Student Description Audit	RUNCTL_CAN_SDAUD	Records and Enrollment, Government Reporting Canada, Reports, Student Description Audit, Student Description Audit	PSIS: Verify that the system reported all students in the student list table. This report compares the students reported in the SD file to each unique student ID in the CAN_STDNT_LST table and reports the differences.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Student Program Audit	RUNCTL_CAN_SPAUD	Records and Enrollment, Government Reporting Canada, Reports, Student Program Audit, Student Program Audit	PSIS: Verify that there is a corresponding record in the CAN_RPT_ESIS_SP table for all entries in the CAN_STDNT_LST table. Specifically, verify that the career, program, and plan entered for the student in the student list table are valid. If they are not, then the extract program does not produce a record on the SP, SC, and ST files. Invalid students will also be included in the report if the career, program, or plan entered for the student is not valid. CIS, MET, OUAC, USISE: Verify report discrepancies such as an invalid EMPLID, career, program, or plan.
Student Course Audit	RUNCTL_CAN_SCAUD	Records and Enrollment, Government Reporting Canada, Reports, Student Course Audit, Student Course Audit	PSIS: Identify students who are enrolled in duplicate course IDs during the reporting period. If you find duplicate course IDs, you must manually delete one of the classes from the Student Course 1 page, as this condition will fail the Stats Canada audit. See Chapter 51, "(CAN) Generating Canadian Government Reports," Reviewing Report Data, page 1279.

Running the Student Description Audit

Access the Student Description Audit page (Records and Enrollment, Government Reporting Canada, Reports, Student Description Audit, Student Description Audit).

Academic Institution Enter the institution for which you want to audit.

Report Period Select the report period for which you want to audit.

Click Run to run the SRSDAUD report using PeopleSoft Process Scheduler.

Running the Student Program Audit

Access the Student Program Audit page (Records and Enrollment, Government Reporting Canada, Reports, Student Program Audit, Student Program Audit).

Academic Institution	Enter the institution that you want to audit.
Report Type	Select the report type that you want to audit.
Report Period	Select the report period that you want to audit.

Click Run to run the SRSPAUD report using PeopleSoft Process Scheduler.

Running the Student Course Audit

Access the Student Course Audit page (Records and Enrollment, Government Reporting Canada, Reports, Student Course Audit, Student Course Audit).

Academic Institution	Enter the institution that you want to audit.
Report Period	Select the report period that you want to audit.

Click Run to run the SRSCAUD report using PeopleSoft Process Scheduler.

Reviewing Report Data

After you run the extract process, you can view and edit the results by navigating to online pages that display the extract report results. However, you cannot add a new row of information for a student. If you need to add a row of data, you must add another line in the CAN_STDNT_LST table with its associated key field values and rerun the extract report.

Pages Used to Review Report Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PSIS Institution Description	CAN_RPT_ESIS_ID	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Institution Description, PSIS Institution Description	PSIS: Review institution term data.

Page Name	Definition Name	Navigation	Usage
Institution Program 1	CAN_RPT_ESIS_IP	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Institution Program, Institution Program 1	PSIS: Review institution and program code data.
Institution Program 2	CAN_RPT_ESIS_IP3	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Institution Program, Institution Program 2	PSIS: Review additional institution and program code data.
PSIS Institution Course	CAN_RPT_ESIS_IC	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Institution Course, PSIS Institution Course	PSIS: Review additional institution and program code data.
Student Descr 1 (student description 1)	CAN_RPT_ESIS_SD	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Description, Student Descr 1	PSIS: Review descriptive data for a student.
Student Descr 2 (student description 2)	CAN_RPT_ESIS_SD2	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Description, Student Descr 2	PSIS: Review additional descriptive data for a student.
Student Descr 3 (student description 3)	CAN_RPT_ESIS_SD1	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Description, Student Descr 3	PSIS: Review additional descriptive data for a student.
Student Descr 4 (student description 4)	CAN_RPT_ESIS_SD3	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Description, Student Descr 4	PSIS: Review additional descriptive data for a student.
Student Descr 5 (student description 5)	CAN_RPT_ESIS_SD6	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Description, Student Descr 5	PSIS: Review additional descriptive data for a student.
Student Program 1	CAN_RPT_ESIS_SP	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Program, Student Program 1	PSIS: Review program related data for a student.

Page Name	Definition Name	Navigation	Usage
Student Program 2	CAN_RPT_ESIS_SP2	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Program, Student Program 2	PSIS: Review additional program related data for a student.
Student Program 3	CAN_RPT_ESIS_SP3	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Program, Student Program 3	PSIS: Review additional program related data for a student.
Student Program 4	CAN_RPT_ESIS_SP4	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Program, Student Program 4	PSIS: Review additional program related data for a student.
Student Course 1	CAN_RPT_ESIS_SC	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Course, Student Course 1	PSIS: Review course related data for a student.
Student Course 2	CAN_RPT_ESIS_SC2	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Course, Student Course 2	PSIS: Review additional course related data for a student.
Student Course 3	CAN_RPT_ESIS_SC3	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Course, Student Course 3	PSIS: Review additional course related data for a student.
Student Trans Cred 1	CAN_RPT_ESIS_ST	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Transfer Credits, Student Trans Cred 1	PSIS: Review receiving institution transfer coursework for a student.
Student Trans Cred 2	CAN_RPT_ESIS_ST2	Records and Enrollment, Government Reporting Canada, Suspense Tables, PSIS Student Transfer Credits, Student Trans Cred 2	PSIS: Review external institution transfer coursework for a student.

Page Name	Definition Name	Navigation	Usage
USISE Elements 1	CAN_USISE	Records and Enrollment, Government Reporting Canada, Suspense Tables, USISE Elements, USISE Elements 1	USISE: Review USISE elements data for a student.
USISE Elements 2	CAN_USISE_2	Records and Enrollment, Government Reporting Canada, Suspense Tables, USISE Elements, USISE Elements 2	USISE: Review additional USISE elements data for a student.
CIS Elements 1	CAN_CIS	Records and Enrollment, Government Reporting Canada, Suspense Tables, CIS Elements, CIS Elements 1	CIS: Review CIS elements for a student.
CIS Elements 2	CAN_CIS2	Records and Enrollment, Government Reporting Canada, Suspense Tables, CIS Elements, CIS Elements 2	CIS: Review additional CIS elements for a student.
CIS Elements 3	CAN_CIS1	Records and Enrollment, Government Reporting Canada, Suspense Tables, CIS Elements, CIS Elements 3	CIS: Review additional CIS elements for a student.
MET Elements 1	CAN_USMET	Records and Enrollment, Government Reporting Canada, Suspense Tables, MET Elements, MET Elements 1	MET: Review MET elements for a student.
MET Elements 2	CAN_USMET_2	Records and Enrollment, Government Reporting Canada, Suspense Tables, MET Elements, MET Elements 2	MET: Review additional MET elements for a student.
MET Elements 3	CAN_USMET1	Records and Enrollment, Government Reporting Canada, Suspense Tables, MET Elements, MET Elements 3	MET: Review additional MET elements for a student.
OUAC Elements	CAN_OUAC	Records and Enrollment, Government Reporting Canada, Suspense Tables, OUAC Elements, OUAC Elements	OUAC: Review OUAC Elements for a student.

(Optional) Correcting Report Data

Before you send your report to the government, you may want to correct the reporting data. You can correct reporting data in one of two ways:

1. PeopleSoft source pages (student data or setup data).
2. Report data pages (for example, the Student Course 1 page).

When you rerun the report, the system reprocesses any changes that you make using method one, as long as the effective date of the change is less than or equal to the value in the Report Due Date field on the Can Report Period page. This implies that you must rerun the extract program. If you do not enter a date in the Report Due Date field, the system references the system date to determine what to include in the report.

Note. You will make most corrections using method number one. You should correct data using method two only if you are certain that you will not be required to rerun the reports extract program. The extract program will overwrite any corrections you make in method two when you rerun the process. Changes made through method two are best used for updating the flat file.

See Also

Chapter 51, "(CAN) Generating Canadian Government Reports," page 1267

Archiving Extract Table Data

After you submit the flat files to the government, you can archive the data in the reports extract archive tables. This process takes the data in the extract tables and saves it to archive tables. The report date acts as an effective date; so you can store multiple report periods in the applicable archive tables. After you run the archive process for a particular report and report period, you cannot run the archive process again. If you attempt to do so, the archive program writes a message in the log file.

The system archives your data in the following tables:

- CAN_ARC_ESIS_IC
- CAN_ARC_ESIS_ID
- CAN_ARC_ESIS_IP
- CAN_ARC_ESIS_SC
- CAN_ARC_ESIS_SD
- CAN_ARC_ESIS_SP
- CAN_ARC_ESIS_ST
- CAN_ARCH_USISE

- CAN_ARCH_USMET
- CAN_ARCH_CIS
- CAN_ARCH_OUAC

Page Used to Archive Extract Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Archive Extract File	RUNCTL_CAN_ARCHIVE	Records and Enrollment, Government Reporting Canada, Processes, Archive Extract File, Archive Extract File	All: Define run parameters for the Canada Report Archive process (SRARCH).

Running the Archive Process

Access the Archive Extract File page (Records and Enrollment, Government Reporting Canada, Processes, Archive Extract File, Archive Extract File).

- Academic Institution** Enter the institution that you want to archive.
- Report Type** Enter the report type that you want to archive.
- Report Period** Enter the report period that you want to archive.

Click Run to run the SRARCH report using PeopleSoft Process Scheduler.

Chapter 52

(GBR) Managing HESA Returns

This chapter provides an overview of the Higher Education Statistics Agency (HESA) return process and discusses how to:

- Import and map HESA codes.
- Set up a HESA return.
- Set up and enter data for HESA reporting.
- Prepare for generating DLHE return.
- Generate a HESA return and create a return file.

Understanding HESA Returns

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

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

See <http://www.hesa.ac.uk>

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

To generate returns for submission:

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

Plan how you want the system to derive the return field values. We recommend that you review the return type specification that is available from the HESA website to review the field descriptions, validations, and the valid field values. Refer to the (GBR) HESA Field Derivation appendix in this PeopleBook to understand how the system derives the fields.

Importing and Mapping HESA Codes

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

To import HESA codes:

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

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

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

This section discusses how to:

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

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

Pages Used to Import and Map HESA Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import HESA Codes	SSR_HE_RUNCNTL	Records and Enrollment, HESA Reporting, Codes and Mappings, Import HESA Codes	Import HESA codes from the XML Schema Definition (XSD) file. The code list XSD file is available from the HESA website.
Codes	SSR_HE_CODES	Records and Enrollment, HESA Reporting, Codes and Mappings, Codes	View the codes that you have imported from the code list XSD file. If required, add new codes for fields.
Ethnicity	SCC_HE_ETHNIC	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Ethnicity	Map Campus Solutions regulatory region and ethnic group codes to the HESA ethnicity codes.
Campus	SSR_HE_CAMPUS	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Campus	Map Campus Solutions campus codes to the HESA campus and Institution's Own Campus codes.
Marital Status	SCC_HE_MARITAL	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Marital Status	Map Campus Solutions marital status codes to the HESA marital status codes.
Religion	SCC_HE_RELIGION	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Religion	Map Campus Solutions religious preference codes to the HESA religion codes.
Qualification	SSR_HE_QUALIFIC	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Qualification	Map Campus Solutions degree codes to the HESA qualification codes.
Nationality	SCC_HE_NATIONALITY	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality	Map Campus Solutions country codes to the HESA nationality codes.

Page Name	Definition Name	Navigation	Usage
Fee Eligibility	SSR_HE_FEE_ELIG	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Fee Eligibility	Map Campus Solutions residency codes to the HESA fee eligibility codes.
Mode of Study	SSR_HE_MODE_STD	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Mode of Study	Map Campus Solutions academic load codes to the HESA mode of study codes.
Classification	SSR_HE_CLASSIFI	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Classification	Map Campus Solutions honors type and honors codes to the HESA classification codes.
Disability	SCC_HE_DISABILITY	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability	Map Campus Solutions type of impairment and support services request codes to the HESA disability codes. Note that the system creates disability records as part of Universities & Colleges Admissions Service (UCAS) processing. For information on how to assign impairment codes to students and specify whether or not support services have been requested, refer to <i>PeopleSoft Campus Community Fundamentals 9.0 PeopleBook</i>, "Managing Health Information", (AUS) Identifying Impairment and Support Services
Module Outcome	SSR_HE_MODULE	Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Module Outcome	Map Campus Solutions grading scheme, grading basis, grade input, and grade category codes to the HESA module outcome codes.

Page Name	Definition Name	Navigation	Usage
Entry Qualification Mapping	SSR_HE_QOE_MAP	Records and Enrollment, HESA Reporting, Codes and Mappings, Entry Qualification Mapping	Map a qualification type to a list of valid grades for that qualification. If grades are not mapped to a particular qualification type, then all the grades are available for a qualification type on the Entry Profile Data page. If you do this mapping, the Entry Profile page displays only the mapped grades for a type.

Importing HESA Codes

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

Import HESA Codes page

Add Attachment

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

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

XSD File Path

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

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

Note. The import process does not import the MODCOUNT and OUTPOSTCD codes because these codes are not required by the system. The log file for the process mentions that MODCOUNT and OUTPOSTCD codes are not imported.

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

Searching for the Imported HESA Codes

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

Codes

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Field: begins with

ACCESS

Code: begins with

☐ Case Sensitive

Search

Clear

Basic Search

 Save Search Criteria

Search Results

View AllFirst1-2 of 2Last

Field	Code	Description
ACCESS	1	Entered HE via the SWAP
ACCESS	2	Entered HE via other access pr

Codes search page

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

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

Codes

Field: ACCESS Access programmes

Code: 1

Code

Description: Entered HE via the SWAP

Long Description: Entered HE via the SWAP

☒ Imported ☒ Active

Codes page

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

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

Mapping Ethnic Codes

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

Ethnicity

Campus

Marital Status

Religion

Qualification

Nationality

Academic Institution:

PSUNV

PeopleSoft University

Mappings

Customize | Find | View All | 

First

1 of 1

 Last

	*Regulatory Region	Description	*Ethnic Group	Description	*HESA Ethnicity	Description	Active		
1	GBR 	United Kingdom	WHITE 	White	10 	White			

Ethnicity page

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

Mapping Campus Codes

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

Ethnicity	Campus	Marital Status	Religion	Qualification	Nationality	
Academic Institution: PSUNV PeopleSoft University						
Mappings						
Customize Find View All First 1 of 1 Last						
*Campus	Description	*HESA Campus ID	HESA Institutions Own Campus	Active		
MAIN	Main Hacienda Campus	C	8	☒	+	-

Campus page

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

Mapping Marital Status Codes

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

Ethnicity	Campus	Marital Status	Religion	Qualification	Nationality	
Academic Institution: PSUNV PeopleSoft University						
Mappings						
Customize Find View All First 1-5 of 5 Last						
*Marital Status	Description	*HESA Marital Status	Description	Active		
Divorced	Divorced	04	Divorced	☒	+	-
Separated	Separated	03	Separated (but still legally m	☒	+	-
Married	Married	02	Married	☒	+	-
Single	Single	01	Single (never married)	☒	+	-
Widowed	Widowed	05	Widowed	☒	+	-

Marital Status page

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

Mapping Religion Codes

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

Ethnicity	Campus	Marital Status	Religion	Qualification	Nationality	

Academic Institution: PSUNV PeopleSoft University

Mappings						Customize	Find	View All	First	1 of 1	Last
*Religious Preference	Description	*HESA Religion	Description	Active							
HNDU	Hindu	3	Other	☒							

Religion page

Map the Campus Solutions religion codes to the HESA religion codes. The system uses this mapping to derive the EntryProfile.RELIGION field value.

Mapping Qualification Codes

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

Ethnicity	Campus	Marital Status	Religion	Qualification	Nationality	

Academic Institution: PSUNV PeopleSoft University

Mappings						Customize	Find	View All	First	1 of 1	Last
*Degree	Description	*HESA Qualification	Description	Active							
CERT	Certificate	C20	Cert of Higher Education	☒							

Qualification page

Map the Campus Solutions degree codes to the HESA qualification codes. The system uses this mapping to derive the Qualifications Awarded.QUAL field value.

Mapping Nationality Codes

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

Ethnicity	Campus	Marital Status	Religion	Qualification	Nationality	Fee Eligibility	

Academic Institution: PSUNV PeopleSoft University

Mappings								Customize	Find	View All	First	1-2 of 2	Last
*Country	Description	*HESA Nationality	Description	HESA Domicile	Description	Active							
CYP	Cyprus	XA	Cyprus (European Union)	XA	Cyprus (European Union)	☒							
REU	Reunion	FR	France (includes Corsica)			☒							

Nationality page

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

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

HESA Nationality

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

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

HESA Domicile

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

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

See Nationality (NATION) and Domicile (DOMICILE) sections in the (GBR) HESA Field Derivation appendix of this PeopleBook.

Mapping Fee Eligibility Codes

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

*Residency	Description	*HESA Fee Eligibility	Description	Active		
IC	In City	1	Eligible to pay home fees	☒	+	-
INTL	International Student	2	Not eligible to pay home fees	☒	+	-

Fee Eligibility page

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

Mapping Mode of Study Codes

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

Fee EligibilityMode of StudyClassificationDisabilityModule Outcome						
Academic Institution: PSUNV PeopleSoft University						
MappingsCustomizeFindView AllFirst1-2 of 2Last						
*Academic Load	Description	*HESA Mode of Study	Description	Active		
Full-Time	Full-Time	01	Full-time according to funding	☒	+	-
Part-Time	Part-Time	31	Part-time	☒	+	-

Mode of Study page

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

Mapping Classification Codes

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

Fee EligibilityMode of StudyClassificationDisabilityModule Outcome						
Academic Institution: PSUNV PeopleSoft University						
MappingsCustomizeFindView AllFirst1 of 1Last						
*Honors Type	Description	*Honors Code	Description	*HESA Classification	Description	Active
DH	Degree Honors	HON	Honors	01	First class honours	☒

Classification page

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

Mapping Disability Codes

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

[New Window](#)

[Nationality](#)
[Fee Eligibility](#)
[Mode of Study](#)
[Classification](#)
[Disability](#)
[Module Outcome](#)

Academic Institution: PSUNV PeopleSoft University

Disability Mappings						Customize	Find	View All	First	1-6 of 6	Last
*Type of Impairment	Description	*HESA Disability	Description	Active							
Hearing	Hearing Disability	03	Deaf/hearing impairment	☒							
Learning	Learning Disability	11	A specific learning difficulty	☒							
Mobility	Mobility Disability	04	Wheelchair user/mobility diffi	☒							
Vision	Vision Disability	02	Blind/partially sighted	☒							
Medical	Medical Disability	07	An unseen disability, e.g. dia	☒							
Other	Other Disability	96	A disability not listed above	☒							

Disability Allowance Mappings						Customize	Find	View All	First	1 of 1	Last
*Support Services Request	Description	*HESA Disability Allowance	Description	Active							
Claimed	Support Services Claimed	4	In receipt of Disabled Student	☒							

Disability page

Disability Mapping

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

Disability Allowance Mappings

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

Mapping Module Outcome Codes

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

Academic Institution: PSUNV PeopleSoft University

Grading Scheme: UGD Undergraduate Grading Scheme

*Grading Basis: Pass/Not Pass

*Grade Input	*Grade Category	*HESA Module Outcome	Description	Active
P	PASS	1	Completion - full credit	☒

Module Outcome page

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

Mapping Entry Qualification

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

Entry Qualification Mapping

Academic Institution: PSUNV PeopleSoft University

Qualification Type: A GCE A Level

*Qualification Grade	Active
1 16	☒
2 17	☒

Entry Qualification Mapping page

An institution can only return specific Grades (QUALGRADE) for a Qualification Type to HESA. If an invalid Grade is returned, then validation errors will occur at HESA. Use the Entry Qualification Mapping page to define which Grade values are appropriate for a particular Qualification Type. The system then uses this mapping to ensure that only valid Grade values are entered for the selected Qualification Type on the Entry Profile Data page. The Import Applicant Data process also uses this mapping when importing ivStarJ records to report invalid grade values.

Setting Up a HESA Return

This section discusses how to:

- Set up a HESA return.
- Set up HESA fields.
- Set up HESA types.
- Set up HESA action reasons.
- Configure HESA.
- Generate HUSID during registration or enrollment.

Pages Used to Set Up a HESA Return

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Reporting Periods	SSR_HE_REP_PERIODS	Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods	View or create a reporting period. Reporting periods from 2000 to 2010 are delivered with your system.
Returns	SSR_HE_RETURNS	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns	View or create a return type. The STUDENT, OFFSHORE and ITT return types are delivered with your system.
Entities	SSR_HE_ENTITIES	Records and Enrollment, HESA Reporting, HESA Returns Setup, Entities	View or create an entity for a return type. The entities for Student, Offshore and ITT returns are delivered with your system.
Fields	SSR_HE_FIELDS	Records and Enrollment, HESA Reporting, HESA Returns Setup, Fields	View or create return fields. For the Student return and the Offshore return, the HESA fields are delivered with your system.
HESA Returns	SSR_HE_HESA_RETURN	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Returns	Create a return for a reporting period. To create a return, you can copy return setup data (such as the return fields) from another return you previously created.

Page Name	Definition Name	Navigation	Usage
HESA Fields	SSR_HE_HESA_FIELDS	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Fields	Add, edit, or view HESA fields in a return. If required, specify default and constant values for the HESA return fields.
HESA Types	SSR_HE_HESA_TYPES	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Types	For the Student return, map HESA fields to the Campus Solutions name, address and external ID types. The system uses this mapping to derive HESA return field values. Also, define the program statuses that the system uses to determine which Instances records to include in the return.
HESA Action Reasons	SSR_HE_HESA_ACTN	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Action Reasons	For the Student return, map HESA field codes to the Campus Solutions Program Action and Action Reason values. The system uses this mapping to derive HESA return field values.
HESA Configuration	SSR_HE_CONFIG	Records and Enrollment, HESA Reporting, HESA Returns Setup, HESA Configuration	Configure the system for Create Extract and Create HUSID processing. Control validation for DLHE survey.
Create HUSID	SSR_HE_CRTHUSID	Records and Enrollment, HESA Reporting, HESA Returns Setup, Create HUSID	Run the process to generate HUSIDs for students during the registration or enrollment period.

Setting Up a HESA Return

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

HESA ReturnsHESA FieldsHESA TypesHESA Action Reasons

Academic Institution:PSUNV PeopleSoft University

Return Name:ST0910

Return Type:STUDENTStudent Return

'Reporting Period':2009/102009/2010 Reporting Period

Country:ENGEngland

INSTAPP:0

☐ Enable Sub-Plan Reporting

☐ Include FE

☒ Active

Program Statuses

CustomizeFindView AllFirst1 of 1Last

	Academic Program Status	Description		
1	Active in Program	Active in Program	+	-

Research Supervisor Roles

CustomizeFindView AllFirst1 of 1Last

	Advisor Role	Description		
1	Advisor	Advisor	+	-

HESA Returns page

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

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

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

HESA Returns

Academic Institution: PSUNV PeopleSoft University

Return Name: New Return

*Return Type:

*Reporting Period:

Country:

INSTAPP:

Create Fields

☐ Enable Sub-Plan Reporting
☐ Include FE
☒ Active

Copy Return Setup Data From

*Return Name:

*Reporting Period:

Skip Copy

Copy

Research Supervisor Roles

Customize | Find | View All | | First 1 of 1 Last

	Advisor Role	Description		
1				

Survey Details

Customize | Find | View All | | First 1 of 1 Last

	*Survey	Description	Qualifying Start Date	Qualifying End Date	*Census Date	*Survey Start Date	*Survey End Date		
1									

Survey Statuses

Customize | Find | View All | | First 1 of 1 Last

	Survey Status	Description		
1				

Example of HESA Returns page with the Copy Return Setup Data From group box

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

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

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

The Create Fields button is available only when you click the Skip Copy button. The following example shows the HESA Returns page when you click the Skip Copy button:

HESA ReturnsHESA FieldsHESA TypesHESA Action Reasons

Academic Institution:PSUNV PeopleSoft University

Return Name:New Return

*Return Type:

*Reporting Period:

Country:

INSTAPP:

Create Fields

☐ Enable Sub-Plan Reporting

☐ Include FE

☒ Active

Program Statuses

CustomizeFindView All1 of 1FirstLast

	*Academic Program Status	Description		
1			+	-

Research Supervisor Roles

CustomizeFindView All1 of 1FirstLast

	Advisor Role	Description		
1			+	-

Survey Details

CustomizeFindView All1 of 1FirstLast

	*Survey	Description	Qualifying Start Date	Qualifying End Date	*Census Date	*Survey Start Date	*Survey End Date		
1			31	31	31	31	31	+	-

Survey Statuses

CustomizeFindView All1 of 1FirstLast

	Survey Status	Description		
1			+	-

Example of the HESA Returns page after you click the Skip Copy button

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

Return Type

Select the delivered *STUDENT* ,*OFFSHORE*,*DLHE*, or *ITT* return type value.

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

Note.

When you select *OFFSHORE*, the HESA Types and HESA Action Reasons tabs disappear. These two tabs are required only for a Student return.

Reporting Period

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

Country	Select a country code that the system uses to determine which fields to include in the return. Values for this field are delivered with your system as translate values. Values are <i>England,Northern Ireland,Scotland,</i> and <i>Wales</i> . This field is not applicable for the Aggregate Offshore return.
INSTAPP	Enter a value that you want the system to return in the Institution.INSTAPP field of the return. This field is not applicable for the Aggregate Offshore and ITT returns.
Enable Sub-Plan Reporting	Select if you want to enter the reporting data in the Sub-Plan HESA and the Sub-Plan Offering/Year HESA pages. Selecting this check box enables the system to use the entered subplan level data to generate the HESA return.
Include FE (Include further education)	Select to have the system derive fields relevant to further education (FE) students. This field is not applicable for the Aggregate Offshore return.
Active	Clear this check box if you want to prevent old test returns from being displayed in the search results.

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

Program Statuses

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

See (GBR) HESA Field Derivation appendix in this PeopleBook for more information.

Research Supervisor Roles

This region is applicable for only the Student return.

Select Advisor Role values that the system uses to determine which Student Advisor records to consider when creating RAE Data entities in the Student return.

Survey Details

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

Survey	Select the survey translate values, either <i>1</i> for the April survey or <i>2</i> for the January survey.
Qualifying Start Date	Select the start date to be used when identifying students who qualify for the survey. If the Survey value is April, the value defaults to the reporting period start date. If the Survey value is January, the value defaults to 01-JAN-YYYY where the year value is the year value of the reporting period end date.

Qualifying End Date	Select the end date to be used when identifying students who qualify for the survey. If the Survey value is April, the value defaults to 31-Dec-YYYY, where the YYYY value is the year of the reporting period start date. If the Survey value is January, the value defaults to the reporting period end date.
Census Date	Select the census date for the survey. This system also displays the date to the student on the Survey questionnaire
Survey Start Date	Select the date when the survey is available for completion by the student.
Survey End Date	Select the date when the survey is no longer available for completion by the student.

Survey Statuses

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

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

Setting Up HESA Fields

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

HESA Returns
HESA Fields
HESA Types
HESA Action Reasons

Academic Institution: PSUNV PeopleSoft University
Return Name: AT Return
Return Type: STUDENT

Entities Find | View All First 6 of 13 Last

Entity: MODULE **Module**

Fields Customize | Find | View All First 1-10 of 10 Last

Field	Description	Constant Value	Default Value		
CRDTPTS	Credit value of module		999	+	-
CRDTSCM	Credit transfer scheme	9		+	-
FTE	Module FTE			+	-
LANGPCNT	Percentage of module taught in			+	-
LEVLPTS	Level of credit points			+	-
MODID	Module identifier			+	-
MODLANG	Module available in a Celtic I			+	-
MTITLE	Module title			+	-
PCOLAB	Percentage not taught by this			+	-
TINST	Other institution providing te			+	-

HESA Fields page

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

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

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

Setting Up HESA Types

The HESA Types page is not applicable for the Aggregate Offshore return.

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

HESA Returns
HESA Fields
HESA Types
HESA Action Reasons

Academic Institution: PSUNV PeopleSoft University
Return Name: NGS08091

Name Types		Customize Find View All 		First	1-3 of 3	Last
*Field	Description	*Name Type	Description			
FNAMES 	Forenames	PRI 	Primary			 
SNAME16 	Family name on 16th birthday	FR2 	Former2			 
SURNAME 	Family name	PRI 	Primary			 

Address Types		Customize Find View All 		First	1-2 of 2	Last
*Field	Description	*Address Type	Description			
POSTCODE 	Postcode	HOME 	Home			 
TTPCODE 	Term-time postcode	CAMP 	Campus			 

External ID Types		Customize Find View All 		First	1-3 of 7	Last
*Field	Description	External ID Type	Description			
DHREGREF 	Regulatory body reference numb	DHR 	Dept Health Regn (DHREGREF)			 
HUSID 	HESA unique student identifier	HE 	HESA Unique Student ID (HUSID)			 
RCSTDID 	Research council student ident	RCS 	Research Council ID (RCSTDID)			 

HESA Types page

The system uses the Name Types mapping to derive the following fields for both ITT and Student returns:

- Student.FNAMES
- Student.SNAME16
- Student.SURNAME

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

- EntryProfile.POSTCODE
- Student.TTPCODE

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

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

- Instance.DHREGREF
- Student.HUSID

- Instance.RCSTDID
- Student.SCN
- Instance.TREFNO
- Student.UCASPERSID
- Student.ULN

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

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

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing External System Data About an Individual or Organization."

Setting Up HESA Action Reasons

The HESA Action Reasons page is not applicable for the Aggregate Offshore return.

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

HESA ReturnsHESA FieldsHESA TypesHESA Action Reasons

Academic Institution: PSUNV PeopleSoft University

Return Name: AT Return

Phd Submission Action Reason Mapping

Customize | Find | View All | 1 of 1 | First | Last

*Program Action	Description	Action Reason	Description	Active		
Completion	Completion of Program	SUBM	Phd Submission	☒	+	-

Reason for Ending Instance Mapping

Customize | Find | View All | 1 of 1 | First | Last

Program Action

Reason for Ending Instance

*Program Action	Description	Action Reason	Description		
Discontin	Discontinuation	DEAT	Death	+	-

Change of Mode Mapping

Customize | Find | View All | 1 of 1 | First | Last

Program Action

Mode of Study

*Program Action	Description	Action Reason	Description		
Prog Chg	Program Change	CCH	Course Change	+	-

Suspension of Active Studies Mapping

Customize | Find | View All | 1 of 1 | First | Last

Program Action

Suspension of Studies

*Program Action	Description	Action Reason	Description		
Suspension	Suspension	SUSP	Studies Suspended	+	-

HESA Action Reasons page (with the Program Action tabs selected) (1 of 2)

HESA Returns	HESA Fields	HESA Types	HESA Action Reasons
Academic Institution: PSUNV PeopleSoft University Return Name: AT Return			
Phd Submission Action Reason Mapping Customize Find View All First 1 of 1 Last			
*Program Action	Description	Action Reason	Description
Completion	Completion of Program	SUBM	Phd Submission
			Active
			+
			-
Reason for Ending Instance Mapping Customize Find View All First 1 of 1 Last			
Program Action	Reason for Ending Instance		
*HESA Reason for Ending Instance	Description	Active	
05	Death	+	
		-	
Change of Mode Mapping Customize Find View All First 1 of 1 Last			
Program Action	Mode of Study		
*HESA Mode of Study	Description	*HESA Mode Direction	Description
63	Dormant - previously full-time	AI	Active to Inactive
			Active
			+
			-
Suspension of Active Studies Mapping Customize Find View All First 1 of 1 Last			
Program Action	Suspension of Studies		
*HESA Suspension of Studies	Description	Active	
1	Student has suspended studies	+	
		-	

HESA Action Reasons page (with the Reason for Ending Instance, Mode of Study, and Suspension of Studies tabs selected) (2 of 2)

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

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

Phd Submission Action Reason Mapping

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

Reason for Ending Instance Mapping

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

The system uses this mapping to derive Student return's Instance.ENDDATE and Instance.RSNEND fields, and ITT return's Student.ENDDATE and Student.RSNEND fields.

Change of Mode Mapping

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

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

Suspension of Active Studies Mapping

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

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

Configuring HESA

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

HESA Configuration

Academic Institution: PSGBR PeopleSoft University UK

Institution Details

***UKPRN:**

HUSID Generation

***HUSID Sequence Number:**

***External System:**  HESA Unique Student ID (HUSID)

DLHE Survey

☒ Allow incomplete submission

Grading Basis Inclusion

[Personalize](#) | [Find](#) | [View All](#) |  | [First](#)  1 of 1  [Last](#)

#	*Grading Basis	Formal Description	Extract	FTE	Year of Student	
1	GRD 	Graded	☒	☒	☒	+ -

Repeat Code Exclusion

[Personalize](#) | [Find](#) | [View All](#) |  | [First](#)  1 of 1  [Last](#)

#	*Repeat Code	Description	Extract	FTE	Year of Student	
1	REXC 	Retake - Excluded	☒	☒	☒	+ -

HESA Configuration page

You must use this page to configure HUSID before running the Create HUSID process or the Create Extract process.

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

HUSID Sequence Number Enter the starting number for the system-assigned 6-digit number included in the 13-digit HUSID number. For each student without an existing HUSID, the Create HUSID process or the Create Extract process assigns a unique 13-digit HUSID value in the return.

External System Select the External ID Type that the Create HUSID or Create Extract process uses for HUSID value.

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

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing External System Data About an Individual or Organization."

Allow incomplete submission

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

If the Allow Incomplete Submission check box is not selected and the student clicks the Submit button on Section F of the Enter Survey self-service page:

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

If the Allow Incomplete Submission check box is selected and the student clicks the Submit button:

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

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

Grading Basis Inclusion and Repeat Code Exclusion

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

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

See [Chapter 12, "Setting Up Grading," page 287](#).

See [Chapter 5, "Setting Up Repeat Checking," page 47](#).

Generating HUSID During Registration or Enrollment

Access the Create HUSID page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Create HUSID).

Create HUSID

Run Control ID: PSUNV [Report Manager](#) [Process Monitor](#) [Run](#)

'Academic Institution: PSUNV PeopleSoft University

Academic Career:

Academic Program:

Start Date:

Student Override

☒ Student Override [Clear Data](#)

[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

	EmplID	Name
1	AA0003	Brown, Allison

Create HUSID page

Run the Create HUSID process if you want to create HUSIDs when registering or enrolling new students and before running the Create Extract process.

Start Date

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

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

- The first two digits of HUSID represent the year the student entered the Institution (for example, 08 for 2008). The entry year is determined as the final two digits of the year element of the effective date of the selected Student Program record.

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

Setting Up and Entering Data for HESA Reporting

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

- Set up data capture rules.
- Enter HESA data for an academic program.
- Enter HESA data for a program offering and program year.
- Enter HESA data for an academic plan.
- Enter HESA data for a plan offering and plan year.
- Enter HESA data for a subplan.
- Enter HESA data for a subplan offering and subplan year.
- Create HESA modules.
- Enter HESA data for a module.
- Enter HESA data for a dummy module.
- Create HESA Instance and Person HESA Data Records for students.
- Enter HESA data for a person.
- Enter HESA Instance data for a student.
- Enter HESA Entry Profile data for a student.
- Calculate Year of Student values for students.
- Calculate Full-Time Equivalence for students.
- Enter HESA advisor data for a student.

- Enter DEGEST value.
- Enter DEGTYPE value.

Understanding Setting Up and Entering Data for HESA Reporting

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

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

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

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

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

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

4. Plan HESA Data page (Plan level)

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

6. Program HESA Data page (Program level)

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

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

The pages and group boxes for other levels include:

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

You can define field values at the Plan Offering level when you want to report different field values for different offerings. For example, the expected length of study (Instance.SPLENGTH) for students studying a full-time offering will typically be different from that of a part-time offering. In this case, you can define different values at plan offering level for each offering.

- Sub-Plan Offering HESA Data group box in the Sub-Plan Offering/Year HESA page (Subplan offering level)
- Module HESA Data and HESA Dummy Module Data pages (Module level). Module level is equivalent to the Course Offering level. The system uses the field values entered at the Module level to create the Module, Module Subject, and Student On Module entities.
- Person HESA Data page (Student level).

The system uses the field values entered at the Student level to create the Student entity.

- Advisor HESA Data page (Advisor level)

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

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

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

You can decide at which levels the system should capture data for HESA reporting. For example, you can decide not to enter a Course.CLSDCRS value in the Program HESA Data page but enter it in the Plan HESA Data page. You can decide to enter the Instance.FEEELIG value in the HESA Instance page for each student rather than storing the Instance.FEEELIG data in the Program HESA Data page. Refer to the (GBR) HESA Field Derivation appendix in this PeopleBook to understand how the system derives field values at each level.

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

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

Note. The (GBR) HESA Field Derivation appendix describes the delivered functionality for deriving the HESA return fields. You can use the Institution Data Capture page to determine at which level the system should derive the fields.

Other than the various data capture levels, the system may use a constant or a default value set up on the HESA Fields page based on the derivation logic.

Deriving FTE Calculation Type and FTE Load

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

Pages Used to Set Up and Enter Data for HESA Reporting

Page Name	Definition Name	Navigation	Usage
Institution Data Capture	SSR_HE_INST_DATA	Records and Enrollment, HESA Reporting, HESA Returns Setup, Data Capture Setup	Create and maintain the rules to capture HESA data in the system. Use this page to control which fields are available on the various HESA data capture pages.
Program HESA Data	SSR_HE_PROG	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program HESA Data	Enter or modify values that the system can use for creating Student return's Course, Course Subject, and Instance entity data at the program level. Indicate the HESA subjects that the system can use for creating ITT return's Course Subject entity data (SBJCA field) at the program level.
Program Offering/Year HESA	SSR_HE_PROG_OFFRYR	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the program offering and program year levels.
Plan HESA Data	SSR_HE_PLAN	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data	Enter or modify values that the system can use for creating the following at the plan level: Student return's Course, Course Subject, and Instance entity data. Aggregate Offshore return's Provision entity data. ITT return's Course Subject entity data (SBJCA field).

Page Name	Definition Name	Navigation	Usage
Plan Offering/Year HESA	SSR_HE_PLAN_OFFRYR	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the plan offering and plan year levels.
Sub-Plan HESA	SSR_HE_SUBPLAN	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan HESA	Enter or modify values that the system can use for creating the following at the subplan level: Student return's Course, Course Subject, and Instance entity data. Aggregate Offshore return's Provision entity data. ITT return's Course Subject entity data (SBJCA field).
Sub-Plan Offering/Year HESA	SSR_HE_SPLN_OFFRYR	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan Offering/Year HESA	Enter or modify values that the system can use for creating Student return's Instance entity data at the subplan offering and subplan year levels.
Create HESA Module Data	SSR_HE_CREATECRSE	Records and Enrollment, HESA Reporting, HESA Returns Setup, Create Module	Create HESA module data records for an academic institution.
HESA Module Data	SSR_HE_CRSE	Curriculum Management, Course Catalog, HESA Module Details	Update a HESA module data record that the Create HESA Module Data created or manually create a HESA Module Data record. Enter or modify values that the system can use for creating Student return's Module, ModuleSubject, and Student on Module entity data at the module level.
HESA Dummy Module Data	SSR_HE_CRSE_DUMMY	Curriculum Management, Course Catalog, HESA Dummy Module Details	Manually create a HESA dummy module data record. Enter HESA field and Module Subject values for the dummy Module record.

Page Name	Definition Name	Navigation	Usage
Create HESA Instance	SSR_HE_CREATEHESA	Records and Enrollment, HESA Reporting, HESA Returns Setup, Create Instance	Run the process to create HESA instance and Person HESA Data records for new matriculated students. You can specify whether you want to create records for matriculated students of a particular academic institution, program, plan, or subplan. In addition, you can specify a date to have the process generate records of students who matriculated on or after the specified date.
Person HESA Data	SCC_HE_PERSON	Campus Community, Personal Information, Add/Update a Person, Person HESA Data	Update a Person HESA Data record that the Create HESA Instance created or manually create a Person HESA Data record. View, enter or modify values for a person that the system can use for creating Student entity data at the student level (for the Student and ITT returns).
HESA Instance Data	SSR_HE_INSTANCE	Records and Enrollment, Career and Program Information, HESA Instance Details, HESA Instance Data Alternatively, access Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program and click the HESA Instance link.	Update a HESA instance data record that the Create HESA Instance created or manually create a HESA instance data record. Enter or modify values that the system can use for creating Instance, Qualifications Awarded, and RAE entity data at the instance level (for the Student return). Enter or modify values that the system can use for creating Student entity data (for the ITT return) View or edit the Year of Student value that the Calculate Year of Student process has calculated. View or override the FTE value that the Calculate Full-Time Equivalence process has calculated.

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

Setting Up Data Capture Rules

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

Institution Data Capture

Academic Institution: PSUNV PeopleSoft University Create Fields

Find | View 100 First 34 of 156 Last

Field: EXCHANGE + -

Description:

Long Description:

☐ Fixed

Available at:	Include at:
☐	☐ Student
☒	☒ Instance
☐	☐ Advisor
☒	☒ Program
☐	☐ Program Offering
☒	☒ Program Offering Year
☒	☒ Plan
☐	☐ Plan Offering
☒	☒ Plan Offering Year
☒	☒ Subplan
☐	☐ Sub-Plan Offering
☒	☒ Sub-Plan Offering Year
☐	☐ Module

Institution Data Capture page

Create Fields

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

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

Fixed

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

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

Available At

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

Include At

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

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

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

Entering HESA Data for an Academic Program

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

Enrollment		Course		Dynamic Date		Program HESA Data		Program Offering/Year HESA																										
Academic Institution:		PSUNV PeopleSoft University																																
Academic Program:		FAU Fine Arts																																
Find View All First 1 of 1 Last																																		
Effective Date:		03/09/2009		Status:		Active																												
FTE Calculation Type:		Derive load from Program		FTE Load:		100																												
Program HESA Data Find View All First 1-4 of 4 Last <table border="1"> <thead> <tr> <th>*Field</th> <th>Description</th> <th>*Code</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>BITTM</td> <td>Bilingual ITT marker</td> <td>1</td> <td>Course does not lead to a form</td> <td>+ -</td> </tr> <tr> <td>CLSDCRS</td> <td>Closed course</td> <td>0</td> <td>Not a closed course</td> <td>+ -</td> </tr> <tr> <td>COLLORG</td> <td>Collaborating organisation</td> <td>1000</td> <td>Large private company</td> <td>+ -</td> </tr> <tr> <td>MSFUND</td> <td>Major source of funding</td> <td>01</td> <td>HEFCE</td> <td>+ -</td> </tr> </tbody> </table>										*Field	Description	*Code	Description		BITTM	Bilingual ITT marker	1	Course does not lead to a form	+ -	CLSDCRS	Closed course	0	Not a closed course	+ -	COLLORG	Collaborating organisation	1000	Large private company	+ -	MSFUND	Major source of funding	01	HEFCE	+ -
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Program Subject HESA Data Customize Find View All First 1-3 of 3 Last <table border="1"> <thead> <tr> <th>*HESA Subject</th> <th>Description</th> <th>*HESA Subject Percentage</th> <th>ITT Subject Flag</th> <th></th> </tr> </thead> <tbody> <tr> <td>A100</td> <td>Pre-clinical medicine</td> <td>30</td> <td>☐</td> <td>-</td> </tr> <tr> <td>B100</td> <td>Anatomy, physiology & patholog</td> <td>30</td> <td>☐</td> <td>-</td> </tr> <tr> <td>C100</td> <td>Biology</td> <td>40</td> <td>☐</td> <td>-</td> </tr> </tbody> </table>										*HESA Subject	Description	*HESA Subject Percentage	ITT Subject Flag		A100	Pre-clinical medicine	30	☐	-	B100	Anatomy, physiology & patholog	30	☐	-	C100	Biology	40	☐	-					
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B100	Anatomy, physiology & patholog	30	☐	-																														
C100	Biology	40	☐	-																														
Program Instance HESA Data Find View All First 1-4 of 4 Last <table border="1"> <thead> <tr> <th>*Field</th> <th>Description</th> <th>*Code</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>BRIDGE</td> <td>Foundation degree to degree br</td> <td>0</td> <td>Not a foundation degree to deg</td> <td>+ -</td> </tr> <tr> <td>FEEELIG</td> <td>Fee eligibility</td> <td>1</td> <td>Eligible to pay home fees</td> <td>+ -</td> </tr> <tr> <td>LOCSDY</td> <td>Location of study</td> <td>F</td> <td>On study year abroad for the y</td> <td>+ -</td> </tr> <tr> <td>MSTUFEE</td> <td>Major source of tuition fees</td> <td>01</td> <td>No award or financial backing</td> <td>+ -</td> </tr> </tbody> </table>										*Field	Description	*Code	Description		BRIDGE	Foundation degree to degree br	0	Not a foundation degree to deg	+ -	FEEELIG	Fee eligibility	1	Eligible to pay home fees	+ -	LOCSDY	Location of study	F	On study year abroad for the y	+ -	MSTUFEE	Major source of tuition fees	01	No award or financial backing	+ -
*Field	Description	*Code	Description																															
BRIDGE	Foundation degree to degree br	0	Not a foundation degree to deg	+ -																														
FEEELIG	Fee eligibility	1	Eligible to pay home fees	+ -																														
LOCSDY	Location of study	F	On study year abroad for the y	+ -																														
MSTUFEE	Major source of tuition fees	01	No award or financial backing	+ -																														

Program HESA Data page

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

Group Box	Used for Entering
Program HESA Data	Course entity fields and their associated values
Program Subject HESA Data	CourseSubject entity field values
Program Instance HESA Data	Instance entity fields and their associated values

Program Subject HESA Data

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

HESA Subject

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

HESA Subject Percentage

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

ITT Subject Flag (Initial Teacher Training subject flag)

Select to indicate that the subject is an ITT subject. The system uses this check box setting to derive the CourseSubject.ITTSUBJECT field.

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

Entering HESA Data for a Program Offering and Program Year

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

Enrollment Course Dynamic Date Program HESA Data Program Offering/Year HESA

Academic Institution: PSUNV PeopleSoft University
Academic Program: FAU Fine Arts

Effective Date: 03/09/2009 Status: Active

Program Offering HESA Data

*Academic Load: Full-Time
FTE Calculation Type: Derive load from Program FTE Load: 100

*Field	Description	*Code	Description
FEEELIG	Fee eligibility	1	Eligible to pay home fees
IMPRATE	Implied rate of council partia	20	

Program Year HESA Data

*Academic Load: Full-Time
FTE Calculation Type: Derive load from Program FTE Load: 100
*Year of Program: 1

*Field	Description	*Code	Description
DESTOCM	Destination of outward credit	AD	Andorra
FUNDLEV	Level applicable to funding co	10	Undergraduate

Program Offering/Year HESA page

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

Entering HESA Data for an Academic Plan

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

Academic Plan Table	Print Options	Taxonomy	Owner	Plan HESA Data	Plan Offering/Year HESA

Academic Institution:	PSUNV	PeopleSoft University
Academic Plan:	BIOLBS	Biology (BS)
		Major

Find | View All First 1 of 1 Last

Effective Date:	01/01/1900	Effective Status:	Active
FTE Calculation Type:		FTE Load:	0
Course Title			
	☒ Report to HESA ☒ Offshore Plan		

▼ Plan HESA Data

Find | View All First 1 of 1 Last

*Field	Description	*Code	Description	
				+ -

▼ Plan Subject HESA Data

Customize | Find | View All First 1 of 1 Last

*HESA Subject	Description	*HESA Subject Percentage	ITT Subject Flag	
B131	Cellular pathology	100	☐	+ -

▼ Plan Instance HESA Data

Find | View All First 1 of 1 Last

*Field	Description	*Code	Description	
FEEELIG	Fee Eligibility	1	Eligible to pay home fees	+ -

▼ Offshore Provision

Find | View All First 1 of 1 Last

*Field	Description	*Code	Description	
				+ -

Plan HESA Data page

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

Group boxes for the Student return on this page are similar to the group boxes on the Program HESA Data page.

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

Course Title	Optionally, enter a value that the system uses to derive the Course.CTITLE field. If you do not enter a value, the system derives the Course.CTITLE value from the plan description.
Report to HESA	Select to include the plan in the Course or Provision entity. If you select this check box for a plan, you cannot report data for its subplans.
Offshore Plan	Select to display the Offshore Provision group box. If you select this check box, the system includes the plan in the Aggregate Offshore return but does not include the plan in the Student return.

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

Entering HESA Data for a Plan Offering and Plan Year

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

Academic Plan Table	Print Options	Taxonomy	Owner	Plan HESA Data	Plan Offering/Year HESA

Academic Institution: PSUNV PeopleSoft University
Academic Plan: ARTHIST History of Art

Effective Date: 03/10/2009 **Status:** Active

Plan Offering HESA Data Find | View All First 1 of 1 Last

***Academic Load:** Full-Time
FTE Calculation Type: Derive load from Program **FTE Load:** 100

*Field	Description	*Code	Description
FEEELIG	Fee eligibility	1	Eligible to pay home fees
FTEMETHOD	FTE method	2	100:0

Plan Year HESA Data Find | View All First 1 of 2 Last

***Academic Load:** Full-Time
FTE Calculation Type: Derive load from Program **FTE Load:** 100
***Year of Program:** 1

*Field	Description	*Code	Description
SPECFEE	Special fee indicator	0	Standard/Prescribed fee
TYPEYR	Type of instance year	1	Course academic year contained

Plan Offering/Year HESA page

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

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

Entering HESA Data for a Subplan

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

Academic Sub-Plan Table		Academic Sub-Plan Taxonomy		Sub-Plan HESA		Sub-Plan Offering/Year HESA	
Academic Institution:	PSUNV	PeopleSoft University					
Academic Plan:	PSYCH-PHD	Psychology-PhD		Major			
Academic Sub-Plan:	CLINIC	Clinical Psych					
Find View All First 1 of 1 Last							
Effective Date:	01/01/1900		Effective Status:	Active			
FTE Calculation Type:			FTE Load:	0			
HESA Course Title:	CLINICAL PSY						
☒ Report to HESA ☒ Offshore Sub-Plan							
Sub-Plan HESA Data Find View All First 1 of 1 Last							
'Field	Description	'Code	Description				
			+ -				
Sub-Plan Subject HESA Data Customize Find View All First 1 of 1 Last							
'HESA Subject	Description	'HESA Subject Percentage	ITT Subject Flag				
			☐	+ -			
Sub-Plan Instance HESA Data Find View All First 1 of 1 Last							
'Field	Description	'Code	Description				
			+ -				
Offshore Provision Find View All First 1 of 1 Last							
'Field	Description	'Code	Description				
			+ -				

Sub-Plan HESA page

The fields on this page are similar to the fields on the Plan HESA Data page.

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

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

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

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

Entering HESA Data for a Subplan Offering and Subplan Year

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

Academic Sub-Plan Table		Academic Sub-Plan Taxonomy		Sub-Plan HESA		Sub-Plan Offering/Year HESA																
Academic Institution:	PSUNV	PeopleSoft University																				
Academic Plan:	ARTHIST	History of Art		Major																		
Academic Sub-Plan:	RARTHS	Roman Arts Minor																				
Effective Date:		03/10/2009		Status:		Active																
Sub-Plan Offering HESA Data Find View All First 1 of 1 Last																						
*Academic Load:		Full-Time				+ -																
FTE Calculation Type:		Derive load from Program		FTE Load:		100																
Find View All First 1-2 of 2 Last <table border="1"> <thead> <tr> <th>*Field</th> <th>Description</th> <th>*Code</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>FEEELIG</td> <td>Fee eligibility</td> <td>1</td> <td>Eligible to pay home fees</td> <td>+ -</td> </tr> <tr> <td>FTEMETHOD</td> <td>FTE method</td> <td>2</td> <td>100:0</td> <td>+ -</td> </tr> </tbody> </table>								*Field	Description	*Code	Description		FEEELIG	Fee eligibility	1	Eligible to pay home fees	+ -	FTEMETHOD	FTE method	2	100:0	+ -
*Field	Description	*Code	Description																			
FEEELIG	Fee eligibility	1	Eligible to pay home fees	+ -																		
FTEMETHOD	FTE method	2	100:0	+ -																		
Sub-Plan Year HESA Data Find View All First 1 of 1 Last																						
*Academic Load:		Full-Time				+ -																
FTE Calculation Type:		Derive load from Program		FTE Load:		100																
*Year of Program:		1																				
Find View All First 1-2 of 2 Last <table border="1"> <thead> <tr> <th>*Field</th> <th>Description</th> <th>*Code</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>FUNDLEV</td> <td>Level applicable to funding co</td> <td>10</td> <td>Undergraduate</td> <td>+ -</td> </tr> <tr> <td>LOCSDY</td> <td>Location of study</td> <td>6</td> <td>Distance learning - UK based s</td> <td>+ -</td> </tr> </tbody> </table>								*Field	Description	*Code	Description		FUNDLEV	Level applicable to funding co	10	Undergraduate	+ -	LOCSDY	Location of study	6	Distance learning - UK based s	+ -
*Field	Description	*Code	Description																			
FUNDLEV	Level applicable to funding co	10	Undergraduate	+ -																		
LOCSDY	Location of study	6	Distance learning - UK based s	+ -																		

Sub-Plan Offering/Year HESA page

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

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

Creating HESA Modules

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

Create HESA Module Data

Run Control ID: 23_sept_09_run
[Report Manager](#)
[Process Monitor](#)

Academic Institution: PeopleSoft University

Reporting Period: 2009/2010 Reporting Period

Create HESA Module Data page

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

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

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

Processing Steps

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

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

1. The process selects the current effective dated record of the course offering (that is, the process selects the most recent effective dated record on or before system date). This is to check whether the course offering is active at the time the process is run. For example, let us suppose two effective dated records exist for a course offering CALCULUS 1. One is dated August 01, 2008 and the other is dated August 01, 2009. If you run the Create HESA Module Data process on August 03, 2009, the process selects the CALCULUS 1 course offering record dated August 01, 2009.
2. If the selected course offering record status is inactive, the process does not create HESA Module Data records.
3. If the selected course offering record is active:
 - a. The process selects the earliest active effective dated record for the course offering. For example, in step 1 the process had selected a course offering record dated 02, August, 2009. If we assume that the course offering CALCULUS 1 has also got effective dated records dated 01 July, 2008 and 01, July 2009, the process selects the record dated 01 July, 2008.
 - b. If a HESA Module Data record does not exist for the selected record, the process creates a new record using the selected record. The process sets the Report to HESA value to Y.
 - c. If a HESA Module Data record exists, the process stops processing that course offering record.

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

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

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

2. If the selected course offering record is active and:
 - a. If an existing HESA Module Data record does not exist, the process creates a new record using the effective date of the selected course offering record. The process sets the Report To HESA value to Y.
 - b. If a HESA Module Data record exists with an effective date in the reporting period, the process stops processing that record.
 - c. If a HESA Module Data record with an effective date after the reporting period exists, the process updates the effective date of that record and any child field records using the effective date of the selected course offering record.
 - d. If a HESA Module Data record with an effective date before the reporting period exists, the process creates a new effective dated row using the HESA Module Data record and the effective date of the selected course offering record. The process also copies any existing child Module field records of the HESA Module Data record to the new effective dated HESA Module Data record.
3. If the selected course offering record is inactive, the process stops processing. Note that the process derives the active and inactive status value from the parent Course Catalog record of the course offering.

Entering HESA Data for a Module

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

HESA Module Data

Course ID: 001005 Calculus I
Long Course Title: Calculus I
Course Offering Nbr: 1
Academic Institution: PSUNV PeopleSoft University

Module Details Find | View All First 1 of 1 Last

***Effective Date:** 10/16/2008 31
☒ **Report to HESA**

Module Data Find | View All First 1-3 of 3 Last

*Field	Description	*Code	Description
CRDTPTS	Credit value of module	18	
MODLANG	Module available in a Celtic I	9	Not available through the med
MODYR	Module year	10	Year of instance A & wholly co

Module Subjects Customize | Find | View All First 1 of 1 Last

*Cost Centre	Description	*Subject	Description	*Percentage
24	Mathematics	G120	Applied mathematics	100.0

HESA Module Data page

In the HESA Module Data page:

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

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

Entering HESA Data for a Dummy Module

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

HESA Dummy Module Data

Academic Plan:ARTArt (BFA)

Year:1

Academic Institution:PSUNV PeopleSoft University

Module Details

Find | View AllFirst1 of 1Last

Effective Date:04/14/2007

Report to HESA flag

Module Data

Find | View AllFirst1 of 1Last

FieldDescriptionCodeDescription

Module Subjects

Customize | Find | View AllFirst1 of 1Last

Cost Centre	Description	Subject	Description	Percentage
08	Pharmacy & pharmacology	B100	Anatomy, physiology & patholog	100.0

HESA Dummy Module Data page

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

Creating HESA Instance and Person HESA Data Records for Students

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

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Create HESA Instance

Run Control ID: NG

[Report Manager](#) [Process Monitor](#) Run

Find | View All First 1 of 1 Last

*Academic Institution:

PSUNV

PeopleSoft University

Academic Career:

Bachelor

Academic Program:

LAU

Liberal Arts Undergraduate

Academic Plan:

Academic Sub-Plan:

Start Date:

Student Override

☒ Student Override Clear Data

Customize | Find | View All First 1 of 1 Last

	EmplID	Name		
1	SR0406	Cutter,Anthony		

Create HESA Instance page

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

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

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

Academic Career,Academic Program, Academic Plan, Academic Sub-Plan

Select values as needed to generate the HESA Instance records for students with the selected career, program, plan, or subplan.

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Start Date	Enter a date so that only students who matriculated on and after this date are included by the process.
Student Override	
Student Override	Select if you want to generate HESA Instance records for the IDs selected in the EmplID field. If you select the Student Override check box, the process ignores any values entered in the Academic Career, Academic Program, Academic Plan , Academic Sub-Plan, and Start Date fields.
EmplID (employee ID)	Enter the IDs of one or more students for whom the process must create the Instance data.

Entering HESA Data for a Person

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

Biographical DetailsAddressesRegional**Person HESA Data**

Lewis GrahamSR13469

Find | View AllFirst1 of 1Last

*Effective Date09/18/200831

StatusActive

+ -

Person HESA DataFind | View AllFirst1 of 1Last

*Field	Description	*Code	Description
ETHNIC	Ethnicity	10	White

+ -

Person HESA Data page

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

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

Entering HESA Instance Data for a Student

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

[New window](#) | [Personalize Page](#)

HESA Instance Data		Entry Profile Data	
Name:	Jean Marysville	ID:	SRGBR006
Academic Career:	Postgraduate	Student Career Nbr:	0
Academic Institution:	PeopleSoft University UK	Car Req Term:	Acad year 2007-2008
Academic Program:	Master of Science	Status:	Completed
			Student Program

Instance HESA Data	
*Effective Date:	17/09/2007
Academic Plan:	
Linked Career:	
Linked Career Number:	
HIN Population Year:	2010
Instance Identifier:	PGRD02007
Start Date of Instance:	17/09/2007
Year of Student:	
Year of Program:	1
☒ Report to HESA	

Instance Details			
*Field	Description	*Code	Description
LOCSDY	Location of study	H	Classroom
MODE	Mode of study	67	FE students continuous deliver
REDUCEDI	Reduced instance return indica	00	Not a reduced return

HESA Instance Data page (1 of 2)

Qualifications Awarded					
Personalize Find View All First 1 of 1 Last					
Award	Teaching Qualification				
*Qualification Awarded	Description	Classification	Description	Outcome of ITT Instance	Description
M00	Masters degree obtained typica				

Research Data		
Personalize Find View All First 1 of 1 Last		
*RAE Unit of Assessment	Description	*Unit of Assessment Percentage

FTE Details			
Personalize Find First 1 of 1 Last			
*Reporting Period	Calculated FTE	Override FTE	Report Zero
			☐

HESA Instance Data page (2 of 2)

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

Instance Identifier	Displays the value generated by the Create HESA Instance process when it creates a HESA Instance record. You can manually enter or modify this value. The system uses this value to derive the Instance.NUMHUS field (Student return) and Student.NUMHUS field (ITT return).
Academic Plan	Select the primary plan to be used for HESA reporting if the student has more than one active plan.
Start Date of Instance	Displays the date generated by the Create HESA Instance process. You can manually enter or modify this value. The system uses this value to derive the Instance.COMDATE (Student return) and Student.COMDATE (ITT return).
Year of Student	Displays the value generated by the Calculate Year of Student process. You can manually enter or modify this value. The system uses this value to derive the Instance.YEARSTU field (Student return) and Student.YEARSTU field (ITT return).
Year Of Program	Enter a value that the system uses to derive the Instance.YEARPRG field (Student return) and Student.YEARPRG field (ITT return).
Linked Career and Linked Career Number	Select a career to link this Instance to previous careers. The system treats all the linked careers for a student as a single Instance for HESA reporting.
HIN Population Year	Displays the value entered by the Import HIN Target List process. You can edit the value, if required. The Create Extract process uses the HIN Population Year value to determine which Instance entities to include in the return. If the HIN Population Year matches the reporting year of the reporting period, then the process automatically includes the Instance entity of the student regardless of other criteria (such as whether the Report To HESA is selected). Examples of valid HIN Population Year values include <i>2008</i> (for 2008/09 reporting) and <i>2009</i> (for 2009/10 reporting).
Report To HESA	Select to report the Instance to HESA. If the check box is cleared, the Create Extract process does not create a return extract for the instance.
<i>FTE Details</i>	
Calculated FTE	Displays the value calculated by the Calculate Full-Time Equivalence process.
Override FTE	Enter a value to override the Calculated FTE.
Report Zero	Select to report zero in STULOAD rather than the Calculated FTE or Override FTE values

Entering HESA Entry Profile Data for a Student

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

[New Window](#) | [Personalize Page](#)

HESA Instance Data		Entry Profile Data	
Name:	Andree Mozell	ID:	0315
Academic Career:	Undergraduate	Student Career Nbr:	0
Academic Institution:	PeopleSoft University UK	Status:	Active
Academic Program:	Bachelor of Science	Car Req Term:	Acad year 2011-2012

[Find](#) | [View All](#) | First 1 of 1 Last

Effective Date: 20/11/2011 ☐ Include Entry Profile

Entry Profile

[Find](#) | [View All](#) | First 1-4 of 9 Last

*Field	Description	*Code	Description
DOMICILE	Domicile	XF	England + -
PARED	Parental education	1	Yes + -
POSTCODE	Postcode	GL52 3LZ	+ -
PREVINST	Last institution attended	U00100	+ -

Entry Qualifications

[Personalize](#) | [Find](#) | [View All](#) | First 1-3 of 3 Last

*Type	Description	*Subject	Description	*Year	Sitting	Grade	Imported	Report to HESA	
A	GCE A Level	C22	Computer Studies	2011	Summer	B	☒	☒	+ -
A	GCE A Level	E13	English	2011	Summer	B	☒	☒	+ -
A	GCE A Level	M11	Mathematics	2011	Summer	B	☒	☒	+ -

Entry Profile Data page

Include Entry Profile

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

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

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

Imported

Indicates whether the data was imported from UCAS.

Report To HESA

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

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

Calculating Year of Student Values for Students

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

Calculate Year of Student

Calculate Year of Student

Run Control ID: 1009

[Report Manager](#)[Process Monitor](#)

Run

*Academic Institution:

PSUNV

PeopleSoft University

*Reporting Period:

2009/10

2009/2010 Reporting Period

Increment Year of Program:

☐

Student Override

☐ Student Override

Calculate Year of Student page

- Increment Year of Program

Select to increment the Year of Program value by one when the Calculate Year of Student process creates a new effective dated HESA Instance record for the reporting period.
- Student Override

Select to specify single or multiple students for whom the process should calculate YEARSTU.

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

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

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

Calculation Steps

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

Step 1: Initial Selection of Records

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

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

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

Step 2: Filter for Active Students

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

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

- The process selects all activated terms for the student career.

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

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

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

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

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

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

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

Step 3: Calculate YEARSTU

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

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

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

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

Step 4: Store the Calculated YEARSTU

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

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

1. The process creates a new effective dated record using the reporting period start date. It copies all the values of the existing record to the new record including child records.
2. The process sets the YEARSTU value to the calculated value.
3. If the Increment Year of Program parameter check box is selected and the existing record has a Year of Program value greater than zero, the process increments the value by one in the new record.

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

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

Calculating Full-Time Equivalence for Students

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

Calculate Full-Time Equivalence

Run Control ID: **FTE** [Report Manager](#) [Process Monitor](#) Run

FTE Calculation

***Academic Institution:**

Academic Career:

Academic Program:

***Reporting Period:** 2009/2010 Reporting Period

Academic Calendar:

***Default FTE Calculation Type:** Derive load from Modules

Maximum Calculated Value

PeopleSoft University

Undergraduate

2009/2010 Reporting Period

Derive load from Modules

☒ Consider Sub-Plans

☐ Include Dropped Classes

☐ Increment Year of Program

☐ Apportion Module Load

Clear

Student Override

☒ Student Override Clear Data

Customize Find View All				First	1-2 of 2	Last
Empl ID	Name					
SR0401	Beckett, David	+	-			
SR0402	Beer, Dalelia	+	-			

Calculate Full-Time Equivalence page

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

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

An institution can define a calculation type of either *Derive load from Modules* (that is, calculation based on the student's class enrollments) or *Derive load from Program* (that is, calculation based on the FTE load defined for the year or for the program, plan, and subplan) at each data capture level (for example, the Plan HESA Data page for plan level). A default calculation type run parameter is also available to enable institutions to apply the same calculation type to all students of a particular institution, career, or program without the need for defining the calculation type against each program, plan, or subplan.

Academic Career	Select a value to run the calculation process individually for each academic career. This enables your institution to apply a different FTE calculation type, academic calendars and full-time load to each distinct career. Required to select an academic calendar or academic program. Note. Do not select a value if you want to run the process for all academic careers in an institution. You should run the process for all academic careers only when the FTE Calculation Type is <i>Derive load from Modules</i> for all records. If the FTE Calculation Type is <i>Derive load from Program</i> for any record, then you must select both academic career and academic calendar as the run parameters.
Academic Calendar	Select a value that the process uses for program calculation to determine the start and end dates of terms associated with the calendar that fall within the reporting period. The process uses these dates to apportion load for discontinued students. Required if the Default Calculation Type is <i>Derive load from Program</i>.
Default FTE Calculation Type	Select a default value that the process uses if a calculation type is not defined for the program, plan, or subplan related to the HESA Instance record. Values include <i>Derive load from Modules</i> and <i>Derive load from Program</i>.
Maximum Calculated Value	Enter the maximum FTE value that the process can calculate. This field enables you to cap the calculated value to a maximum value, typically 100 for full-time students.
Consider Sub-Plans	Select to have the process consider subplan HESA records to determine FTE calculation type and FTE load. You can select a calculation type and enter an FTE load in the Sub-Plan HESA Data page or the Sub-Plan Offering/Year HESA page.
Include Dropped Classes	Select to have the process consider class enrollments with a status of <i>Dropped</i> along with class enrollments with a status of <i>Enrolled</i>.
Increment Year of Program	Select to have the existing Year of Program value increase by one when the Calculate Full-Time Equivalence process creates a new effective dated HESA Instance record for the reporting period.
Apportion Module Load	Select to have the process reduce the load of class enrollments for students who have discontinued, left, or cancelled. The process considers the selection or de-selection of this check box only when the derived calculation type is <i>Derive Load from Modules</i>. The process always reduces the load for discontinuation if the calculation type is <i>Derive load from Program</i>.
Student Override	Select to specify single or multiple students for whom the process should calculate FTE.

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

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

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

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

Calculation Steps

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

Step 1: Determine the Academic Career details

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

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

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

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

Step 2: Determine the FTE Calculation Type and FTE Load

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

1. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan Offering Year contains the selected subplan, academic load, and year of program, then the process selects the FTE values from the HESA Sub-Plan Offering Year.
2. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan Offering contains the selected subplan and academic load, then the process selects the FTE values from the HESA Sub-Plan Offering.
3. If Consider Sub-Plans run parameter is selected and the HESA Sub-Plan contains the selected subplan, then the process selects FTE values from the HESA Sub-Plan.
4. If the HESA Plan Offering Year contains the selected plan, academic load and year of program, then the process selects the FTE values from the HESA Plan Offering Year.
5. If the HESA Plan Offering contains the selected plan and academic load, then the process selects FTE values from the HESA Plan Offering.
6. If the HESA Plan contains the selected plan, then the process selects FTE values from the HESA Plan.
7. If the HESA Program Offering Year contains the selected program, academic load, and year of program, then the process selects FTE values from the HESA Program Offering Year.
8. If the HESA Program Offering contains the selected program and academic load, then the process selects FTE values from the HESA Program Offering.
9. If the HESA Program contains the selected program, then the process selects the FTE values from the HESA Program.
10. The process selects the Default Calculation Type run parameter value and sets the FTE Load to either 100 (if the calculation type is *Derive load from Program*) or zero (if calculation type is *Derive load from Modules*).

The following validations apply to the sequence of steps:

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

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

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

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

1. The process selects activated terms for the Student Career.

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

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

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

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

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

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

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

2. If the Apportion Module Load run parameter is selected and the Student Program status is Discontinued (DC) or Leave of Absence (LA) or Cancelled (CN), then the process reduces the module FTE as described in the following steps to reflect an early leaving date:
 - a. The process determines the Student Leave Date as the effective date of the selected Student Program plan record.
 - b. The process determines the Term End Date of the class enrollment.
 - c. If the Student Leave Date is null or on or after the Term End Date, then the process does not reduce the load. The process includes the full load in the total calculation.
 - d. If the Student Leave Date is before the Class End Date, the process reduces the load described as follows:
 - Determine the total student days in the reporting period from Class Start Date or Reporting Period Start Date (whichever is the latest) until the Student Leave Date (not including the day of the leave date in the total).
 - Determine the total class days in the reporting period from the Class Start Date or the reporting period start date (whichever is the latest) to Class End Date or Reporting Period End Date (whichever is the earliest) .
 - Determine the Class FTE = (student days / class days) * Class FTE.
 - If the load has been reduced (that is, total student days is less than total class days), then log a message to indicate that the load for that Course Offering has been reduced.

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

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

1. The process determines the Class Drop Date from the class enrollment record.
2. If the Class Drop Date is in the reporting period and before the Class End Date, the process reduces the load described as follows:
 - a. Determine the total student days from Class Start Date or Reporting Period Start Date (whichever is the latest) until the Class Drop Date (not including the day of the drop date in the total).
 - b. Determine the total class days from Class Start Date or Reporting Period Start Date (whichever is the latest) to Class End Date or Reporting Period End Date (whichever is the earliest)
 - c. Determine the Class FTE = (student days / class days) * Class FTE

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

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

The process logs a message confirming the calculated FTE values.

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

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

1. The process selects the most recent effective dated row in the Student Program record with effective date on or before the reporting period end date.
2. If the status is not Discontinued (DC), Leave of Absence (LA) or Cancelled (CN), then the Calculated FTE = FTE Load.
3. If the status is Discontinued (DC), Leave of Absence (LA), or Cancelled (CN), the process apportions the load according to date of discontinuation/leave/withdrawal as described in the following steps:
 - a. The process determines the full teaching period for the Academic Calendar with reference to each of the terms associated with the calendar and the reporting period (that is the term is associated with Academic Calendar run parameter and the Term Begin Date falls in the reporting period). Then, the process sets Teaching Start Date = the earliest Term Begin Date and Teaching End Date = the latest Term End Date.
 - b. The process determines the Student Days as being from the Teaching Start Date until the Effective Date of the discontinuation, leave of absence or withdrawal.
 - c. The process determines the Teaching Days as being from the Teaching Start Date to the Teaching End Date
 - d. $\text{Calculated FTE} = \text{FTE Load} * (\text{Student Days} / \text{Teaching Days})$
 - e. The process logs a message indicating the calculated FTE value after discontinuation or leave of absence.

Step 5: Store the Calculated FTE

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

1. If the Maximum Calculated Value run parameter value is specified and the Calculated FTE value is greater than the parameter value, then the process replaces the Calculated FTE value with the Maximum Calculated Value when the value is stored in the HESA Instance record.
2. If the most recent effective dated HESA Instance record has an effective date before the reporting period start date, the process performs the following steps:
 - a. The process creates a new effective dated record using the Reporting Period Start Date.
 - b. If the Increment Year of Program run parameter is selected and the existing record has a Year of Program value, then the process increments the Year of Program value by one in the new record.
3. The process selects the most recent effective dated HESA Instance record that starts on or before the reporting period end date (that is, the process selects either the newly created record above or the existing record that starts within the reporting period).
4. If there is an existing FTE record for the reporting period (in PS_SSR_HE_INST_FTE), the process updates the Calculated FTE value of the existing record. The process retains any existing Override FTE and Report Zero setting values.

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

Entering HESA Advisor Data for a Student

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

Instructor/Advisor TableApproved CoursesAdvisor HESA Data

David BeckettSR0401

Instructor DetailsFind | View AllFirst1 of 1Last

Academic Institution:PSUNVPeopleSoft UniversityEffective Date:09/26/2008Status:Active

Research HESA DataFind | View AllFirst1-2 of 2Last

*RAE Unit of Assessment	Description	Unit of Assessment Percentage
63	Art & design	70.0
64	History of art, architecture &	30.0

Advisor HESA Data page

You can enter a maximum of three RAE Units of Assessment. The total percentage for the three subjects must equal 100.

Entering DEGEST Value

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

Previous Degree Establishment

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

Entering DEGTYPE Value

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

Previous Degree Type

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

Preparing for Generating DLHE Return

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

- Identify the DLHE target population.
- Import POPDLHE survey target list.
- Add, view, and update surveys.

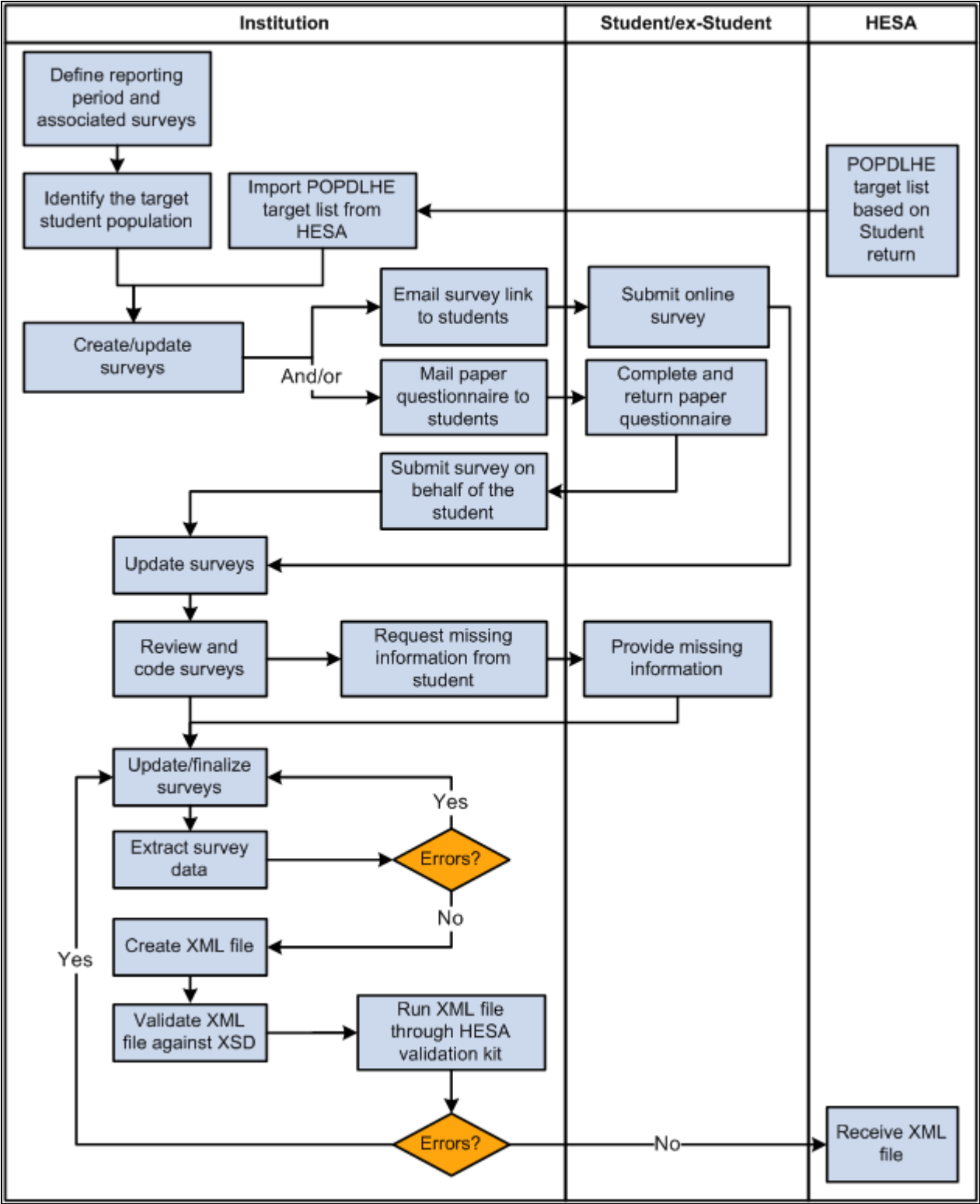
Understanding Preparing for Generating DLHE Return

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

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

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

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



Example for processing the DLHE survey

See Also

Setting Up a HESA Return section in this chapter

PeopleSoft Campus Self Service 9.0 PeopleBook, (GBR) Using DLHE Self-Service Survey

Pages Used to Prepare for Generating DLHE Return

Page Name	Definition Name	Navigation	Usage
Identify DLHE Target Population	SSR_HE_TARPOP	Records and Enrollment, HESA Reporting, Destination of Leavers, Identify Target Population	Run the process to examine student records for inclusion in a DLHE survey.
Import POPDLHE Survey Target List	SSR_HE_IMP_TPOP	Records and Enrollment, HESA Reporting, Destination of Leavers, Import Target Population	Run the process to import the target list (POPDLHE) and create/update DLHE survey records.
Survey Management	SSR_HE_SURV_MGMT	Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Management	Allows users to retrieve existing survey records, update the record, navigate to further detailed survey pages, navigate to the self-service survey pages or navigate to add a new survey.
Add a Survey	SSR_HE_SURV_ADD	Click the Add Survey button on the Survey Management page.	Supplementary page to allow users to manually add a new survey record.
Survey Details	SSR_HE_SURV_DTLS	Click the Details button on the Survey Management page.	Supplementary page to view further details of a survey and to add or update coded values required for the HESA extract.

Identifying DLHE Target Population

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

Identify DLHE Target Population

Run Control ID: 564
[Report Manager](#)
[Process Monitor](#)
Run

*Academic Institution: PSUNV

*Return Name: DLHE0910

*Survey: April

Student Override

☐ Student Override
Clear Data

Identify DLHE Target Population page

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

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

Processing Steps

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

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

Field	Derivation Criteria for the Student
End Date of Instance (Instance.ENDDATE)	The derived value should fall on or between the Qualifying Start Date and the Qualifying End Date for the survey. For the April Survey, the Instance.ENDDATE is between 01-AUG-YYYY and 31-DEC-YYYY, where YYYY is the year element from the start date of the reporting period. For the January Survey, the Instance.ENDDATE is between 01-JAN-YYYY and 31-JUL-YYYY, where YYYY is the year element from the end date of the reporting period.
Mode of Study (Instance.MODE)	The derived value should not equal 63 or 64 or MODE is 63 or 64 and QUAL begins with D or L.
Location of Study (Instance.LOCSDY)	The derived value is null or not S (The value S means that the student is studying abroad and is included in the Student record because the student has spent or will spend more than 8 weeks in UK).

Field	Derivation Criteria for the Student
Exchange Programmes (Instance.EXCHANGE)	The derived value is null or is not one of the following incoming exchange student codes: • 2 (Incoming TEMPUS student) • 4 (Other incoming exchange or visiting student) • 8 (Incoming LLP ERASMUS student) • 9 (Incoming LLP COMENIUS student) • A (Incoming ERASMUS MUNDUS student) • Z (Student studying mainly overseas as part of a collaboration)
Qualification Awarded (QUAL)	There must be is at least one derived QUAL value that has a code that is not null or NULL ERROR and is not one of the following: For Intercolated degrees: <i>H24</i> (First degree with honours on the intercalated pattern) For awards for visiting students: • L91 (Visiting research students at levels D or L, with formal or informal credit) • M91 (Visiting taught students at levels E or M, with formal or informal credit) • H91 (Visiting students at level H, with formal or informal credit) • I91 (Visiting students at level I, with formal or informal credit) For Post-registration health and social care awards: • M76 (Post-registration health and social care qualification at level M) • H76 (Post-registration health and social care qualification at level H other than a first degree with honours) • I76 (Post-registration health and social care qualification at level I other than an ordinary (non-honours) first degree) • J76 (Post-registration health and social care qualification at level J) For professional qualifications for serving schoolteachers: • M72 (Post-registration education qualification at level M other than a masters degree for serving schoolteachers) • H72 (Professional qualification at level H for serving schoolteachers other than a first degree with honours) • I72 (Professional qualification at level I for serving schoolteachers) For awards of credit: • D90 (Advanced supervised research at level D for institutional credit) • E90 (Advanced taught study at level E for institutional credit) • L90 (Advanced supervised research at level L for institutional credit)

Field	Derivation Criteria for the Student
Reason for Ending Instance (Instance.RSNEND)	The derived value is not 5.

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

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

Survey Creation

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

Importing POPDLHE Survey Target List

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

Import POPDLHE Survey Target List page

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

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

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

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

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

Processing Steps

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

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

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

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

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

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

If the process finds multiple HESA instance records, it selects the most recent effective dated record. For each HESA instance record, it selects the most recent effective dated record on or before the reporting period end date. If there is no existing survey for the combination of Institution, EMPLID, Academic Career, Student Career Number, Return Name and DLHE Survey, then the process creates a new record. The process then sets the Survey Source to *P*. If there is an existing survey, it updates the record.

Adding, Viewing, and Updating Surveys

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

Survey Management

'Academic Institution'

PSUNV

PeopleSoft University

'Return Name:'

DLHE0910

Survey

ID

Last Name

First Name

HUSID

Survey Status

Source

Survey Method

Search Surveys

Clear

Add Survey

Customize Find First 1 of 1 Last										
ID	Last Name	First Name	Academic Career	Student Career Nbr	HUSID	Survey	Source	*Survey Status	Details	Enter Survey
1 SR0400	Beck	Ana	UGRD		0 9811841054199	April	Manual	New	Details	Enter Survey

Survey Management page

The Survey Management page enables users to retrieve existing survey records and either update the record on the page, navigate to a further detailed survey update page, navigate to the self-service DLHE Survey pages, or navigate to add a new survey.

Survey Status

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

Source

Select the source translate values of the survey.

Survey Method

Select the method of data collection.

Details

Click to access the Survey Details page where you can review further details of the survey and add codes where required.

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Enter Survey Click to access the self-service Enter DLHE Survey page of the student where you can update the survey on behalf of the student.

Add Survey Click to access the Add a Survey page where you can add a new survey record.

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

Self-service Enter DLHE Survey page

Note that students can access this self-service page from the Student Center page.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, (GBR) Using DLHE Self-Service Survey

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

Adding a Survey

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

Add a Survey

*Academic Institution

PSUNV

PeopleSoft University

*Return Name

DL1112

*Survey

January

*ID

AA0001

Adams, Kimberly

*Academic Career

UGRD

Student Career Nbr

0

HUSID

1011841000006

Instance Identifier

UGRD0

Course ID

PSYCH

Psychology

Teacher Training Course

Survey Method

01

Standard questionnaire

Save

Add

Return

Add a Survey page

Survey Select the survey translate value for the April or January survey.

- ID

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

Select the career for the selected person ID.

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

Viewing or Updating Survey Details

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

Survey Details

Name

Fredrich Jones

Academic Institution

PeopleSoft University UK

HUSID

0711841000051

Course ID

COMPSCI

Computer Science

ID

SRGBR002

Academic Career

UGRD

Instance Identifier

UGRD02007

Teacher Training Course

1

Date of Birth

02/01/1975

Student Career Nbr

0

Survey

Return Name

DLHE1112

Census Date

01/04/2012

*Survey Status

Saved

Survey Method

04

Electronic reply (email/web)

Survey

April Survey

Survey Start Date

01/01/2011

Survey End Date

31/12/2013

Source

Manually added

Newly Qualified Teacher Status:

☒

Enter Survey

Survey Details page (1 of 2)

Employment Circumstances

Q3 - Job Title

IT Developer

Q4 - Job Duties

Developing software

Occupational Classification

11500

Financial institution managers and directors

Postdoctoral Research Contract

2

No

Q11 - Town/City/Area

Q11 - Postcode (UK only)

Q11 - Country

UNITED STATES

Employment Country

XK

United Kingdom

Further Study

Q25 - Course Name

Course Name

Q26 - Subject

Subject

JACS Subject

B190

Anatomy, physiology & pathology not elsewhere classified

Q27 - Institution Name

Institution

Institution Providing Study

2

Other Non-UK university or college

Survey Details page (2 of 2)

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

- Survey Status

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

Select the method of data collection.
- Newly Qualified Teacher Status

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

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

Employment Circumstances

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

- Q3 – Job Title

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

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

Further Study

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

Q25 - Course Name	Displays the answer provided by the student to Question 25 (CRSENAME) on the survey. If required, you can manually edit the value.
Q26 - Subject Area	Displays the answer provided by the student to Question 26 (CRSESBJ) on the survey. If required, you can manually edit the value.
JACS Subject	Select the JACS coded value based on the answers provided in Question 25 and 26 on the survey.
Q27 - Institution Name	Displays the answer provided by the student to Question 27 (INSTNAME) on the survey.
Institution Providing Study	Select the UC PROV coded value based on the answers provided in Question 27 on the survey.

Generating a HESA Return and Creating a Return File

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

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

Understanding Generating a HESA Return and Creating a Return File

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

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

After reviewing the return data for the Student, Offshore and ITT returns, use the Create XML Application Engine (SSR_HE_GXML) process to produce the XML file and for DLHE, use the Create DLHE File Application Engine (SSR_HE_DLHE) process to produce the csv file. After the process generates the XML file, validate the file using the Validate XML Application Engine (SSR_HE_VXML) process. You can review the errors reported by the Validate XML process, correct the errors, and rerun the extract process using the same or revised extract criteria. You can also validate the XML files using the HESA Validation Kit. The HESA Validation Kit generates an error file that you can import into a Campus Solutions staging table. Once the records are imported, re-run the Create Extract process just for those records with validation errors. You can review these error records using the Extract Data pages, correct the errors, and rerun the extract process using the same or revised extract criteria.

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

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

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import HIN Target List File	SR_HE_HIN_RC	Records and Enrollment, HESA Reporting, Extract Processing, Import HIN Target List File	Import the target list and select the HESA Instance Data records that the institution must include in the next year's Student return.
Create Extract Data	SSR_HE_EXT_PRC_RC	Records and Enrollment, HESA Reporting, Extract Processing, Create Extract	Generate return data. Refer to the (GBR) HESA Field Derivation appendix in this PeopleBook for information about how the Create Extract process derives values for the entities and fields.
Institution Extract Data	SSR_HE_INSTITU_EXT	Records and Enrollment, HESA Reporting, Extract Data, Institution Extract Data	Review the Institution entity data that the Create Extract process generates. You can review the Institution entity data for Aggregate Offshore, Student, DLHE, and ITT returns.
DLHE Extract Data	SSR_HE_DLHE_EXT	Records and Enrollment, HESA Reporting, Extract Data, DLHE Survey Data	Review the Survey entity data that the Create Extract process generates.
Module Extract Data	SSR_HE_MOD_EXT	Records and Enrollment, HESA Reporting, Extract Data, Module Extract Data	Review the Module and Module Subject entity data that the Create Extract process generates.
Course Extract Data	SSR_HE_CRS_EXT	Records and Enrollment, HESA Reporting, Extract Data, Course Extract Data	Review the Course and Course Subject entity data that the Create Extract process generates.
Student Extract Data	SSR_HE_STUD_EXT	Records and Enrollment, HESA Reporting, Extract Data, Student Extract Data	Review the data that the Create Extract process generates for a student.
Instance Extract Data	SSR_HE_INST_EXT	Records and Enrollment, HESA Reporting, Extract Data, Student Extract Data, Instance Extract Data	Review the Instance, Student On Module, Entry Profile, Qualifications On Entry, Qualifications Awarded, and RAE entity data that the Create Extract process generates for a student.

Page Name	Definition Name	Navigation	Usage
Provision Extract Data	SSR_HE_PROV_EXT	Records and Enrollment, HESA Reporting, Extract Data, Provision Extract Data	Review the Provision entity data that the Create Extract process generates for a student's Aggregate Offshore return.
ITT Extract Data	SR_HE_ISTUD_EX	Records and Enrollment, HESA Reporting, Extract Data, ITT Extract Data	Review the Student and Course Subject entity data that the Create Extract process generates for a student's ITT return.
HESA Extract XML	SSR_HE_GXML_RC	Records and Enrollment, HESA Reporting, Extract Processing, Create XML	Create the XML file for HESA submission.
HESA Validate XML	SSR_HE_VXML_RC	Records and Enrollment, HESA Reporting, Extract Processing, Validate XML	Validate the XML file generated by the Create XML process.

Importing the HIN Target List

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

Import HIN Target List

Import HIN Target List File

Run Control ID: HIN091

[Report Manager](#)
[Process Monitor](#)
[Run](#)

Process Parameters

*Academic Institution:

PSUNV

*Reporting Period

2009/10

*XML Path/File Name

\\PLE_DS\TEMP\0001.xml

☐ Increment Year of Program

Import HIN Target List File page

Before you run the process, ensure the following exist:

- HESA Instance Data records. These record contain the HIN Population Year field to store the reporting year value.

- Instance Identifier values in the HESA Instance Data records must match the NUMHUS values in the target list file.
- EMPLID values must match the OWNSTU values in the target list.

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

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

The following steps describe the Import HIN Target List File process:

1. The Import HIN Target List File process imports the target list into the staging tables.
2. For each staging record, the process finds HESA Instance records in Campus Solutions database by matching the academic institution (provided as the run parameter), EMPLID (provided as OWNSTU in the target list record), and Instance Identifier (provided as NUMHUS in the target list record). This may mean multiple records are picked up for the same Instance Identifier.
3. The process logs messages for those records that do not have a matching HESA Instance record. The process retains the unmatched record in the staging table.
4. If the most recent effective dated HESA Instance record has an effective date before the reporting period start date:
 - a. The Import HIN Target List File creates a new effective dated record using the reporting period start date.
 - b. The process sets the HIN Population Year to the reporting year value of the reporting period parameter.
 - c. If the Increment Year of Program run parameter is selected and the existing record has a Year of Program value greater than zero, then the process increments the year of program by one in the new record.
5. If a HESA Instance record starts within the reporting period, the process sets the HIN Population Year of the existing record to the reporting year value of the reporting period parameter.

Generating a HESA Extract

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

Create Extract Data

Run Control ID: NG03 [Report Manager](#) [Process Monitor](#) [Run](#)

Return

*Academic Institution PeopleSoft University

Return Type Student Return

*Return Name ☐ Retain Data from Previous Run

Course/Module

Academic Career Undergraduate

☒ Include Course Entities

☐ Null Errors Only ☐ Validation Errors Only

Academic Plan

Academic Sub-Plan

☒ Include Module Entities

☐ Null Errors Only ☐ Validation Errors Only

Course ID General Biochemistry

Course Offering Nbr

Student

☒ Include Student Entities

☐ HIN Population Only ☐ Null Errors Only ☐ Validation Errors Only

Student Override

☐ Student Override

Create Extract Data page

- Return Type** Enter a return type to filter the list of available returns in the Return Name field.
- Return Name** Enter the return for which the process should generate the reporting data. You set up a return using the Returns Setup component.
- Retain Data from Previous Run** Select to have the Create Extract process delete the existing inactive data, update the existing active data to inactive, and to extract new data. If the check box is cleared, then the process deletes all the existing data (both active and inactive) records and extracts the new data.

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

Course/Module

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

You can use this region for only Student return. This region is not applicable for ITT, Offshore, and DLHE returns.

Academic Career

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

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

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

Include Course Entities

Select to include the Course and Course Subject extracts.

Null Errors Only

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

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

Validation Errors Only

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

Academic Plan

Select to restrict Course extract to a particular plan.

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

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

Academic Sub-Plan

Select to restrict Course extract to a particular subplan.

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

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

Include Module Entities

Select to include the Module and Module Subject extracts.

Null Errors Only

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

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

Validation Errors Only

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

Course ID and Course Offering Nbr

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

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

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

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

Student

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

Include Student Entities

Select to include the student-related extracts.

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

HIN Population Only

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

The system enables this check box for only Student returns.

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

Null Errors Only

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

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

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

Validation Errors Only

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

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

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

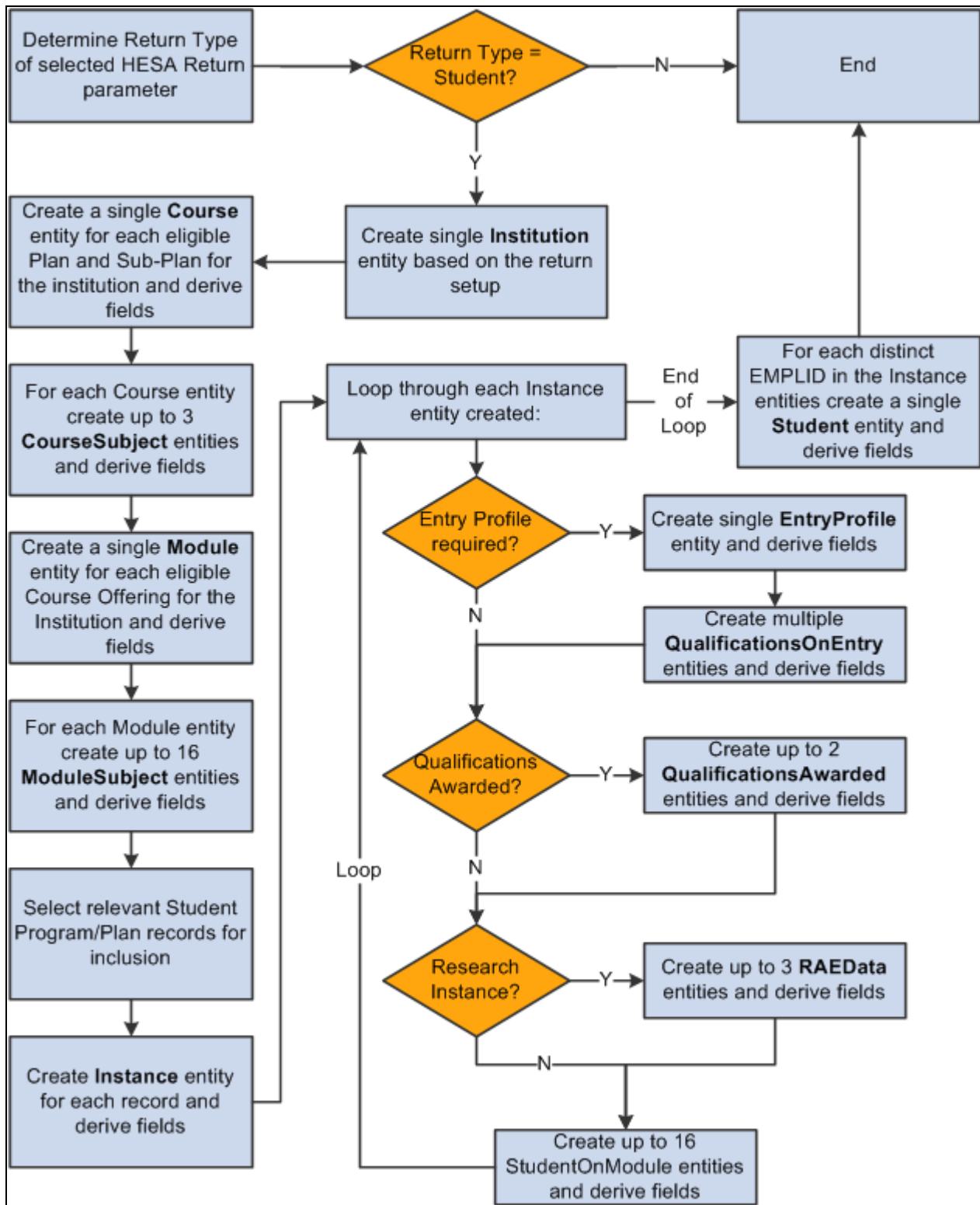
Student Override

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

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

Processing Diagram

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



Process for Creating Student Return Entities

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

Refer to the (GBR) HESA Field Derivation appendix in this PeopleBook for information about how the system includes records for each entity. Also, refer to the following sections in the (GBR) HESA Field Derivation appendix for information about how the entities are processed when you select the validation only and null only check boxes:

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

HESA Validation Errors

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

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

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

Using File Parser to import HESA Validation Kit errors

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the File Parser Process."

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

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

Context Definition

Record Tree

*Context Name

HESA Validation Import

Conversion Definition

Staging Table Records

Find | View All

First 1 of 1 Last

*Record

SSR_HE_VAL_STG

Staging Tbl for HESA Validate

Sort Order

1

Parent Record

Synchronize Record Fields

Staging Table Fields

Customize | Find | View 10 |

First 1-18 of 18 Last

Mapping

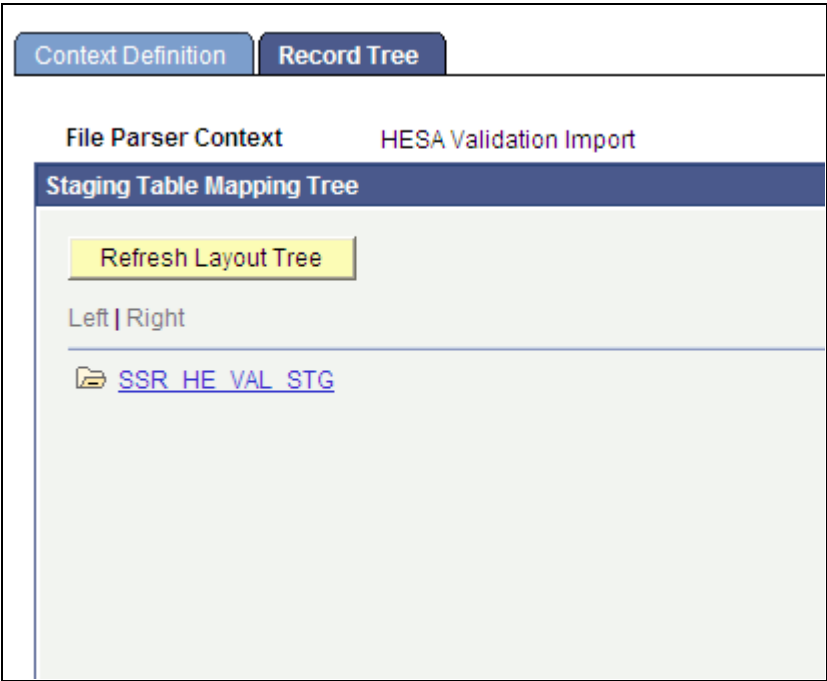
	Field Name	Field Type	*Mapping Action	Visible for Mapping
1	SSR_HE_LEVEL	Char	No Default	☒
2	SSR_HE_RULE_NUM	Char	No Default	☒
3	SSR_HE_RULE_DESC	Char	No Default	☒
4	SSR_HE_COLUMN1	Char	No Default	☒
5	SSR_HE_COLUMN2	Char	No Default	☒
6	SSR_HE_COLUMN3	Char	No Default	☒
7	SSR_HE_COLUMN4	Char	No Default	☒
8	SSR_HE_COLUMN5	Char	No Default	☒
9	SSR_HE_COLUMN6	Char	No Default	☒
10	SSR_HE_COLUMN7	Char	No Default	☒
11	SSR_HE_COLUMN8	Char	No Default	☒

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

12	SSR_HE_COLUMN9	Char	No Default	☒
13	SSR_HE_COLUMN10	Char	No Default	☒
14	SSR_HE_COLUMN11	Char	No Default	☒
15	SSR_HE_COLUMN12	Char	No Default	☒
16	SSR_HE_COLUMN13	Char	No Default	☒
17	SSR_HE_COLUMN14	Char	No Default	☒
18	SSR_HE_LINE_NUM	Char	No Default	☒

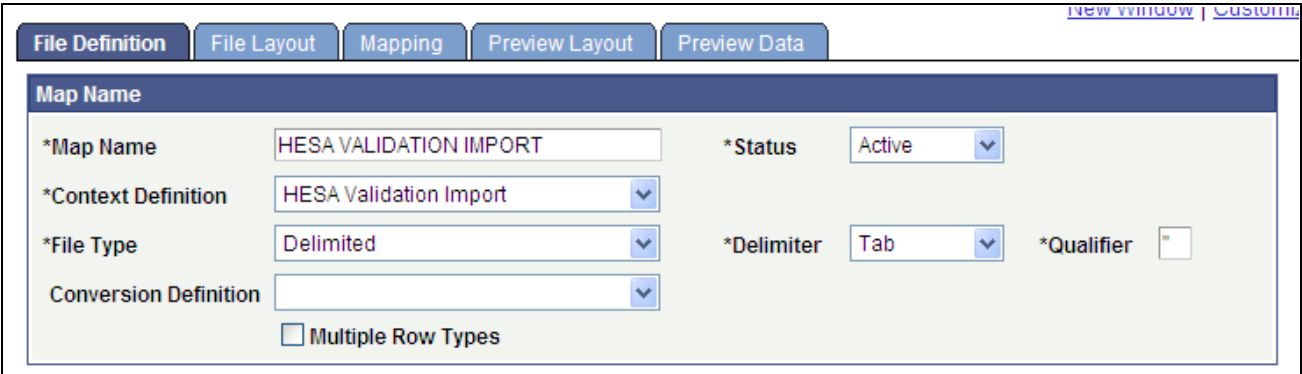
Context Definition setup for HESA error processing (2 of 2)

Click the Refresh Layout Tree link on the Record Tree page to view the staging table (SSR_HE_VAL_STG) that holds the imported validation errors. The following is an example of the Record Tree page for SSR_HE_VAL_STG:



Record Tree page for SSR_HE_VAL_STG

The PeopleSoft system delivers an example definition that includes the possible validation error values that you can import:



Example of a File Definition page

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

[New window](#) | [Custom](#)

File Definition | **File Layout** | Mapping | Preview Layout | Preview Data

Map Name: HESA VALIDATION IMPORT

Row Types: Find First 1 of 1 Last

Row Type: HESA VALIDATION IMPORT Staging Table [Load Fields](#)

File Fields: Customize | Find | View 10 | | First 1-17 of 17 Last

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

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

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

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

Map the key fields of COURSEID, MODID, and OWNSTU to a staging table column if the values for the fields are provided in the errors file. Also, map the Level, Rule Number, and Rule Description values. The following is an example of the Mapping page with the mappings for these fields:

File Definition | File Layout | **Mapping** | Preview Layout | Preview Data

Map Name: HESA VALIDATION MIN

Row Types: HESA VALIDATION MIN

Field Mapping: SSR_HE_VAL_STG Row 1 Force Insert Auto Map Synchronize to Context

Field Mapping Detail

Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Skip if Blank
1 SSR_HE_LEVEL	Char	No	Direct from File	Level	☐	☐
2 SSR_HE_RULE_NUM	Char	No	Direct from File	Rule number	☐	☐
3 SSR_HE_RULE_DESC	Char	No	Direct from File	Rule description	☐	☐
4 SSR_HE_COLUMN1	Char	No	Direct from File	COURSEID	☐	☐
5 SSR_HE_COLUMN2	Char	No	Direct from File	MODID	☐	☐
6 SSR_HE_COLUMN3	Char	No	Direct from File	OWNSTU	☐	☐
7 SSR_HE_COLUMN4	Char	No	None			
8 SSR_HE_COLUMN5	Char	No	None			
9 SSR_HE_COLUMN6	Char	No	None			
10 SSR_HE_COLUMN7	Char	No	None			

Mapping for the minimum fields (1 of 2)

11 SSR_HE_COLUMN8	Char	No	None			
12 SSR_HE_COLUMN9	Char	No	None			
13 SSR_HE_COLUMN10	Char	No	None			
14 SSR_HE_COLUMN11	Char	No	None			
15 SSR_HE_COLUMN12	Char	No	None			
16 SSR_HE_COLUMN13	Char	No	None			
17 SSR_HE_COLUMN14	Char	No	None			
18 SSR_HE_LINE_NUM	Char	No	Direct from File	Line Number	☐	☐

Mapping for the minimum fields (2 of 2)

To process the staging table records, the Create Extract process does not rely on values existing in a particular column but the process will select the key COURSEID, MODID and OWNSTU values based on the header row value for the column in the error file. Therefore, you must include the header row in the error file being imported.

Other than the key and Level, Rule Number and Rule Description values, you can map the remaining fields to import the full details of the errors into the staging table record. This step is optional because the non-key values are not required for the subsequent processing of the staging table records by the Create Extract process.

This is the mapping for the full Student return error file:

File DefinitionFile LayoutMappingPreview LayoutPreview Data

Map NameHESA VALIDATION IMPORT

Row Types

FindFirst1 of 1Last

Row TypeHESA VALIDATION IMPORT

Field Mapping

FindView AllFirst1 of 1Last

*RecordSSR_HE_VAL_STGRow1☐ Force InsertAuto MapSynchronize to Context

Field Mapping Detail

PersonalizeFindView 10First1-18 of 18Last

MappingValue Conversion

	Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Skip if Blank
1	SSR_HE_LEVEL	Char	No	Direct from File	Level	☐	☐
2	SSR_HE_RULE_NUM	Char	No	Direct from File	Rule number	☐	☐
3	SSR_HE_RULE_DESC	Char	No	Direct from File	Rule description	☐	☐
4	SSR_HE_COLUMN1	Char	No	Direct from File	COURSEID	☐	☐
5	SSR_HE_COLUMN2	Char	No	Direct from File	SBJCA	☐	☐
6	SSR_HE_COLUMN3	Char	No	Direct from File	MODID	☐	☐
7	SSR_HE_COLUMN4	Char	No	Direct from File	MODSBJ	☐	☐
8	SSR_HE_COLUMN5	Char	No	Direct from File	COSTCN	☐	☐
9	SSR_HE_COLUMN6	Char	No	Direct from File	OWNSTU	☐	☐
10	SSR_HE_COLUMN7	Char	No	Direct from File	HUSID	☐	☐

Mapping for the full error file (1 of 2)

11	SSR_HE_COLUMN8	Char	No	Direct from File	OWNINST	☐	☐
12	SSR_HE_COLUMN9	Char	No	Direct from File	NUMHUS	☐	☐
13	SSR_HE_COLUMN10	Char	No	Direct from File	QUALSBJ	☐	☐
14	SSR_HE_COLUMN11	Char	No	Direct from File	QUALTYPE	☐	☐
15	SSR_HE_COLUMN12	Char	No	Direct from File	QUAL	☐	☐
16	SSR_HE_COLUMN13	Char	No	Direct from File	UOA2008	☐	☐
17	SSR_HE_COLUMN14	Char	No	None			
18	SSR_HE_LINE_NUM	Char	No	Direct from File	Line Number	☐	☐

Mapping for the full error file (2 of 2)

As with the Student return, for the ITT return, you must map the Level, Rule Number and Rule Description values along with the key OWNSTU value. The File Parser process uses these mappings to identify the extract records that are to be re-processed by the Create Extract process.

File DefinitionFile LayoutMappingPreview LayoutPreview Data

Map NameHESA VALIDATION IMPORT ITT MIN

Row Types

FindFirst1 of 1Last

Row TypeHESA VALIDATION IMPORT ITT MIN

Field Mapping

FindView AllFirst1 of 1Last

*RecordSSR_HE_VAL_STGRow1Force InsertAuto MapSynchronize to Context

Field Mapping DetailPersonalizeFindView 10First1-18 of 18Last

MappingValue Conversion

Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Skip if Blank
1 SSR_HE_LEVEL	Char	No	Direct from File	Level	☐	☐
2 SSR_HE_RULE_NUM	Char	No	Direct from File	Rule number	☐	☐
3 SSR_HE_RULE_DESC	Char	No	Direct from File	Rule description	☐	☐
4 SSR_HE_COLUMN1	Char	No	Direct from File	OWNSTU	☐	☐
5 SSR_HE_COLUMN2	Char	No	None			
6 SSR_HE_COLUMN3	Char	No	None			
7 SSR_HE_COLUMN4	Char	No	None			
8 SSR_HE_COLUMN5	Char	No	None			
9 SSR_HE_COLUMN6	Char	No	None			
10 SSR_HE_COLUMN7	Char	No	None			

Mapping for the minimum fields — ITT (1 of 2)

11 SSR_HE_COLUMN8	Char	No	None			
12 SSR_HE_COLUMN9	Char	No	None			
13 SSR_HE_COLUMN10	Char	No	None			
14 SSR_HE_COLUMN11	Char	No	None			
15 SSR_HE_COLUMN12	Char	No	None			
16 SSR_HE_COLUMN13	Char	No	None			
17 SSR_HE_COLUMN14	Char	No	None			
18 SSR_HE_LINE_NUM	Char	No	Direct from File	Line Number	☐	☐

Mapping for the minimum fields — ITT (2 of 2)

This is the mapping for the full ITT error file:

File DefinitionFile LayoutMappingPreview LayoutPreview Data

Map NameHESA VALIDATION IMPORT ITT

Row Types

FindFirst1 of 1Last

Row TypeHESA VALIDATION IMPORT ITT

Field Mapping

FindView AllFirst1 of 1Last

*RecordSSR_HE_VAL_STGRow1☐ Force InsertAuto MapSynchronize to Context

Field Mapping Detail

PersonalizeFindView 10First1-18 of 18Last

MappingValue Conversion

Field Name	Field Type	Required	*Mapping Action	File Field Name	Sub Parse Field	Skip if Blank
1 SSR_HE_LEVEL	Char	No	Direct from File	Level	☐	☐
2 SSR_HE_RULE_NUM	Char	No	Direct from File	Rule number	☐	☐
3 SSR_HE_RULE_DESC	Char	No	Direct from File	Rule description	☐	☐
4 SSR_HE_COLUMN1	Char	No	Direct from File	OWNSTU	☐	☐
5 SSR_HE_COLUMN2	Char	No	Direct from File	HUSID	☐	☐
6 SSR_HE_COLUMN3	Char	No	Direct from File	RECID	☐	☐
7 SSR_HE_COLUMN4	Char	No	Direct from File	UKPRN	☐	☐
8 SSR_HE_COLUMN5	Char	No	Direct from File	SBJCA	☐	☐
9 SSR_HE_COLUMN6	Char	No	None			
10 SSR_HE_COLUMN7	Char	No	None			

Mapping for the full error file — ITT (1 of 2)

11 SSR_HE_COLUMN8	Char	No	None			
12 SSR_HE_COLUMN9	Char	No	None			
13 SSR_HE_COLUMN10	Char	No	None			
14 SSR_HE_COLUMN11	Char	No	None			
15 SSR_HE_COLUMN12	Char	No	None			
16 SSR_HE_COLUMN13	Char	No	None			
17 SSR_HE_COLUMN14	Char	No	None			
18 SSR_HE_LINE_NUM	Char	No	Direct from File	Line Number	☐	☐

Mapping for the full error file — ITT (2 of 2)

On the Preview Data page, you can attach an error file and generate a preview based on the first row in the error file. This lets you check whether the values will populate the correct columns in the staging table. The following is an example of the Preview Data page:

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[New Window](#) | [Customize Page](#)

File Definition | File Layout | Mapping | Preview Layout | **Preview Data**

Map Name: HESA VALIDATION IMPORT A Preview Data

Attached File: ST0910A_Errors.txt Add Attachment Delete Attachment View Attachment

Row Types Find First **1 of 1** Last

Row Type: HESA VALIDATION IMPORT A

Field Mapping Find | View All First **1 of 1** Last

Record: SSR_HE_VAL_STG Row: 1 + -

Field Values Customize | Find | View 10 | First **1-16 of 16** Last

Field Name	Value
1 SSR_HE_LEVEL	Level
2 SSR_HE_RULE_NUM	Rule number
3 SSR_HE_RULE_DESC	Rule description
4 SSR_HE_COLUMN1	COURSEID
5 SSR_HE_COLUMN2	
6 SSR_HE_COLUMN3	MODID
7 SSR_HE_COLUMN4	MODSBJ
8 SSR_HE_COLUMN5	COSTCN
9 SSR_HE_COLUMN6	OWNSTU
10 SSR_HE_COLUMN7	HUSID
11 SSR_HE_COLUMN8	OWNINST
12 SSR_HE_COLUMN9	NUMHUS
13 SSR_HE_COLUMN10	
14 SSR_HE_COLUMN11	
15 SSR_HE_COLUMN12	
16 SSR_HE_LINE_NUM	

Example of the Preview Data page

In the preceding example, note that because the header row does not include a label for Line Number that value is blank in the preview.

Reviewing the Extract Data

Use the Institution Extract Data, Module Extract Data, Course Extract Data, Student Extract Data, and Instance Extract Data pages to review the Student return extract data.

Use the Institution Extract Data and Provision Extract Data pages to review the Aggregate Offshore return data.

Use the Institution Extract Data and ITT Extract Data pages to review the ITT return data.

Use the DLHE Extract Data page to review the DLHE return data.

The following example shows an Extract Data page:

Module Extract Data

Academic Institution: PSUNV **Return Type:** STUDENT
Return Name: AT Return **Reporting Period:** 2008/09
Module ID: 0012341 **Module Title:** Introduction to Anthropology

Module Details					
Find View All First 1 of 1 Last					
Field	Derived Value	Description	Derivation Step	Reported Value	Derived Value Overridden
CRDTPTS	NULL ERROR		4	NULL ERROR	☐
CRDTSCM	7	Other scheme	2	7	☐
FTE	90		2	90	☐
LANGPCNT					☐
LEVLPTS	3	HE Honours	2	3	☐
MODID	0012341			0012341	☐
MODLANG					☐
MTITLE	Introduction to Anthropology			Introduction to	☐

Module Subjects					
Find View All First 1 of 1 Last					
Field	Derived Value	Description	Derivation Step	Reported Value	Derived Value Overridden
COSTCN	17	Chemical engineering	1	17	☐
MODSBJ	B140	Neuroscience	1	B140	☐
MODSBJP	100		1	100	☐

Example of an Extract Data page

You can use the Extract Data pages to override the derived field value. For example, you can enter a different value for ModuleSubject.COSTCN in the Reported Value field and click the Save button. When you click the Save button, the Derived Value Overridden check box appears as selected for ModuleSubject.COSTCN. The Extract Data pages also display the sequence number of the step that derives the field value. The (GBR) HESA Field Derivation appendix in this PeopleBook describes the steps that the Creates Extract process performs to derive field values.

You can review only the most recent data for a particular return. When you run the Create Extract process, the system automatically deletes any data previously generated for a return.

Null Error check box on the Instance Extract Data page

The Create Extract process selects this check box if any field in the student's extract data has a NULL ERROR value. The Null Error check box is applicable for only Student return.

Creating an XML Return File

Access the HESA Extract XML page (Records and Enrollment, HESA Reporting, Extract Processing, Create XML).

HESA Extract XML

Run Control ID: student0809

Report Manager

Process Monitor

Run

Process Parameters

*Academic Institution:

PSUNV

PeopleSoft University

*Return Name:

return0809

*XML Path/File Name:

\\PLE-DMSITH3\return\student0809.xml

HESA Extract XML page

After you review the return data using the Extract Data pages, use the HESA Extract XML page to run the Create XML File process.

Return Name	Enter the return that you want to process.
XML Path/File Name	Enter the file path and file name that you want the system to use to save the XML file. You must enter a valid directory path that maps to a folder with appropriate Read/Write permission. If you cannot locate such a folder, consult your system administrator.

After running the process, you can use the View Log/Trace page to download the generated XML file to your local machine.

Validating an XML Return File

Access the HESA Validate XML page (Records and Enrollment, HESA Reporting, Extract Processing, Validate XML).

Validate XML

Run Control ID: NG01

[Report Manager](#) [Process Monitor](#) [Run](#)

Process Parameters

XML Path/File Name: \\\PLE-DSMITH\return\student0809.xml

Add Attachment

XSD Path/File Name: \\\PLE-DSMITH\temp\validate0909.xsd

Add Attachment

HESA Validate XML page

Run the HESA Validate XML process to validate the XML file generated by the Create XML File process. After you run the HESA Validate XML process, refer to the log file to check for any validation errors.

XML Path/File Name	Enter the path and file name of the XML file that you want to validate.
Add Attachment	Click to browse to the XML file that you want to validate. You can browse your local drive and select a file. Note. The upload process creates a files subdirectory to store and process the XML file. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.
XSD Path/File Name	Enter the complete path and file name of the XSD file. The process uses the XSD file to validate your XML file. The XSD file is available from the HESA website. Note. You must place the two related XSD files for CodeLists and DataTypes in the same directory as the XSD file being used for the XML validation. For example, if C08051.xsd is being used to validate the XML file and you have stored the C08051.xsd in /bur/hesa/psoft/shared/, then you must place C08051DataTypes.xsd and C08051CodeLists.xsd in the same directory /bur/hesa/psoft/shared/ because C08051.xsd references these two files.

Add Attachment

Click to browse to the XSD file. You can browse your local drive and select a file.

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

Chapter 53

(NZL) Generating Government Reports

This chapter provides an overview of New Zealand government reports and discusses how to:

- Process Single Data Return (SDR) extracts.
- Run New Zealand Qualifications Authority (NZQA) reports.
- Generate the Graduation Destination Survey data file.

Understanding New Zealand Government Reports

This section discusses:

- The SDR process.
- NZQA reports.
- The Graduation Destination Survey report.

The SDR Process

Use the Single Data Return SQR process (SRSDRNZL) to create the SDR report for the New Zealand Ministry of Education (MoE). The SDR consists of five separate data files:

- **Student File:** This file contains records for individual students who are enrolled in a course or program in the current year and have not received a complete refund of tuition fees.

All students who are enrolled in courses or programs should be reported, regardless of the level of study or the funding source. Every student in the course enrollment file should appear once in the student file.

- **Course Enrollment File:** This file contains records for each course enrollment instance.

For each individual student, a record of each separate course enrollment is required. All valid enrollments should be reported, regardless of the level of study or the funding source. Every student in the student file should appear at least once in the course enrollment file—a student who is enrolled in two or more courses will have two or more rows in the course enrollment file, but only one row in the student file.

- **Course Register file:** This file contains records for all courses in which students are enrolled in the current year.

Every unique course in the course enrollment file should appear in the course register file.

- **Qualification Completion file:** This file contains records for individual students who have passed all of the academic requirements for a recognized qualification in the previous year.

Only students who are completing a formally recognized qualification should be included in the qualification completion file.

- **Course Completion file:** This file contains course enrollment records for all individual students who were enrolled in a recognized qualification during the previous year.

The file should include all courses for which these students were actively studying in the January to December period in the previous year. Only students who are enrolled in a formally recognized qualification should be included in the course completion file. All type D student course enrollments for the previous full year must be reported in June of the following year with the course outcome.

The MoE requires that your institution generate these SDR files on predefined dates—once a year for the Qualification Completion file, three times a year for the other three files. With the exception of the Qualification Completion file, these files provide a snapshot of student, course, and course enrollment data at a particular point in time.

The SQR process contains two sections. The first section of the process extracts the data fields that are required by the MoE and loads them into a work table for SDR. This work table is the record `SSR_SDR_EXTRACT`, and it serves as a temporary holding place for the data that you extract. The process extracts data for all four file types, but the type and number of records that are written to the work table depend on the parameters that are entered on the run control panel. The extract includes student data, enrollment data, course data, and qualification completion data from various parts of your PeopleSoft Campus Solutions system.

Because the data fields in each of the SDR files overlap, the SDR work table acts as a storage table for the extracted data of all the files. All the records are deleted from the work table prior to extraction. When the SDR process is run in final mode, the process additionally saves the Qualification Complete file and selected SDR fields in history tables.

The second section of the SQR generates the ASCII flat files using the data that is in the SDR work table. These ASCII flat files can be either the Student file, the Course Enrollment file, the Course Register file, or the Qualification Completion file.

NZQA Reports

The `NZQARPTS.sqr` report process produces three reports:

- **Hook On Request:** This report provides a listing of all students who have not previously been registered with NQF and have paid the 25.00 NZD Hook On fee.

The system selects students who do not have an NZQA ID in the system, have not previously been reported to the NQF (`SCC_PERSONL_NZL.SSR_NZQA_RPT_FLAG` is not Y), and who have paid the NQF Hook On fee.

When the process selects a student, the `SCC_PERSONL_NZL.SSR_NZQA_RPT_FLAG` is always set to Y.

The system produces the Personal Details file with one row per student and the SQR report (`NZQARPTS.lis`) listing the total number of students in the Hook On file.

- **US Results (Unit Standard Results):** This report includes unit standard results (complete or not completed) for students who have paid the per credit fees.

The system selects students who:

- Have a milestone flag (MLSTN_ATMPT.MILESTONE_COMPLETE) equal to Y or N.
- Have a reported flag (SSR_MLSTATM_NZL.REPORTED_FLAG) that is not Y.
- Have paid the associated fees.

The system produces the Results file with one row per student per unit standard, the Personal Details file with one row per student in the Results file, and the SQR Report (NZQARPTS.lis) listing a row for each unit standard (milestone) showing the NQF code, NQF credits for that code, and total number of credits reported for all students who have been reported in that unit standard.

- **NZDipBus (NZ Diploma in Business Results):** This part of the process is used to report paid NZQA exam results for the NZ Diploma in Business and for Advanced Vocational Awards. Exam results are determined by the grade in STDNT_ENRL. Milestones are not used for this process. The process selects students for this report by searching for payment of a specific exam fee (identified by an item type code specified on the NZQA Run Control page).

The system produces the Personal Details file and the Results file.

The Graduation Destination Survey Report

The Graduate Destination Report contains the following information:

- The NZVCC Institution code.
- Bio/Demo data on each student, including ethnicity and residency data.
- The NZVCC Qualification.
- The NZVCC Subject.

See Also

Chapter 18, "(NZL) Setting Up Government Reporting," page 455

Processing SDR Extracts

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

- Process SDR extracts.
- Suppress course offerings in the Course Enrollment and Course Completion files.

Understanding SDR Processing

The enrollment reporting for the SDR is based on course enrollments. In the PeopleSoft system you enroll in classes, not courses. Thus, you might have multiple classes for a particular course in a given term. The SDR extract, therefore, includes enrollments only in classes that are primary components.

Data that is specific to the SDR report is entered in the different enrollment components. While the system maintains data for all class enrollment records, the SDR process extracts data for only the enrollment records of primary components.

Page Used to Process Single Data Return Extracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SDR Extract NZL	SSR_SDR_EXTRACT	Records and Enrollment, Enrollment Reporting, SDR Reporting NZL, SDR Extract NZL, SDR Extract NZL	Process the SDR extracts for enrollment reporting to the New Zealand Ministry of Education.
SDR Course Suppression	SSR_SDR_CRSE_SUP	Records and Enrollment, Enrollment Reporting, SDR Reporting NZL, SDR Course Suppression, SDR Course Suppression	Identify the course offerings that you want to suppress in the Course Enrolment and Course Completion files.

Processing SDR Extracts

Access the SDR Extract NZL page (Records and Enrollment, Enrollment Reporting, SDR Reporting NZL, SDR Extract NZL, SDR Extract NZL).

SDR Extract NZL

Run Control ID: SDR

Report Manager

Process Monitor

Run

*Academic Institution:

PSNZL

Silver Fern University

*Extract Date:

18/08/2011

File Mode:

Review

Permanent Post Code:

HOME

Term Post Code:

HOME

☒ Qualification Completion File

Pop Selection

Selection Tool:

PS Query

Query Name:

NZL_SDR_EXTRACT_BASIC

Launch Query Manager

Preview Selection Results

*SDR Output Directory:

SDR Extract NZL page

- Extract Date

Enter the MoE-prescribed date for running the extract.
- File Mode

Select a value to indicate whether the process extracts the records in *Review* mode or *Final* mode. *Review* appears by default.

In *Review* mode, the process produces the SDR files. In *Final* mode, the process produces the SDR files and the Qualification Completion File is stored in the history table (PS_SSR_SDR_QC_HIST). Emplid, Extract Date, Permanent Post Code, Last School Attended, and Last School Year are also stored for use in subsequent SDR reporting in the PS_SSR_SDR_HISTORY table.
- Permanent Post Code and Term Post Code

You must enter a value in these fields for extract of the post codes in the Student files.

Pop Selection

The Pop Selection group box becomes available when you select the Qualification Completion File check box. *PS Query* is the only available Selection Tool. The Population Selection query is mandatory if the Qualification Completion File check box is selected.

The extract process uses the Population Selection query to identify records for the Qualification Completion extract.

If the Qualification Completion check box is not selected, the extract process selects all students awarded a degree.

Suppressing Course Offerings in the Course Enrollment and Course Completion Files

Access the SDR Course Suppression page (Records and Enrollment, Enrollment Reporting, SDR Reporting NZL, SDR Course Suppression, SDR Course Suppression).

SDR Course Suppression

Academic Institution:

PSNZL

Course ID:

000391

English Literature

Course Offering Nbr:

1

Catalog Nbr

1

Find | View All

First

1 of 1

Last

*Effective Date:

24/08/2011

*Effective Status:

Active

☒ Course Enrollment File

☐ Course Completion File

SDR Course Suppression page

- Course Enrollment File

If you select this check box, the course offering is suppressed during the extract of the Course Enrollment File.
- Course Completion File

If you select this check box, the course offering is suppressed during the extract of the Course Completion File.

Running NZQA Reports

Run the NZQARPTS SQR process to generate one of the three required NZQA reports.

This section discusses how to run the NZQA reports.

Page Used to Run the NZQA Reports

Page Name	Definition Name	Navigation	Usage
NZQA Reports	SSR_RUN_NZQA_RPTS	Records and Enrollment, Enrollment Reporting, NZQA Reports NZL, NZQA Reports	Select and run one of the NZQA reports.

Running the NZQA Reports

Access the NZQA Reports page (Records and Enrollment, Enrollment Reporting, NZQA Reports NZL, NZQA Reports).

NZQA Reports

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

Academic Institution:	PSNZL	Silver Fern University
Business Unit:	PSNZL	New Zealand University Bursar
Term:	0559	Summer Session - 2006
NZDipBus Exam Item Type:		
Fee Code:	HOOKON	New Zealand Hook On Fee
Address Usage:	SLCT ORD 2	Mailing, Work, Dorm, Home
Report Type:	NQF Hook On Request	
Personal Details File:	\MACHINE\TEMP\NZQPD.txt	
Results File:		
Credits File:		

NZQA Reports page

Term

If running the NZDipBus report, enter the term for which you are running the report.

NZDipBus Exam Item Type

If running the NZDipBus report, enter the item type used for the NZDipBus exam fee at your institution.

Fee Code	If running the Hook-On Request report, enter the fee code used for the Hook-On fee at your institution.
Address Usage	Select the address usage that the process should follow. The process uses this to determine which address to use for students included in the report.
Personal Details File	Enter the file path and file name that you want the system to use to save the Personal Detail file.
Results File	Enter the file path and file name that you want the system to use to save the Results file.
Credits File	Enter the file path and file name that you want the system to use to save the Credits file.

Generating the Graduation Destination Survey Data File

Use the SRUGDNZL SQR to generate the data file for the NZVCC graduation destination survey.

This section discusses how to run the NZVCC SQR.

Page Used to Generate the Graduation Destination Survey Data File

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
NZVCC Survey Data File	SSR_RUNCTL_UGDS_NZ	Records and Enrollment, Graduation, NZVCC Survey Data File NZL, NZVCC Survey Data File	Run the SQR to generate the NZVCC Survey Data file.

Running the NZVCC SQR

Access the NZVCC Survey Data File page (Records and Enrollment, Graduation, NZVCC Survey Data File NZL, NZVCC Survey Data File).

NZVCC Survey Data File

Run Control ID: NZVCC FILE

[Report Manager](#) [Process Monitor](#)

Run

*Academic Institution:

PSNZL



Silver Fern University

Academic Year:

2005

File Name:

NZVCC Survey Data File page

File Name

Enter the file path and name for the system to use to save the University Graduate Destinations Survey file.

Appendix A

(GBR) HESA Field Derivation

This chapter provides an overview of the Higher Education Statistics Agency (HESA) derivation steps and describes how Campus Solutions derives the field values for the HESA Student, ITT, DLHE, and Aggregate Offshore returns.

Understanding HESA Derivation Steps

Academic institutions submit the student-based statistical returns to HESA as an XML file. The XML file is composed of entities. Each entity, in turn, is composed of data fields. For example, the Institution entity in the student return 2009/10 has three data fields: INSTAPP, RECID, and UKPRN. The specifications for HESA returns are available from the HESA website. The specifications on the HESA website also include field validations and the valid field values for the various returns.

This chapter lists the:

- Campus Solution pages that the system uses to derive each field.
- Steps that the system performs to derive each field.

The chapter does not list the Constant and Default fields on the HESA Fields page that the system uses for derivation. However, it does note the step where the system uses a constant and default value for derivation. For information about the HESA Fields page, refer to the "(GBR) Managing HESA Returns" chapter in this PeopleBook.

The system performs a sequence of steps to derive a field. If the system finds a value in a certain step, it does not perform the next step. For example, the system performs the following steps to derive the Course.BITTM field value:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

If a constant value exists for Course.BITTM, then the system uses the constant value in the return and does not perform Step 2 and the remaining steps. If a constant value does not exist, the system performs the next step in the sequence, which Step 2. If the system is not able to derive the value after performing Steps 1 through 5, it performs the last step and sets the Course.BITTM value to *NULL ERROR* in the HESA return.

The last derivation step for most fields is to assign the value as *NULL ERROR* or *NULL*. If HESA requires a value for a field, the last derivation step is to assign the field a value of *NULL ERROR*. If HESA does not require a value for a field, the last derivation step is to assign the field a value of *NULL*. For example, if the system cannot derive a Course.FEQAIMC value, it sets the Course.FEQAIMC value as *NULL* because HESA does not require a value for Course.FEQAIMC for all Course entities.

We recommend that you use the Extract Data pages to review and correct all the values that are derived as *NULL ERROR* before submission to HESA. The "(GBR) Managing HESA Returns" chapter discusses the Extract Data pages.

In some cases, before executing the derivation steps, the system checks the Field Derivation Rule to determine whether a value should be derived. If a value is not required, the system sets the field value as *NULL*. For example, before performing the derivation steps for Course.BITTM, the system first checks whether:

- Country = Wales, Scotland, or Northern Ireland
- Course.REDUCEDC = 00, 01, or 04
- Course.TTCID = 1 or 2

The system starts performing the derivation steps for Course.BITTM only if all three conditions are met. If all three conditions are not met, the system derives the field value as *NULL*.

Note. To derive a field value, the system uses the most recent effective-dated record that falls on or before the end of the reporting period. Exceptions to this rule are noted in this chapter.

The following table lists the navigation paths for the pages mentioned throughout this chapter:

<i>Page</i>	<i>Navigation</i>
Program HESA Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program HESA Data
Program Offering/Year HESA	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program Offering/Year HESA
Plan HESA Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data
Plan Offering/Year HESA	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan Offering/Year HESA
Sub-Plan HESA	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan HESA
Sub-Plan Offering/Year HESA	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan Offering/Year HESA
HESA Module Data	Curriculum Management, Course Catalog, HESA Module Details
HESA Returns	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Returns

Page	Navigation
Student Program	Records and Enrollment, Career and Program Information, Student Program/Plan
HESA Instance Data	Records and Enrollment, Career and Program Information, HESA Instance Details, HESA Instance Data
Entry Profile Data	Records and Enrollment, Career and Program Information, HESA Instance Details, Entry Profile Data
HESA Action Reasons	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Action Reasons
HESA Types	Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Types
External System ID	Campus Community, Personal Information (Student), Identification (Student), External System ID
Person HESA Data	Campus Community, Personal Information, Add/Update a Person, Person HESA Data
Enter DLHE Survey (self-service)	Click the Enter Survey button on the Survey Management page (Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Management). Click the Enter DLHE Survey link on the Student Center page (Self Service, Student Center).
Survey Details	Click the Details button on the Survey Management page.

For information about these pages and how to generate HESA Returns, refer to the chapter "(GBR) Managing HESA Returns."

Note. This chapter describes the delivered functionality for deriving the HESA return fields. You can use the Institution Data Capture page to determine at which level you can enter data for field derivation. Refer to the Setting Up and Entering Data for HESA Reporting section of the "(GBR) Managing HESA Returns" chapter for more information about the Institution Data Capture page.

We recommend that you review the return type specification that is available from the HESA website for field descriptions, validations, and valid field values.

See <http://www.hesa.ac.uk>.

Student Record Return: Institution Entity

The Create Extract Application Engine (SSR_HE_DATA) process creates a single Institution entity. The Institution entity is composed of three fields.

Indicator for HEFCE Funding Approximations (INSTAPP)

Return: Student Record

Entity: Institution

Page Used:

Page	Page Element
HESA Returns	INSTAPP

Field Derivation Rule: If the country is England or Northern Ireland, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR*.

Record Type Indicator (RECID)

Return: Student Record

Entity: Institution

Pages Used:

Page	Page Element
Reporting Periods (Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods)	Record Year
Returns (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns)	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where YY is the final two digits of the Record Year (for example, 09 for 2009) and NNN is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR*.

For Student Return 2009/10, the Record ID must be 051 and the Record Year for the Reporting Period must be 2009. The correct Record ID and Record Year for Student Return 2009/10 are delivered with your system.

UK Provider Reference Number (UKPRN)

Return: Student Record

Entity: Institution

Page Used:

Page	Page Element
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR*.

Student Record Return: Course Entity

If you select the Include Course Entities check box on the Create Extract Data page, the Create Extract process creates Course entities based on the academic plans and academic subplans of the institution that are active and have been set up as eligible for reporting to HESA on the Plan HESA Data or the Sub-Plan HESA page.

If you select the Enable Sub-Plan Reporting check box on the HESA Returns page, the Create Extract process looks at both subplans and plans with the Report to HESA check box selected. If you did not select the Enable Sub-Plan Reporting check box on the HESA Returns page or if no subplan records are marked for reporting to HESA, then the extract process looks at only plan records for deriving the Course fields.

Note. You can specify an academic subplan, academic plan, or both on the Create Extract Data page to test the Create Extract process for a single plan or subplan. The process then uses the specified subplan or plan to create the Course entities. You must select the Enable Sub-Plan Reporting check box on the HESA Returns page if you want to specify a subplan on the Create Extract Data page.

If you have specified an academic career on the Create Extract Data page and no plan, the process includes only those plans that are related to the specified academic career either by looking at the Academic Career field on the Academic Plan Table page or by looking at the parent Academic Program settings (Academic Program field on the Academic Plan Table page and then Academic Career field on the Academic Program Table page).

If you have specified an academic career on the Create Extract Data page and no subplan, the process includes only those subplans whose parent Academic Plan is related to the Academic Career either directly (Academic Career field on the Academic Plan Table page) or by looking at the parent Academic Program settings (Academic Program field on the Academic Plan Table page, and then the Academic Career field on the Academic Program Table page).

If you have specified an academic plan on the Create Extract Data page and no subplan, the process includes only those subplans that are related to the specified plan by looking at the Academic Plan field on the Academic Sub-Plan Table page.

If you have selected the Null Errors Only check box for the Include Course Entities on the Create Extract Data page, the process selects distinct COURSEID values from the existing active Course extract data, where at least one field in the Course or Course Subject extract data has a Derived Value of *NULL ERROR*. The process then selects Course entity records for these COURSEIDs.

If you have selected the Validation Errors Only check box for the Include Course Entities, the process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct COURSEID values from the Validation Error staging table for rows where COURSEID is not blank and EMPLID is blank. The process selects Course entity records for these COURSEIDs. Finally, it deletes records from the Validation Error staging table where COURSEID is populated and EMPLID is blank.

Bilingual ITT Marker (BITTM)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	BITTM
Plan HESA Data	BITTM
Sub-Plan HESA	BITTM

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = Wales, Scotland, or Northern Ireland
- Course.REDUCEDC = 00, 01, or 04
- Course.TTCID = 1 or 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Closed Course (CLSDCRS)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	CLSDCRS
Plan HESA Data	CLSDCRS
Sub-Plan HESA	CLSDCRS

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = England
- Course.REDUCEDC = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as 0.

Collaborating Organization (COLLORG)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	COLLORG
Plan HESA Data	COLLORG

Page	Page Element
Sub-Plan HESA	COLLORG

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = England
- Course.REDUCEDC = 00
- Course.COURSEAIM does not equal D00, D01, D90, L00, L80, L90, or L91

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

General Qualification Aim of Course (COURSEAIM)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	COURSEAIM
Plan HESA Data	COURSEAIM
Sub-Plan HESA	COURSEAIM

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.

4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Course Identifier (COURSEID)

Return: Student Record

Entity: Course

Pages Used: None

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. If the Course entity is based on a subplan, derive from the Academic Sub-Plan Table record.
2. Derive from the Academic Plan Table record.

Course Title (CTITLE)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Plan HESA Data	Course Title
Sub-Plan HESA	HESA Course Title
Academic Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Academic Plan
Academic Sub-Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table)	Academic Subplan

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. If the Course entity is based on a subplan, derive from the Sub-Plan HESA page.

If the Course Title field does not have a value, use a combination of the plan and subplan descriptions from the Academic Plan Table and Academic Sub-Plan Table pages.

- Derive from the Plan HESA Data page.

If the Course Title field does not have a value, use the plan description from the Academic Plan Table page.

FE General Qualification Aim (FEQAIMC)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	FEQAIMC
Plan HESA Data	FEQAIMC
Sub-Plan HESA	FEQAIMC

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

- Use constant.
- If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
- Derive from the Plan HESA Data page.
- Derive from the Program HESA Data page.
- Use default.
- Derive as *NULL*.

Major Source of Funding (MSFUND)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	MSFUND
Plan HESA Data	MSFUND
Sub-Plan HESA	MSFUND

Field Derivation Rule: Derive a value if Course.REDUCEDC = 00, 01, 02, or 04. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

NHS Bursaries (NHSBURSARY)

Return: Student Record

Entity: Course

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	NHSBURSARY
Plan HESA Data	NHSBURSARY
Sub-Plan HESA	NHSBURSARY

Field Derivation Rule: Derive a value if Country = Northern Ireland, England or Wales and REDUCEDC = 00

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as Null Error.

Reduced Course Return Indicator (REDUCEDC)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	REDUCEDC
Plan HESA Data	REDUCEDC
Sub-Plan HESA	REDUCEDC

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Regulatory Body for Health and Social Care Students (REGBODY)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	REGBODY
Plan HESA Data	REGBODY
Sub-Plan HESA	REGBODY

Field Derivation Rule: Derive a value if the following conditions are met:

- Course.COURSEAIM = M16, M26, M76, M86, H16, H76, I16, I76, J26, or J76
- Course.REDUCEDC = 00 or 01

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Subject Knowledge Enhancement Units (SKEUNITS)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	SKEUNITS
Plan HESA Data	SKEUNITS
Sub-Plan HESA	SKEUNITS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as Null Error.

Subject Knowledge Enhancement Placement (SKEOS)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	SKEOS
Plan HESA Data	SKEOS
Sub-Plan HESA	SKEOS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as Null Error.

Teaching Qualification Sought Sector (TQSSEC)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	TQSSEC
Plan HESA Data	TQSSEC
Sub-Plan HESA	TQSSEC

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland or Northern Ireland

- Course.REDUCEDC = 00
- Course.TTCID = 1 or 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Teaching Qualification Sought Subject (TQSSUB)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	TQSSUB,TQSSUB2,TQSSUB3
Plan HESA Data	TQSSUB,TQSSUB2,TQSSUB3
Sub-Plan HESA	TQSSUB, TQSSUB2, TQSSUB3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Course.REDUCEDC = 00
- Course.TQSSEC = 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant to create a single TQSSUB field.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.

5. Use default to create a single TQSSUB field.
6. Derive a single TQSSUB field as *Null Error*.

Note. The system can derive up to three values. Each of the values is included as a separate TQSSUB field in the XML file.

Teacher Training Course (TTCID)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	TTCID
Plan HESA Data	TTCID
Sub-Plan HESA	TTCID

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland or Scotland AND Course.REDUCEDC = 00, 01, 04, 06 or 07
- Country = Wales AND Course.COURSEAIM does not begin with P, Q, R, S or X AND Course.REDUCEDC = 00, 01, 04, 06 or 07

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Student Record Return: Course Subject Entity

If you select the Include Course Entities check box on the Create Extract Data page, the Create Extract process creates Course Subject entity records for each Course entity. The process can create a maximum of three Course Subject entity records for each Course entity.

The derivation of Course Subject fields may vary depending on whether the parent Course entity is based on a subplan or plan record.

Subject of ITT Specialism Indicator (ITT SUBJECT)

Return: Student Record

Entity: Course Subject

Pages Used:

Page	Page Element
Program HESA Data	HESA Subject ITT Subject Flag
Plan HESA Data	HESA Subject ITT Subject Flag
Sub-Plan HESA	HESA Subject ITT Subject Flag

Note. The system identifies a HESA subject as an ITT subject only if the ITT Subject Flag check box is selected for the HESA subject.

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.TTCID = 1 or 8

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Subject of Course (SBJCA)

Return: Student Record

Entity: Course Subject

Pages Used:

Page	Page Element
Program HESA Data	HESA Subject
Plan HESA Data	HESA Subject
Sub-Plan HESA	HESA Subject

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Subject Percentage (SBJPCNT)

Return: Student Record

Entity: Course Subject

Pages Used:

Page	Page Element
Program HESA Data	HESA Subject Percentage
Plan HESA Data	HESA Subject Percentage
Sub-Plan HESA	HESA Subject Percentage

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Student Record Return: Module Entity

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process creates the Module entities. To create Module entities, the process uses the institution's Course Offering records that are active and have been set up as eligible for reporting to HESA. You must select the Report to HESA check box on the HESA Module Data page to make a course offering record eligible for HESA reporting.

If HESA Module Data records do not exist, the process does not include the course offerings in the Module entity. The process includes dummy modules in the module entity.

Note. When you run the Create Extract process, you can choose to enter the course ID or course offering number as a run parameter for testing purposes. The Create Extract process then uses the specified course ID or course offering number to create the Module entities.

If you have selected an academic career and no course offering on the Create Extract Data page, then the process selects only those course offerings that are related to the selected career.

If you have selected the Null Errors Only check box for the Include Module Entities on the Create Extract Data page, the Create Extract process selects distinct MODID values from the existing active Module extract data, where at least one field in the Module or Module Subject extract data has a Derived Value of *NULL ERROR*. The process then selects Module entity records for these MODIDs.

If you have selected the Validation Errors Only check box for the Include Module Entities, the Create Extract process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct MODID values from the Validation Error staging table for rows where MODID is not blank and EMPLID is blank. The process selects Module entity records for these MODIDs. Note that the File Parser process removes the leading zeroes from MODID, therefore, the comparison of MODID with Course ID and Course Offering Number includes the logic to correctly match the values. The system makes an assumption that the Course Offering Number is a single digit. Finally, the Create Extract process deletes records from the Validation Error staging table where MODID is populated and EMPLID is blank.

Credit Value of Module (CRDTPTS)

Return: Student Record

Entity: Module

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	CRDTPTS
Catalog Data (Curriculum Management, Course Catalog, Catalog Data)	Maximum Units, Academic Progress Units, Enrollment Unit Load Calc Type

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Select the Course Catalog record for the Course ID. If the Enrollment Unit Load Calc Type value is *Academic Progress Units*, derive from the Academic Progress Units value. If the Enrollment Unit Load Calc Type value is any other value, derive from the Maximum Units value. Round off the fractional values to the nearest whole number. This step is not performed for dummy modules.
4. Use default.
5. Derive as *NULL ERROR*.

Credit Transfer Scheme (CRDTSCM)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	CRDTSCM

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Module FTE (FTE)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	FTE

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Level of Credit Points (LEVLPTS)

Return: Student Record

Entity: Module

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	LEVLPTS

Field Derivation Rule: If Module.CRDTPTS does not equal 999, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Module Identifier (MODID)

Return: Student Record

Entity: Module

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	Course ID Course Offering Nbr

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Derive as combination of Course ID plus Course Offering Number (CRSE_ID and CRSE_OFFER_NBR column values from PS_CRSE_OFFER). For example, if Course ID = 001248 and Offering Number = 2, then MODID = 0012482.

Module Taught in a Celtic Language (MODLANG)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	MODLANG

Field Derivation Rule: If Country = Northern Ireland, Scotland, or Wales, derive a value. Otherwise, derive as NULL

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Module Title (MTITLE)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	Short description that appears on the right of Course ID page element
HESA Dummy Module Data	Year

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.

2. Derive from the HESA Module Data page for standard modules. If short description is unavailable on the HESA Module Data page, derive as the description of the parent Course Catalog record.

For dummy modules, the MTITLE is derived as a combination of the Plan description, the text *Year*, and the year value of the dummy module record separated by spaces. For example, for Academic Plan = BA ENG with description BA English and Year = 2, MTITLE is derived as *BA English Year 2*.

3. Use default.
4. Derive as *NULL ERROR*.

Percentage Not Taught By This Institution (PCOLAB)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	PCOLAB

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Other Institution Providing Teaching (TINST)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	TINST

Field Derivation Rule: If Module.PCOLAB is greater than zero, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.

2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Student Record Return: Module Subject Entity

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process creates a maximum of 16 Module Subject entity records for each Module entity. To create the Module Subject entity records, the process uses the subject records for each Module record. Each module subject is a combination of Cost Center and Subject. The Module HESA Data page ensures that each combination of Cost Center and Subject is unique and the total percentage equals 100.

If you have not defined subjects on the Module Subjects region of the HESA Module Data page, then the process creates a single Module Subject entity record. The process derives the values for each field within the entity using the constant or default value defined on the HESA Fields page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Fields). If a constant or default is not available, the process derives the value as *NULL ERROR*. Note that if you have defined a constant, the process does not examine any subjects defined on the HESA Module Data page (that is, the process does not execute derivation step 2 for the Module Subject fields).

Cost Centre (COSTCN)

Return: Student Record

Entity: Module Subject

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	Cost Centre

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.
4. Derive as *NULL ERROR*.

Subject of Module (MODSBJ)

Return: Student Record

Entity: Module Subject

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	Subject

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.
4. Derive as *NULL ERROR*.

Subject/Cost Centre Percentage (MODSBJP)

Return: Student Record

Entity: Module Subject

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Module Data	Percentage

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.
4. Derive as *NULL ERROR*.

Student Record Return: Student Entity

The Create Extract process creates a single Student entity for each student included in the Instance entity. However, it is possible for a student to have multiple distinct Instances for a particular return. In this case, only one Student entity will be created.

The process creates the Student entities only if the Include Student Entities check box is selected on the Create Extract Data page.

The process uses each distinct HESA unique student identifier (HUSID) to create a Student entity. The process also uses the student's EMPLID to link the HUSID with the person data to derive fields within the Student entity. The process creates the Student entity after creating all the other entities because of the dependency on values derived for the Course, Instance, and Entry Profile fields.

Date of Birth (BIRTHDTE)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Date of Birth

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Biographical Details page in the format YYYY-DD-MM.
2. Derive as *NULL* with ReasonForNull = 1.

Disability (DISABLE)

Return: Student Record

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	DISABLE
Impairment AUS (Campus Community, Personal Information, Health Information, Impairment AUS)	Type of Impairment
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Code

Field Derivation Rule: If the student has at least one Instance with REDUCEDI = 00, 01, 06 or 07, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Derive from the Person HESA Data page.

2. If the student has multiple impairment records in the Impairment AUS page, derive as *08* (multiple disabilities). If the student has a single impairment record, use the HESA Disability code from the mapping between the impairment type and the HESA disability code.
3. Use default.
4. Derive as *NULL ERROR*.

You can define a default as either *00* (no known disability) or *99* (not known).

Ethnicity (ETHNIC)

Return: Student Record

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	ETHNIC
Ethnicity (Campus Community , Personal Information (Student), Biographical (Student), Personal Attributes, Ethnicity)	Regulatory Region, Ethnic Group
Ethnicity (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Ethnicity)	HESA Ethnic Code
Country Description (Set Up HRMS, Install, Country Table, Country Description) See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i> , "Integrating Campus Solutions with Human Capital Management."	2-Char Country Code

Field Derivation Rule: Derive a value if the following conditions are met:

- Student has at least one Instance with REDUCED = 00, 01, 06 or 07.
- One of the following is true (a, b, or c):
 1. Student has a related Entry Profile in the extract with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM.
 2. Student has a HESA Entry Profile record with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM. All student records are considered, based on EMPLID, irrespective of effective date or career/instance.
 3. Student has a Residency Self-Report record where Country = GBR or the mapped 2-character country code is XF, XG, XH, XI, XK, XL, GG, JE, or IM. All student records are considered, based on EMPLID, irrespective of effective date.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select Person Ethnicity records as follows:
 - If a single record exists, use that record.
 - If multiple records exist and one is marked as Primary on the Campus Community Ethnicity page, use that record.
 - If multiple records exist and none are marked as Primary, select the record with the highest Percentage defined in the Ethnicity Detail page.
 - If multiple records are indistinguishable, select the lowest alphabetic Ethnic Group code.
 - For the selected record, use the HESA Ethnic code from the mapping between the Ethnic Group, Regulatory Region, and the HESA Ethnic code. If no mapping exists, log an error message and skip to next step.
3. Use default.
4. Derive as *NULL ERROR*.

Forenames (FNAMES)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	First Name Middle Name

Field Derivation Rule: If a student has at least one Instance with REDUCED = 00, 01, or 04, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use the First Name and Middle Name values from the Primary Name record.
2. Derive as *NULL* with ReasonForNull = 9.

Gender (GENDER)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Gender

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Gender value from the Biographical History record.

If the gender value is Male, derive as 1.

If the gender value is Female, derive as 2.

If the gender value is unknown, derive as 9.

2. Use default.

3. Derive as *NULL ERROR*.

HESA Unique Student Identifier (HUSID)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Select External System ID records for the person with the External ID Type defined for HUSID in the HESA Types page.

Validate that the derived value is in the correct format (refer to the Notes section for HUSID available on the HESA website). If the value is invalid, log an error message.

Nationality (NATION)

Return: Student Record

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	NATION
Citizenship and Passport (Campus Community , Personal Information (Student), Identification (Student), Citizenship, Citizenship and Passport)	Country
Nationality (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality)	HESA Nationality Code

Field Derivation Rule: Derive a value if Country = England, Scotland or Wales. Otherwise, derive as NULL.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select person citizenship records and retrieve the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL). If a mapping exists in the HESA Nationality Code page for the Campus Solutions Country code, use the mapped HESA value else use the COUNTRY_2CHAR value.

If a single record exists, derive the Campus Solutions country code or HESA country code.

3. If multiple person citizenship records are found and a record has a value of *GB*, derive as *GB*.
4. If multiple records are found, and none have the *GB* country value but a minimum one record has a country value that is marked as European Union (EU) country then derive the EU country. If there are multiple EU countries report the one with the lowest alphabetic HESA code. Note that the PS_COUNTRY_TBL contains an indicator (EU_MEMBER_STATE) to specify if the country is a member of the EU.
5. If multiple records are found and none have the UK or EU value, select the lowest alphabetic code
6. Use default.
7. If the student has at least one Instance with REDUCEDI = 00 or 03 and COMDATE on or after 2007-08-01, derive as *NULL ERROR* else derive as *NULL*.

In most cases, you can use the Campus Solutions two-character country code to report the NATION value. However, some Campus Solutions country codes are not valid for HESA reporting. For example, the Campus Solutions Cyprus code (CY) cannot be reported. Cyprus has to be reported as *XA*, *XB*, or *XC*. In these cases, you must use the Nationality code mapping page to ensure the correct NATION values are reported to HESA.

National Identity (NATIOND)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Person HESA Data	NATIOND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Wales
- Student has at least one Instance with REDUCEDI = 00 or 02
- One of the following is true (a, b, or c):
 1. Student has a related EntryProfile in the extract with DOMICILE = XI (Wales)
 2. Student has any HESA Entry Profile record with DOMICILE = XI. Consider all records for the student (based on EMPLID), irrespective of effective date or career/instance.
 3. Student has any Residency Self-Report record where country = GBR and the combination of Country and State is mapped to a HESA Country Code = XI in the UCAS Area of Permanent Residence page. Consider all records for the student (based on EMPLID), irrespective of effective date.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default
3. Derive as *NULL ERROR*.

Institution's Own Identifier for Student (OWNSTU)

Return: Student Record

Entity: Student

Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Derive as EMPLID.

Note. Although the OWNSTU field is optional for HESA reporting, the system derives this field value for all students to assist with record identification.

Scottish Candidate Number (SCN)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Student has an Instance related to a Course entity that has Course.COURSEAIM beginning with H, I, J, C, P, Q, R, or S
- Either EntryProfile.UCASAPPID exists or Country = Scotland

EntryProfile.UCASAPPID exists if one of the following is found:

- Student has an Entry Profile in the extract with EntryProfile.UCASAPPID not null
- Student has a HESA Entry Profile record with EntryProfile.UCASAPPID not null
- A non-null External Application Number exists in the Campus Solutions admission application record and this record is related to the student program record for an Instance being reported for the student.
- One of the following is true (a, b, or c):
 1. Student has a related EntryProfile in the extract with EntryProfile.DOMICILE = XH (Scotland).
 2. Student has any HESA Entry Profile record with EntryProfile.DOMICILE = XH. Consider all records for the student (based on EMPLID) irrespective of effective date or career/instance.
 3. Student has any Residency Self-Report record where the country = XH. Or the student has any Residency Self-Report record where the country = GBR and the combination of Country and State is mapped to a HESA Country Code = XH in the UCAS Area of Permanent Residence page. Consider all records for the student (based on EMPLID) irrespective of effective date.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for SCN in the HESA Types page. Value should not be 999999999.
2. Derive as *NULL* with ReasonForNull = 1.

Dependants in Reporting Year (SDEPEND)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Person HESA Data	SDEPEND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Student has at least one Instance with REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Family Name on 16th Birthday (SNAME16)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note. The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record. The last name must have a Type of Name value that corresponds with the Name Type set for SNAME16 in the HESA Types page.
2. Derive as *NULL*.

Family Name (SURNAME)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note. The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: If the student has at least one Instance with REDUCEDI = 00, 01, or 04 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use the Last Name value from the Primary Name record.
2. Derive as *NULL ERROR*.

Term-time Accommodation (TTACCOM)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Person HESA Data	TTACCOM

Field Derivation Rule: Derive a value if the following conditions are met:

- The student has at least one Instance with REDUCEDI = 00
- LOCSDY does not equal S
- MODE = 01, 02, 23, 24, or 25

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default
3. Derive as *NULL ERROR*.

Term-time Postcode (TTPCODE)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Person HESA Data	TTPCODE

Page	Page Element
Addresses (Campus Community, Personal Information (Student), Biographical (Student), Addresses/Phones, Addresses)	Postal

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland, the student has at least one Instance with Instance.REDUCEDI = 00, 06 or 07, AND Instance.LOCSDY is null or does not equal 6, 9 D, F or S.
- Country = Wales, the student has at least one Instance with Instance.REDUCEDI = 00, 06 or 07, Instance.LOCSDY does not equal 6, 9, D, F or S, AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Derive as NULL if the conditions are not met.

Derivation Steps:

- Derive from the Person HESA Data page.
- Select the most recent address record (exclude records with an effective date greater than the end date of the reporting period) that has a country code of GBR. The record must have an Address Type that corresponds with the Address Type set for TTPCODE in the HESA Types page.
- Use default.
- Derive as *NULL* with ReasonForNull = 1.

For steps 1 and 2, the system validates that the derived post code value is in the correct format (refer to the examples for TTPCODE available on the HESA website).

UCAS Personal Identifier (UCASPERID)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- The student has an Instance with Instance.COMDATE after 2007-07-31 and
- Either EntryProfile.UCASAPPID value exists on the Entry Profile Data page (any effective-dated row) or the External Application Number associated with the Instance begins *UC*. Use the Student Program record of the instance to find the admission application number (ADM_APPL_NBR). Use this admission application number to find the Admissions Data record (PS_ADM_APPL_DATA). Then, from the Application Data page for this record, find the External Application Number. The External Application Number holds the UCAS Application Code plus Choice Number for a UCAS application.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for UCASPERID in the HESA Types page.
2. Derive as *NULL ERROR*.

Unique Learner Number (ULN)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for ULN in the HESA Types page.

Validate the derived value using the checksum method. For information on the checksum method, refer to the Notes section for the ULN field available on the HESA website.

2. Derive as *NULL*.

Welsh Speaker Indicator (WELSSP)

Return: Student Record

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Person HESA Data	WELSSP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Wales
- The student has an Instance with REDUCEDI = 00 or 02
- One of the following is true (a, b, or c):

- (a) The student has a related EntryProfile in the extract with DOMICILE = XI
- (b) The student has any HESA Entry Profile record with DOMICILE = XI. This includes consideration of all records for the student (based on EMPLID) irrespective of effective date or career/instance.
- (c) The student has any Residency Self-Report record where the country = GBR and the combination of Country and State is mapped to a HESA Country Code = XI in the UCAS Area of Permanent Residence page. This includes consideration of all records for the student (based on EMPLID) irrespective of effective date.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Person HESA Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Student Record Return: Instance Entity

If you select the Include Student Entities check box on the Create Extract Data page, the Create Extract process creates Instance entities based on distinct student careers and the related HESA Instance data.

The process includes a student career as an Instance entity if the following three conditions are met:

- The process has included the plan (or the subplan if the subplan rather than the plan is being reported) of the student program record as a Course entity in the extract. Note that if the student has multiple active plans the process considers the plan defined in the HESA Instance record.
- A related HESA Instance Data record exists for the career and academic institution with the Report To HESA check box selected.
- The student must be a *continuing student* (that is, the derived commencement date is prior to the start of the reporting period) or a *new student* (that is, the derived commencement date falls on or after the start of the reporting period).

If the student is a *continuing student*, then one of the following conditions must be satisfied:

- The student is in the HIN Population. That is, a HIN Population Year value exists in the HESA Instance Data record that matches the Reporting Period Year.

- You have not selected the HIN Population Only check box and the student has not left or completed prior to the reporting period. To determine whether the student has not left or completed prior to the reporting period, the process first selects the Student Program record that has an effective date nearest to the Reporting Period Start Date. Then, it checks whether the selected record has a Program Status that matches one of the eligible Program Statuses defined for the return on the HESA Returns page.

Note. If you have selected the check box, for each student career, the process only evaluates whether the first condition is met (that is, student is in the HIN population) and does not evaluate the second condition (that is, the student has not left or completed prior to the reporting period). In other words, if you select the check box and if the first condition is not met, the student career is not included.

If the student is a *new student*, then one of the following conditions must be satisfied:

- The student is in the HIN Population.
- The student has been term activated for at least one term that begins within the reporting period and the student has at least one enrolled class related to that term.
- The student has an FTE of greater than zero for the reporting period.

Note. The HIN Population Year value in the HESA Instance Data record may not exist for new students. Therefore, the process does not consider the HIN Population Only check box for selection of new students. It includes a new student based on either the class enrollment condition or the FTE condition, if the student is not in the HIN population.

The Create Extract process uses the following fields set up on the HESA Instance Data page for a student career:

- Academic Plan: Indicates the plan to report if the student has multiple active plans.
- Linked Career and Linked Career Number: Indicates that the student instance is associated with another instance.
- Report To HESA: If the check box is cleared, the process does not include the instance data.
- Start Date of Instance: The system calculates a value but you can use this field to override the calculated value.
- HIN Population Year: Indicates the reporting year for which the system should include the Instance in the return. You must manually enter the HIN Population Year on the HESA Instance Data page or import the values using the Import HIN Target List process.
- Year of Course: Indicates the year of course the student is undertaking for reporting in Instance.YEARPRG. You must update this value for each subsequent reporting period when the student has progressed to the next year of the program.
- Year of Student: Indicates the number of years the student has been undertaking the program for reporting in Instance.YEARSTU. You must update this value for each subsequent reporting period when the student has progressed to the next year of the program.

The system does not automatically calculate the Year of Course and Year of Student values on the HESA Instance Data page. You must use the HESA Instance Data page to manually enter the Year of Course and Year of Student values.

The Create Extract process derives the fields relevant to further education (FE) students only if the Include FE check box is selected on the HESA Returns page. Although you can include or exclude individual FE fields using the derived value for FESTUMK, the Include FE check box enables you to skip derivation of FE fields completely.

While creating Instance entities, the process checks if the student's External System ID records has a HUSID. If no records are found, the process creates a HUSID External System ID for the student with an Effective Date of the reporting period start date.

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the Create Extract process selects distinct EMPLIDs from the existing active extract data, where at least one field in the Instance, EntryProfile, QualificationsOnEntry, QualificationsAwarded, RAEDData, StudentOnModule or Student extract data has a derived value of *NULL ERROR*. The process then selects all the Instance entity records for these EMPLIDs (if an EMPLID has multiple instances and if at least one instance has a *NULL ERROR*, then all the instances are selected).

If you have selected the Validation Errors Only check box for the Include Student Entities, the Create Extract process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct EMPLIDs from the Validation Error staging table where the EMPLID is not blank. The process selects Instance entity records for these EMPLIDs. Finally, the process deletes records from the Validation Error staging table where EMPLID is populated.

Additional Support Cost (ADDSUPCT)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	ADDSUPCT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Foundation Degree to Degree Bridging Course (BRIDGE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	BRIDGE
Plan HESA Data	BRIDGE
Sub-Plan HESA	BRIDGE

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00.
- Country = Wales, REDUCEDI = 00, AND COURSEAIM does not begin with P, Q, R, S or X.

Derivation Steps:

1. Use constant.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Campus Identifier (CAMPID)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Campus
Campus (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Campus)	HESA Campus

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Use the mapping to derive the HESA Campus code for the Campus value entered in the Student Program page.
3. Use default.
4. Derive as *NULL ERROR*.

Completion Status (CSTAT)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	CSTAT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00, 01, or 02

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Start Date of Instance (COMDATE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	Start Date of Instance Effective Date

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive as the Start Date of Instance from the HESA Instance Data page.
2. Use the following process to calculate the earliest class start date for enrolled classes related to the Instance being reported. This selection is similar to that done for StudentOnModule except that it is not restricted to classes overlapping the reporting period and considers enrollments for linked careers.
 - a. Select all activated terms for the student career of the Instance.
 - b. From each activated term, select classes that satisfy the following conditions:
 - Status = *Enrolled*
 - Units Taken value is greater than zero.
 - Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Extract check box selected on the HESA Configuration page.
 - Repeat Code value is null or does not match a value defined in the Repeat Code Exclusion region with the Extract check box selected on the HESA Configuration page.
 - If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then apply a further filter to the class enrollments. In such a case, select the class only if the program value of the enrollment record is NULL or matches one of the program values in the Student Program records for that career and career number.
 - c. If the Instance has been linked to a prior student career using the Linked Career and Linked Career Number fields in the HESA Instance record, then also consider classes for the previous career.
 - d. Derive the earliest Class Start Date from all the selected classes as COMDATE.
3. The earliest Effective Date of the HESA Instance Data records.

For steps 2 and 3, the system stores the derived date as the Start Date of Instance value in the HESA Instance record.

Course Identifier (COURSEID)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. If the student's subplan is reported in the Course extract, derive from the student's subplan.
2. Derive from the student's plan.

Destination (DESTIN)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	DESTIN

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00, 01, or 02
- Course.COURSEAIM begins with P, Q, R, S or X.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Destination of Outward Credit Mobile Students (DESTOCM)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Program Year HESA Data group box)
Plan Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Sub-Plan Year Data group box)
HESA Instance Data	DESTOCM, DESTOCM2, DESTOCM3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Wales, or Northern Ireland
- Instance.REDUCEDI = 00
- (Instance.EXCHANGE = 7, B, C, D, or E) or (Instance.LOCSDY = F, G or S)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant to create a single DESTOCM field.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
5. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Use default to create a single DESTOCM field.
7. Derive a single DESTOCM field as *NULL ERROR*.

Note. The system can derive up to three values. Each of the values is included as a separate DESTOCM field in the XML file.

Department of Health Funding Body (DHFUND)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	DHFUND
Plan HESA Data	DHFUND
Sub-Plan HESA	DHFUND
HESA Instance Data	DHFUND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Related Course.MSFUND = 31

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Regulatory Body Reference Number (DHREGREF)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 01
- Related Course.REGBODY = 06 or 07

- Related Course.COURSEAIM = M16, M26, M76, M86, H16, H76, I16, I76, J26, or J76

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for DHREGREF in the HESA Types page.
2. Use default.
3. Derive as *NULL ERROR*.

You can define a default of 99999999 for this field.

Disabled Student Allowance (DISALL)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	DISALL
Impairment AUS (Campus Community, Personal Information, Health Information, Impairment AUS)	Support Services Request
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Allowance

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland, Instance.REDUCEDI = 00 AND Student.DISABLE = 02 to 96 inclusive.
- Country = Wales, Instance.REDUCEDI = 00, Student.DISABLE = 02 to 96 inclusive, AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If the student has a Support Services Request value defined on the Impairment AUS page, use the mapped HESA Disability Allowance code from the Disability page.
4. Use default.
5. Derive as *NULL ERROR*.

Note. The system derives Student.DISABLE before creating the Student entity in order to derive the Student.DISALL field.

Disadvantage Uplift Factor (DISUPFAC)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	DISUPFAC

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Eligibility for Disadvantaged Uplift (ELIDISUP)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	ELIDISUP

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Eligibility for Enhanced Funding (ELIGENFD)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	ELIGENFD

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Employer Role (EMPROLE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	EMPROLE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 02

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

End Date of Instance (ENDDATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason Effective Date
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the effective date of the record formatted to YYYY-MM-DD.
2. Derive as *NULL* with ReasonForNull attribute = 9.

Exchange Programmes (EXCHANGE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	EXCHANGE
Program Offering/Year HESA	EXCHANGE (Program Year HESA Data group box)
Plan HESA Data	EXCHANGE
Plan Offering/Year HESA	EXCHANGE(Plan Year HESA Data group box)
Sub-Plan HESA	EXCHANGE
Sub-Plan Offering/Year HESA	EXCHANGE (Sub-Plan Year HESA Data group box)
HESA Instance Data	EXCHANGE

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 or 03.
- Country = Wales, REDUCEDI = 00 or 03 AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Derive from the Plan HESA Data page.

7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Fee Eligibility (FEEELIG)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Residency Official 1 (Campus Community, Personal Information (Student), Identification (Student), Residency Data, Residency Official 1)	Residency
Program HESA Data	FEEELIG
Program Offering/Year HESA	FEEELIG (Program Offering HESA Data group box)
Plan HESA Data	FEEELIG
Plan Offering/Year HESA	FEEELIG (Plan Offering HESA Data group box)
Sub-Plan HESA	FEEELIG
Sub-Plan Offering/Year HESA	FEEELIG (Sub-Plan Offering HESA Data group box)
HESA Instance Data	FEEELIG
Fee Eligibility (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Fee Eligibility)	HESA Fee Eligibility

Field Derivation Rule: If Instance.REDUCEDI = 00 or 01 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Select the residency records for the EMPLID, institution, and academic career combination for the most recent effective term that starts on or before the end of the reporting period. Use the HESA Fee Eligibility code mapped to the selected residency value. If the mapping does not exist, log an error message and skip to the next step.
3. Derive from the HESA Instance Data page.

4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
5. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
6. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
7. Derive from the Plan HESA Data page.
8. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
9. Derive from the Program HESA Data page.
10. Use default.
11. Derive as *NULL ERROR*.

FE Student Marker (FESTUMK)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	FESTUMK
Plan HESA Data	FESTUMK
Sub-Plan HESA	FESTUMK
HESA Instance Data	FESTUMK
HESA Returns	Include FE

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- REDUCEDI is not 06 or 07

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive as 2 if Include FE check box is not selected on the HESA Returns page.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.

5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Franchise Partner (FRANPART)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FRANPART
Plan HESA Data	FRANPART
Sub-Plan HESA	FRANPART
HESA Instance Data	FRANPART

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 02

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Franchised Out Arrangements (FROUTARR)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FROUTARR
Plan HESA Data	FROUTARR
Sub-Plan HESA	FROUTARR
HESA Instance Data	FROUTARR

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

FTE Method (FTEMETHOD)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FTEMETHOD
Program Offering/Year HESA	FTEMETHOD (Program Offering HESA Data group box)
Plan HESA Data	FTEMETHOD
Plan Offering/Year HESA	FTEMETHOD (Plan Offering HESA Data group box)
Sub-Plan HESA	FTEMETHOD
Sub-Plan Offering/Year HESA	FTEMETHOD (Sub-Plan Offering HESA Data group box)
HESA Instance Data	FTEMETHOD

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Instance.REDUCEDI = 00, 01, or 03

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Fundability Code (FUNDCODE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FUNDCODE
Plan HESA Data	FUNDCODE
Sub-Plan HESA	FUNDCODE
HESA Instance Data	FUNDCODE

Field Derivation Rule: If Instance.REDUCEDI = 00 or 01, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Completion of Year of Instance (FUNDCOMP)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	FUNDCOMP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Wales, or Northern Ireland
- Instance.REDUCEDI = 00 or 01

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.

2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Level Applicable to Funding Council HESES (FUNDLEV)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FUNDLEV
Program Offering/Year HESA	FUNDLEV(Program Year HESA Data group box)
Plan HESA Data	FUNDLEV
Plan Offering/Year HESA	FUNDLEV (Plan Year HESA Data group box)
Sub-Plan HESA	FUNDLEV
Sub-Plan Offering/Year HESA	FUNDLEV (Sub-Plan Year HESA Data group box)
HESA Instance Data	FUNDLEV

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00 or 01

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Derive from the Plan HESA Data page.

7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Guided Learning Hours (GLHRS)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	GLHRS
Program Offering/Year HESA	GLHRS(Program Offering HESA Data group box)
Plan HESA Data	GLHRS
Plan Offering/Year HESA	GLHRS (Plan Offering HESA Data group box)
Sub-Plan HESA	GLHRS
Sub-Plan Offering/Year HESA	GLHRS (Sub-Plan Offering HESA Data group box)
HESA Instance Data	GLHRS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 02

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.

4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Government Initiatives (GOVINIT)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	GOVINIT
Plan HESA Data	GOVINIT
Sub-Plan HESA	GOVINIT
HESA Instance Data	GOVINIT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.

6. Use default.
7. Derive as *NULL ERROR*.

Implied Rate of Council Partial Funding (IMPRATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	IMPRATE
Program Offering/Year HESA	IMPRATE (Program Offering HESA Data group box)
Plan HESA Data	IMPRATE
Plan Offering/Year HESA	IMPRATE (Plan Offering HESA Data group box)
Sub-Plan HESA	IMPRATE
Sub-Plan Offering/Year HESA	IMPRATE (Sub-Plan Offering HESA Data group box)
HESA Instance Data	IMPRATE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00
- Related Course.MSFUND = 86, 87, 88, AA, AB, AC, or AD

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.

6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Institution's Own Campus Identifier (INSTCAMP)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Student Program	Campus
Campus (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Campus)	HESA Campus

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Use the mapping to derive the HESA Campus code for the Campus value entered in the Student Program page.
3. Use default.
4. If Country = Wales and Course.COURSEAIM = X41, X42, X43, X44, X45 or X46 then derive as *NULL ERROR*.
5. Derive as *NULL*.

Initiatives (INITIATIVES)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	INITIATIVES

Page	Page Element
Plan HESA Data	INITIATIVES
Sub-Plan HESA	INITIATIVES
HESA Instance Data	INITIATIVES

Field Derivation Rule: Derive a value if Country = England.

Derive as NULL if the condition is not met.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Derive as *NULL*.

ITT Phase/Scope (ITTPHSC)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	ITTPHSC
Plan HESA Data	ITTPHSC
Sub-Plan HESA	ITTPHSC
HESA Instance Data	ITTPHSC

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- Related Course.TTCID = 1, 2, 8, E or F
- Related Course.REDUCEDC = 00, 01, or 04, 06 or 07

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

ITT Schemes (ITTSCCHMS)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	ITTSCCHMS
Plan HESA Data	ITTSCCHMS
Sub-Plan HESA	ITTSCCHMS
HESA Instance Data	ITTSCCHMS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.REDUCEDI = 00, 01, or 04
- Related Course.TTCID = 1 or 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.

7. Derive as *NULL ERROR*.

Learning Difficulty (LEARNDIF)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	LEARNDIF

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

FTE in Year A (LOADYRA)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5
- Course.COURSEAIM does not begin D, L, P, Q, R, S or X

Derive as NULL if the conditions are not met.

Derivation Step:

Note. For this release, this field is derived as *Null Error* .

FTE in Year B (LOADYRB)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5
- Course.COURSEAIM does not begin D, L, P, Q, R, S or X

Derive as NULL if the conditions are not met.

Derivation Step:

Note. For this release, this field is derived as *Null Error* .

Location of Study (LOCSDY)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	LOCSDY
Program Offering/Year HESA	LOCSDY (Program Year HESA Data group box)
Plan HESA Data	LOCSDY
Plan Offering/Year HESA	LOCSDY (Plan Year HESA Data group box)
Sub-Plan HESA	LOCSDY
Sub-Plan Offering/Year HESA	LOCSDY (Sub-Plan Year HESA Data group box)

Page	Page Element
HESA Instance Data	LOCSDY

Field Derivation Rule: If Instance.REDUCEDI = 00 or 01 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Change of Mode Date (MCDATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason
HESA Instance Data	MCDATE
HESA Action Reasons	HESA Mode Direction (Change of Mode Mapping group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00

- Related Course.COURSEAIM begins with D, E, L, or M (excluding M22 and M26)
- Instance.MODE is not 63 or 64

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If MODE derivation step = 1 (that is derived from HESA Instance Data page), then derive MCDATE from HESA Instance Data page.
2. If MODE derivation step = 2 and the most recent record was selected to derive MODE, select any other earlier change of mode from the Student Program records where effective end date is within the reporting period.

For each record, determine from the Mode Direction mapping whether the MODE changed from Active to Inactive or vice versa.

If any one of the following three conditions is met, derive MCDATE as the effective date of the record that was used to derive MODE, formatted to YYYY-MM-DD:

- The earliest Mode Direction From = *Active* and the latest Mode Direction To = *Inactive*.
 - The earliest Mode Direction From = *Inactive* and the latest Mode Direction To = *Active*.
 - The earliest Mode Direction From = *Inactive*, the latest Mode Direction To = *Inactive*, and a minimum of one of the selected records for the reporting period has a Mode Direction To = *Active* (that is, student was active at some point).
3. Derive as *NULL* with ReasonForNull = 9.

Mode of Study (MODE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program Offering/Year HESA	MODE (Program Year HESA Data group box)
Plan Offering/Year HESA	MODE (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	MODE (Sub-Plan Year Data group box)
Student Program	Program Action Action Reason
Student Program	Acad Load
HESA Instance Data	MODE

Page	Page Element
Mode of Study (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Mode of Study)	HESA Mode of Study
HESA Action Reasons	Change of Mode Mapping
Term/Session Table (Set up SACR, Foundation Table, Term Setup, Term/Session Table)	Term
Enrollment Limit (Records and Enrollment, Student Term Information, Term Activate a Student, Enrollment Limit)	Approved Academic Load

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Select the Student Program record that has Program Action/Reason values mapped to a HESA Mode in the HESA Action Reasons page. Derive the mapped HESA mode value. If the derived value is 73 or 74 and the effective date of the record is prior to the reporting period start date, convert 73 to 63 and 74 to 64.
3. If Instance.COURSEID is based on a subplan, and the MODE value from the Sub-Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance equals 23,24, or 25 (sandwich placement year), then derive the Sub-Plan Offering/Year HESA MODE value.
4. If the MODE value from the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance equals 23,24, or 25, then derive the Plan Offering/Year HESA MODE value.
5. If the MODE Value from the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance equals 23,24, or 25, then derive the Program Offering/Year HESA MODE value.
6. Select the most recent activated student term record that overlaps the reporting period. That is, the process selects the record with the latest term begin date from terms where the term begin date or the term end date falls within the reporting period. Select the approved academic load from the most recent term record and use the mapping on the Mode of Study page to retrieve the corresponding HESA mode for the selected academic load.
7. Select the academic load from the Student Program record. Derive the mapped HESA code for the selected academic load from the Mode of Study page.
8. Derive as *NULL ERROR*.

Major Source of Tuition Fees (MSTUFEE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	MSTUFEE
Program Offering/Year HESA	MSTUFEE (Program Offering HESA Data group box)
Plan HESA Data	MSTUFEE
Plan Offering/Year HESA	MSTUFEE (Plan Offering HESA Data group box)
Sub-Plan HESA	MSTUFEE
Sub-Plan Offering/Year HESA	MSTUFEE (Sub-Plan Offering HESA Data group box)
HESA Instance Data	MSTUFEE

Field Derivation Rule: If Instance.REDUCEDI = 00, 01, or 02 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

NHS Employer (NHSEMP)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	NHSEMP
Plan HESA Data	NHSEMP
Sub-Plan HESA	NHSEMP
HESA Instance Data	NHSEMP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Related Course.COURSEAIM = M76, H76, I76, or J76

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Reason for Partial and Full Non-payment of Tuition (NONPAY)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	NONPAY

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England

- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00
- Course.MSFUND does not equal 91

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Suspension of Active Studies (NOTACT)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Student Program	Program Action Action Reason
HESA Instance Data	NOTACT
HESA Action Reasons	Suspension of Active Studies Mapping

Field Derivation Rule: If Instance.RSNEND and Instance.ENDDATE are NULL derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. If the most recent effective dated Student Program record has Program Action/Reason values mapped to the a HESA Suspension of Studies code on the HESA Action Reasons page, then derive the mapped HESA code value.
3. Derive as *NULL*.

Note. For correct derivation, ensure that if you have mapped a Program Action/Reason to a MODE of 73 or 74, map the same Program Action/Reason to a NOTACT value of 1 on the HESA Action Reasons page.

Number of Units to Achieve Full Qualification (NOUNTACH)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	NOUNTACH
Plan HESA Data	NOUNTACH
Sub-Plan HESA	NOUNTACH
HESA Instance Data	NOUNTACH

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Student Instance Identifier (NUMHUS)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	Instance Identifier Linked Career Linked Career Number Academic Career Student Career Nbr

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from HESA Instance Data page as Instance Identifier.
2. Derive from HESA Instance Data page as Linked Career and Linked Career Number.
3. Derive from HESA Instance Data page as Academic Career and Student Career Nbr, for example, UGRD1.

Number of Units Completed (NUMUNITS)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	NUMUNITS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Institution's Own Instance Identifier (OWNINST)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	OWNINST

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Use default.
3. Derive as *NULL*.

PhD Submission Date (PHDSUB)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason
HESA Instance Data	PHDSUB
HESA Action Reasons	Phd Submission Action Reason Mapping

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = D00 or D01

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance Data page.

2. Select the earliest Student Program record (exclude records with an effective date greater than the end date of the reporting period) that has Program Action/Reason values mapped in the Phd Submission Action Reason Mapping group box. Derive as the effective date of the record formatted to YYYY-MM-DD.
3. Derive as *NULL* with ReasonForNull = 9.

Good Standing Marker (PROGRESS)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	PROGRESS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 02

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Qualified Teacher Status (QTS)

Return: Student Record

Entity: Instance

Pages Used:

<i>Page</i>	<i>Page Element</i>
Program HESA Data	QTS

Page	Page Element
Plan HESA Data	QTS
Sub-Plan HESA	QTS
HESA Instance Data	QTS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00, 01, or 04
- Related Course.TTCID = 5

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Research Council Student Identifier (RCSTDID)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 04
- Instance.RCSTDNT is not 99

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for RCSTDID in the HESA Types page.
2. Derive as *NULL*.

Research Council Student (RCSTDNT)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	RCSTDNT
Plan HESA Data	RCSTDNT
Sub-Plan HESA	RCSTDNT
HESA Instance Data	RCSTDNT

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM begins D, E, L, or M (except M22 and M26)

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR*.

Amount of Tuition Fees Received/Expected for the Student (RECFEE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	RECFEE

Field Derivation Rule: Derive a value only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Reduced Instance Return Indicator (REDUCEDI)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	REDUCEDI

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Country = England, Scotland, or Northern Ireland and Instance.STULOAD is 10.0 or less, derive as 01.
4. If Country = England or Wales and Include FE = Y and Instance.FESTUMK = 4, derive as 02 .
5. If Instance.EXCHANGE is 2,4,8,9 or A, derive as 03.

6. If Instance.MODE = 63 or 64, derive as 04.
7. Derive as 00.

Reason for Ending Instance (RSNEND)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, 02, 04, 06 or 07
- Instance.ENDDATE is completed.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the mapped HESA code value.
2. Derive as *NULL ERROR*.

Number of Student Associates Scheme Days Completed (SASDAYS)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance Data	SASDAYS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 06 (SAS) or Course.TTCID = E (SAS)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Student Associates Scheme Placement (SASSCHL)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	SASSCHL

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 06 (SAS) or Course.TTCID = E (SAS)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Subject Knowledge Enhancement Institution (SKEITT)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	SKEITT

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Special Fee Indicator (SPECFEE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program Offering/Year HESA	SPECFEE (Program Year HESA Data group box)
Plan Offering/Year HESA	SPECFEE (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	SPECFEE (Sub-Plan Year HESA Data group box)
HESA Instance Data	SPECFEE

Field Derivation Rule: Derive if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00
- Instance.REDUCEDI = 00 AND Country = Wales AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.

5. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Use default.
7. Derive as *NULL ERROR*.

Expected Length of Study (SLENGTH)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	SLENGTH
Program Offering/Year HESA	SLENGTH (Program Offering HESA Data group box)
Plan HESA Data	SLENGTH
Plan Offering/Year HESA	SLENGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	SLENGTH
Sub-Plan Offering/Year HESA	SLENGTH (Sub-Plan Offering HESA Data group box)
HESA Instance Data	SLENGTH

Field Derivation Rule: If Instance.REDUCEDI = 00, 01, or 02 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.

10. Derive as *NULL* with ReasonForNull = 9 .

SLDD-Discrete Provision (ST13)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	ST13

Field Derivation Rule: Derive a value only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1 or 3
- Instance.REDUCEDI = 00

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Student Instance FTE (STULOAD)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	Calculated FTE Report Zero Override FTE

Field Derivation Rule: If Instance.REDUCEDI = 00, 01, 02, or 03, derive a value. Otherwise, derive as *NULL*.

Derivation Steps:

1. Derive as zero, if the Report Zero check box is selected on the HESA Instance Data page for the reporting period.
2. Derive as the Override FTE value on the HESA Instance Data page for the reporting period.
3. Derive as the Calculated FTE value on the HESA Instance Data page for the reporting period.
4. Use default.
5. Derive as *NULL ERROR*.

Teacher Reference Number (TREFNO)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Scotland, or Wales
- Instance.REDUCEDI = 00 or 04
- Related Course.TTCID = 1 or 8

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for TREFNO in the HESA Types page.
2. Use default.
3. Derive as *NULL*.

Type of Instance Year (TYPEYR)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	TYPEYR
Program Offering/Year HESA	TYPEYR (Program Year HESA Data group box)
Plan HESA Data	TYPEYR
Plan Offering/Year HESA	TYPEYR (Plan Year HESA Data group box)
Sub-Plan HESA	TYPEYR
Sub-Plan Offering/Year HESA	TYPEYR (Sub-Plan Year Data group box)
HESA Instance Data	TYPEYR

Field Derivation Rule: If Instance.REDUCEDI = 00 or 01 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Derive as 1 if Instance.COURSEID is based on a subplan, and a TYPEYR value of 1 is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. Derive as 2 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, and COMDATE is within the reporting period.
5. Derive as 3 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
6. Derive as 4 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.
7. Derive as 1 if Instance.COURSEID is based on a subplan and a TYPEYR value of 1 is defined on the Sub-Plan HESA page.
8. Derive as 2 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan HESA page, and COMDATE is within the reporting period.
9. Derive as 3 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan HESA page, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
10. Derive as 4 if Instance.COURSEID is based on a subplan, a TYPEYR value of 2, 3, 4, or 5 is defined on the Sub-Plan HESA page, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.

11. Derive as 1 if a TYPEYR value of 1 is defined on the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
12. Derive as 2 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, and COMDATE is within the reporting period.
13. Derive as 3 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
14. Derive as 4 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.
15. Derive as 1 if a TYPEYR value of 1 is defined on the Plan HESA Data page.
16. Derive as 2 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan HESA Data page, and COMDATE is within the reporting period.
17. Derive as 3 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan HESA Data page, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
18. Derive as 4 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Plan HESA Data page, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.
19. Derive as 1 if a TYPEYR value of 1 is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.
20. Derive as 2 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, and COMDATE is within the reporting period.
21. Derive as 3 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
22. Derive as 4 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.
23. Derive as 1 if a TYPEYR value of 1 is defined on the Program HESA Data page.
24. Derive as 2 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program HESA Data page and COMDATE is within the reporting period.
25. Derive as 3 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program HESA Data page, COMDATE is prior to the reporting period, and ENDDATE is null or not within the reporting period.
26. Derive as 4 if a TYPEYR value of 2, 3, 4, or 5 is defined on the Program HESA Data page, COMDATE is prior to the reporting period, and ENDDATE is within the reporting period.
27. Use default.
28. Derive as *NULL ERROR*.

The derivation logic can use the TYPEYR values of 3,4, or 5 set up for year, program, plan, or subplan. However, it is expected that only values 1 (Course academic year contained within the HESA reporting year 1 August - 31 July) or 2 (Course academic year not contained within the HESA reporting year 1 August - 31 July) are relevant because the remaining values of 3,4, and 5 apply to the student instance rather than the year as a whole.

The system repeats Steps 3 to 6, depending on the level at which the TYPEYR value is defined in the academic structure.

Units of Length (UNITLGTH)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	UNITLGTH
Program Offering/Year HESA	UNITLGTH (Program Offering HESA Data group box)
Plan HESA Data	UNITLGTH
Plan Offering/Year HESA	UNITLGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	UNITLGTH
Sub-Plan Offering/Year HESA	UNITLGTH (Sub-Plan Offering HESA Data group box)
HESA Instance Data	UNITLGTH

Field Derivation Rule: If Instance.REDUCEDI = 00, 01, or 02 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.

9. Use default.
10. Derive as *NULL ERROR*.

Length of Current Year of Instance (YEARLGTH)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	YEARLGTH
Program Offering/Year HESA	YEARLGTH (Program Year HESA Data group box)
Plan HESA Data	YEARLGTH
Plan Offering/Year HESA	YEARLGTH (Plan Year HESA Data group box)
Sub-Plan HESA	YEARLGTH
Sub-Plan Offering/Year HESA	YEARLGTH (Sub-Plan Year Data group box)
HESA Instance Data	YEARLGTH

Field Derivation Rule: Derive a value if one of the the following conditions is met:

- Country = Scotland AND Instance.REDUCEDI = 00.
- Country = Wales, Instance. REDUCEDI= 00 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Instance.LOCSDY = *D* or *F*, derive as *NULL* with ReasonForNull = 9.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.
5. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
6. Derive from the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.
7. Derive from the Plan HESA Data page.

8. Derive from the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.
9. Derive from the Program HESA Data page.
10. Use default.
11. Derive as *NULL ERROR*.

Year of Program (YEARPRG)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	Year of Program

Field Derivation Rule: Derive a value if one of the the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 or 01
- Country = Wales, Instance.REDUCEDI = 00 or 01 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Year of Student on This Instance (YEARSTU)

Return: Student Record

Entity: Instance

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Instance Data	Year of Student

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 or 01

- Country = Wales, Instance.REDUCEDI = 00 or 01 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derivation Steps:

- Derive from the HESA Instance Data page.
- Use default.
- Derive as *NULL ERROR*.

Student Record Return: Entry Profile Entity

If you select the Include Student Entities check box on the Create Extract Data page, the Create Extract process creates a Entry Profile entity. The process creates a Entry Profile entity for each Instance entity if either the Instance.COMDATE is within the reporting period or if the Include Entry Profile check box is selected on the Entry Profile Data page. The process creates a single Entry Profile entity using the same key structure as the Instance record.

Access Programmes (ACCESS)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	ACCESS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- EntryProfile.QUALENT2 = 44 or 45

Derive as NULL if the conditions are not met.

Derivation Steps:

- Use constant.
- Derive from the Entry Profile Data page.
- Use default.
- Derive as *NULL ERROR*.

Articulation (ARTICLN)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	ARTICLN

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Entry Profile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M22, M26, H00, H11, H16, H18, H22, H23, H24, I00, I11, or I16

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Domicile (DOMICILE)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	Page Element
Residency Self-Report (Campus Community, Personal Information (Student), Identification (Student), Residency Data, Residency Self-Report)	State Country
Entry Profile Data	DOMICILE
Nationality (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality)	HESA Domicile

Page	Page Element
Area of Permanent Residence (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Area of Permanent Residence)	HESA Code

Field Derivation Rule: Include for all Entry Profile entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Select the Residency Self-Report record with the latest Date Reported before the Instance.COMDATE. If no record is found, then select the record with the earliest Date Reported date on or after Instance.COMDATE.

If a Residency Self-Report record is found and the Country value is not *GBR*, retrieve the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL). If the mapping to a HESA Domicile exists on the Nationality page for the Campus Solutions country code, use the mapped HESA Domicile value; otherwise, use the COUNTRY_2CHAR value.

3. If the Residency Self-Report record is found, the Country value is *GBR*, and a State value exists, select the country and state values. If a mapping exists on the Area of Permanent Residence page between a HESA country code and the selected country and state values, use the mapped HESA Country code. If no mapping is found, log an error message and derive *XK*.
4. If a Residency Self-Report record is found, the Country value is *GBR*, and a State value does not exist, derive *XK*.
5. Use default.
6. Derive as *NULL ERROR*.

Note that some Campus Solutions country codes are invalid for HESA reporting. Use the Nationality page to map the valid HESA codes with the Campus Solutions country codes.

Marital Status (MARSTAT)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	Page Element
Biographical Details (Campus Community, Personal Information (Student), Add/Update Person, Biographical Details)	Marital Status
Entry Profile Data	MARSTAT

Page	Page Element
Marital Status (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Marital Status)	HESA Marital Status

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)
- Related Instance.REDUCEDI = 00 or 04

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Select the Marital Status value from the Biographical History record. Use the mapping on the Marital Status page to derive the HESA Martial Status code.
3. Derive as *NULL ERROR*.

New Entrant to Higher Education (NEWENT)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	NEWENT

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM begins with D, E, L, M, H, I, J, or C

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as *NULL* .

Dependents on Entry (NIDEPEND)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	NIDEPEND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)
- Related Instance.REDUCEDI = 00 or 04

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Parental Education (PARED)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	PARED

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Course.COURSEAIM = M22, M26, H00, H11, H16, H18, H22, H23, I00, I11, I16, J10, J16, J20, J26, J30, C20, or C30
- Related Instance.REDUCEDI = 00 or 04

- If Country = Northern Ireland or Wales, then EntryProfile.UCASAPPID is not null

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as *NULL ERROR*.

PGCE Class of Undergraduate Degree (PGCECLSS)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	PGCECLSS

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M71 or H71

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as *NULL ERROR*.

PGCE Subject of Undergraduate Degree (PGCESBJ)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	PGCESBJ PGCESBJ2 PGCESBJ3

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M71 or H71

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Use constant to create a single PGCESBJ field.
2. Derive from the Entry Profile Data page.
3. Use default to create a single PGCESBJ field.
4. Derive a single PGCESBJ field as *NULL ERROR*.

Note. The system can derive up to three values. Each of the values is included as a separate PGCESBJ field in the XML file.

Postcode (POSTCODE)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	Page Element
Addresses (Campus Community, Personal Information (Student), Biographical (Student), Addresses/Phones, Addresses)	Postal
Entry Profile Data	POSTCODE

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00 or 01

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Select the most recent address record that a country code of GBR. The record must have an address type that matches the address type mapped with POSTCODE in the HESA Types page. Derive the post code from this record.
3. Derive as *NULL* with ReasonForNull = 1.

For steps 1 and 2, the system validates that the derived post code value is in the correct format.

Last School Attended (PREVINST)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	PREVINST

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M22, M26, H00, H11, H16, H18, H22, H23, I00, I11, I16, J10, J16, J20, J26, J30, C20, or C30

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Highest Qualification On Entry (QVALENT2)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	QVALENT2

Field Derivation Rule:

Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, or 04
- Instance.COMDATE is before *01-AUG-2010*

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Highest Qualification On Entry (QVALENT3)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	QVALENT3

Field Derivation Rule:

Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 04
- Instance.COMDATE is on or after *01-AUG-2010*

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Religion (RELIGION)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	Page Element
Religious Preference (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Religious Preference)	Religious Preference
Entry Profile Data	RELIGION
Religion (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Religion)	HESA Religion

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)
- Related Instance.REDUCEDI = 00 or 04

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Select the religious preference from the personal information record. Use the mapping on the Religion page to derive the HESA Religion code.

If the HESA religion code mapping does not exist, log an error message and skip to the next step.

3. Use default.
4. Derive as *NULL ERROR*.

Socio-Economic Classification (SEC)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	SEC

Field Derivation Rule: Derive a value if the following conditions are met:

- A value for EntryProfile.UCASAPPID exists.
- EntryProfile.DOMICILE is XF, XG, XH, XI, XK, XL, GG, JE or IM

- Related Course.COURSEAIM begins with H, I, J, or C or is M22 or M26.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Occupation Code (SOC2000)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	SOC2000

Field Derivation Rule: Derive a value if the following conditions are met:

- A value for EntryProfile.UCASAPPID exists.
- EntryProfile.DOMICILE is XF, XG, XH, XI, XK, XL, GG, JE or IM
- Related Course.COURSEAIM begins with H, I, J, or C or is M22 or M26.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

UCAS Application Number (UCASAPPID)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Application Data (Student Admissions, Application Maintenance, Maintain Applications, Application Data)	External Application Nbr
Entry Profile Data	UCASAPPID

Field Derivation Rule: Include for all Entry Profile entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use the Student Program record of the instance to find the admission application number (ADM_APPL_NBR). Use this admission application number to find the Admissions Data record (PS_ADM_APPL_DATA). Then, from the Application Data page for this record, find the External Application Number. The External Application Number is used to record the UCAS Application Number or Application Code plus Choice Number for UCAS applications.

If the External Application Number is not null and is a UCAS number — that is, the number is a 4-character application code that begins *UC*, plus - , plus single-digit choice number (for example, UC01-1), then the system derives the UCAS number value minus the - and choice elements (for example, *UC01*). Only values beginning *UC* are derived. If any other value is found, the derivation step is skipped.

3. Use default.
4. Derive as *NULL*.

Welsh Baccalaureate Advanced Diploma (WELBACC)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile Data	WELBACC

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XI (Wales)
- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM begins with H, I, J or C (that is, not FE)

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.

2. Use default.
3. If Country is Wales in the HESA Returns page, derive as *NULL ERROR*.
4. If Country is not Wales in the HESA Returns page, derive as *NULL*.

Year Left Last Institution (YRLLINST)

Return: Student Record

Entity: Entry Profile

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	YRLLINST

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- EntryProfile.ARTICLN = 1, 2, 3, or 4

Derive as *NULL* if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Student Record Return: Qualifications On Entry Entity

The Create Extract process creates Qualifications On Entry entities for each Entry Profile entity in the return. The process creates the Qualifications On Entry entities only if the Include Student Entities check box is selected on the Create Extract Data page. To create the Qualifications On Entry entities, the process selects entry qualifications that have the Report To HESA check box selected and the QUALTYPE code imported from HESA.

Qualification Grade (QUALGRADE)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	Page Element
Entry Profile Data	Grade

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

The system performs the following steps to derive the values:

1. Derive from the Entry Profile Data page.
2. Derive as *NULL ERROR*.

Qualification Subject (QUALSBJ)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	Page Element
Entry Profile Data	Subject

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Derive as *NULL ERROR*.

Qualification Sitting (QUALSIT)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	Page Element
Entry Profile Data	Sitting

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.

2. Derive as *NULL ERROR*.

Qualification Type (QUALTYPE)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	Type

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Derive as *NULL ERROR*.

Qualification Year (QUALYEAR)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

<i>Page</i>	<i>Page Element</i>
Entry Profile Data	Year

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile Data page.
2. Derive as *NULL ERROR*.

Student Record Return: Qualifications Awarded Entity

The Create Extract process creates Qualifications Awarded entities for each Instance entity where the student has completed the course and the academic institution has awarded a qualification to the student. The process uses the HESA Instance Data record for field derivation. If a field value does not exist in the HESA Instance Data record, the process uses the student degree records for derivation.

The process creates the Qualifications Awarded entities only if the Include Student Entities check box is selected on the Create Extract Data page.

The process selects Qualifications Awarded records for Instance records that have Instance.ENDDATE = *not null*, Instance.RSNEND = *01* (successful completion of course), and Instance.REDUCEDI = *00,01* or *04* (not Reduced FE or Incoming Visiting/Exchange).

Classification (CLASS)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance Data	Classification(Qualifications Awarded group box)
Degree Honors (Records and Enrollment, Graduation, Student Degrees, Degree Honors)	Honors Code
Classification (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Classification)	Honors Code

Field Derivation Rule: Derive a value if one of the following conditions is met:

- QualificationsAwarded.QUAL = M22, M26, H00, H11, H16, H18, H22, H23, H24, H50, I00, I11, or I16
- Country = England or Wales AND QualificationsAwarded.QUAL begins P, Q, R, S or X

Derivation Steps:

1. If the entity is derived from the HESA Instance Data - Qualifications Awarded record, derive as the Classification value.
2. If the entity is derived from Student Degrees record, use the mapping on the Classification page to derive as the HESA Honors Code. On the Classification page the HESA Honors Code must be mapped to a HESA classification and a Honors Type where the Honors Type must be *Degree Honors*.
3. Derive as *NULL ERROR*.

Outcome of ITT Instance (OUTCOME)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance Data	Outcome of ITT Instance(Qualifications Awarded group box)
HESA Instance Data	OUTCOME (Instance HESA Data group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- Related Course.TTCID = 1 or 8

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance Data - Qualifications Awarded record, derive as the Outcome of ITT Instance value.
2. If the entity is derived from Student Degrees record, derive as the OUTCOME value.
3. Use default.
4. Derive as *NULL ERROR*.

Qualification Awarded (QUAL)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance Data	Qualification Awarded(Qualifications Awarded group box)
Degree (Records and Enrollment, Graduation, Student Degrees, Degree)	Degree
Qualification (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Qualification)	Degree

Field Derivation Rule: Include for all Qualifications Awarded entities.

Derivation Steps:

1. If the entity is derived from the HESA Instance Data - Qualifications Awarded record, derive as the Qualification Awarded value.
2. If the entity is derived from Student Degrees record, use the mapping on the Qualification page to derive as the mapped HESA Degree code.

3. Derive as *NULL ERROR*.

Teaching Qualifications Gained Sector (TQGSEC)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance Data	Sector(Qualifications Awarded group box)
HESA Instance Data	TQGSEC (Instance HESA Data group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland or Northern Ireland
- Related Course.TTCID = 1 or 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance Data - Qualifications Awarded record, derive as the Sector value.
2. If the entity is derived from Student Degrees record, derive as the TQGSEC value. If two awards are reported, use this value for both entities.
3. Use default.
4. Derive as *NULL ERROR*.

Teacher Qualification Gained Subject (TQGSUB)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance Data (Qualifications Awarded group box)	Subject 1,Subject 2,Subject 3
HESA Instance Data (Instance HESA Data group box)	TQGSUB,TQGSUB2, TQGSUB3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- QualificationsAwarded.TQGSEC = 2

Derive as NULL if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance Data - Qualifications Awarded record, derive as the Subject 1, Subject 2, and Subject 3 values.
2. If the entity is derived from Student Degrees record, derive as the TQGSUB, TQGSUB2, and TQGSUB3 values. Use these values for both entities if two awards are reported.
3. Derive single TQGSUB field as *NULL ERROR*.

Note. The system can derive up to three values. Each of the values is included as a separate TQGSUB field in the XML file.

Student Record Return: RAE Data Entity

The Create Extract process creates RAE Data entities for each Instance entity where the student is studying a research program and the academic institution is creating a full return for the student. The process :

- Selects RAE Data entities records for the related course records that have a research COURSEAIM = *L00, L80, L90, L99* or beginning with *D* and Instance.REDUCEDI = *00* (not a reduced return).
- Derives values from the HESA Instance - Research Data record. If values do not exist in the HESA Instance - Research Data record, then derives values from the Advisor HESA Data record for the student.
- Creates the RAE Data entities only if the Include Student Entities check box is selected as a run parameter for the Create Extract process.

For selecting a value from the Advisor HESA Data record, the process selects each student advisor record where:

- The Academic Career and Academic Program match the career and program of the Instance being reported.
- The Academic Advisor value is defined for the student.
- The Advisor Role defined matches one of the roles defined on the HESA Returns page.

If multiple advisors are found, the process selects the advisor with the lowest Advisor Number. The process then selects the Advisor HESA data for the selected advisor to derive the RAE Data fields.

RAE Unit of Assessment (OUA2008)

Return: Student Record

Entity: RAE Data

Pages Used:

Page	Page Element
HESA Instance Data	RAE Unit of Assessment
Advisor HESA Data (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Advisor HESA Data)	RAE Unit of Assessment
Student Advisor (Records and Enrollment, Student Background Information, Student Advisor)	Academic Advisor

Field Derivation Rule: Include for all RAE Data entities.

Derivation Steps:

1. If the entity is derived from Instance HESA Data - Research Data record, derive from the HESA Instance Data page.
2. If the entity is derived from Advisor HESA Data record, derive from the Advisor HESA Data page.

Unit of Assessment Percentage (UOAPCNT)

Return: Student Record

Entity: RAE Data

Pages Used:

Page	Page Element
HESA Instance Data	Unit Of Assessment Percentage
Advisor HESA Data (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Advisor HESA Data)	Unit Of Assessment Percentage
Student Advisor (Records and Enrollment, Student Background Information, Student Advisor)	Academic Advisor

Field Derivation Rule: Include for all RAE Data entities.

Derivation Steps:

1. If the entity is derived from Instance HESA Data - Research Data record, derive from the HESA Instance Data page.
2. If the entity is derived from Advisor HESA Data record, derive from the Advisor HESA Data page.

Student Record Return: Student On Module Entity

The Create Extract process can create a maximum of 128 Student On Module records for each Instance in the return to indicate which modules (Campus Solutions courses) the student has been studying during the reporting period. The process selects Student On Module records based on the student's course enrollments and the course offering records included in the related Module entities of the return.

The process creates the Student On Module entities only if the Include Student Entities check box is selected on the Create Extract Data page.

HESA requires Student On Module records only if Instance.STULOAD is greater than zero. However, academic institutions can optionally include Student On Module records in the return when STULOAD = 0.

To choose student enrollment records for the Student on Module entity creation, the process:

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

When the process considers class start and end dates for class enrollments where the Session = *OEE* (open entry/exit), rather than selecting the class start/end dates, the process selects the values from the Student OEE Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data then the process uses the class end date. The start date is mandatory for a Student OEE Enrollment Data record. Note that the process does not consider linked careers for Student On Module.

For students with a STULOAD value of greater than zero, if there are no relevant class enrolments, the process creates a single Student On Module entity for the student. The process creates the single Student On Module entity only if the combination of Plan and Year has been defined as a dummy module and included in the Module entity.

Percentage of Module Taught in Celtic Language (LANGPCNT)

Return: Student Record

Entity: StudentOnModule

Page Used:

Page	Page Element
HESA Module Data	LANGPCNT

Field Derivation Rule: If Country = Northern Ireland, Scotland, or Wales, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR*.

Module Identifier (MODID)

Return: Student Record

Entity: Student On Module

Pages Used: None

Field Derivation Rule: Include for all Student On Module entities.

Derivation Step:

1. For each student enrollment record valid for the reporting period, the process determines MODID as a combination of Course ID plus Course Offering Number from the related Course Offering record.

Module Countable (MODCOUNT)

Return: Student Record

Entity: Student On Module

Pages Used:

Page	Page Element
Module HESA Data	MODCOUNT

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Wales
- Course.COURSEAIM begins with C, D, E, L, M, H, I or J

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Module HESA Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Module Outcome (MODOUT)

Return: Student Record

Entity: Student On Module

Pages Used:

<i>Page</i>	<i>Page Element</i>
Enrollment (Records and Enrollment, Enroll Students, Enrollment)	Grading Basis Grade In/Official
Module Outcome (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Module Outcome)	HESA Module Outcome

Field Derivation Rule: Include for all Student On Module entities.

Derivation Steps:

1. Derive as the mapped HESA Module Outcome for the grade selected in the enrollment record.
2. Use default.
3. Derive as *NULL ERROR*.

If HESA Module Data dummy module flag for MODID = Y, derive as 07.

Module Status (MODSTAT)

Return: Student Record

Entity: Student On Module

Pages Used: None

Field Derivation Rule: Include for all Student On Module entities.

Derivation Steps:

1. Use constant.

2. Derive as 1 if the class start date is before the reporting period, and the class end date is within the reporting period.
3. Derive as 2 if the class start and end dates are within the reporting period.
4. Derive as 3 if the class start date is within the reporting period, and the class end date is after the reporting period.
5. Derive as 4 if the class end date is before the reporting period and MODOUT is not 6.
6. Derive as 6 if the class start date is before the reporting period and the class end date is after the reporting period.
7. Use default.
8. Derive as *NULL ERROR*.

Note that the derivation logic compares class start and end dates with the reporting period dates to determine the status.

If HESA Module Data dummy module flag for MODID = Y, derive as 05.

When considering class start and end dates for class enrollments where the Session = OEE, rather than selecting the class start and end dates, the derivation logic selects values from the Student OEE Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data record, then the logic uses the class end date. The start date is mandatory in the Student OEE Enrollment Data record.

Module Year (MODYR)

Return: Student Record

Entity: Student On Module

Page Used:

<i>Page</i>	<i>Page Element</i>
Module HESA Data	MODYR

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Derive from the Module HESA Data page.
2. Use default.
3. Derive as *NULL ERROR*.

For dummy modules:

1. Derive from the HESA Dummy Module Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Note: The field is only derived if INSTAPP = 1, therefore, usually this field will be null

Aggregate Offshore Return: Institution Entity

The Create Extract process creates a single entity record for the institution with the RECID and UKRPN fields.

Record Type Indicator (RECID)

Return: Aggregate Offshore

Entity: Institution

Pages Used:

<i>Page</i>	<i>Page Element</i>
Reporting Period	Record Year
Returns	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where YY is the final two digits of the Record Year (for example, 09 for 2009) and NNN is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR*.

For Aggregate Offshore Return, the Record ID must be 052. The Record ID is delivered with CS 9.0 bundle 12.

UK Provider Reference Number (UKPRN)

Return: Aggregate Offshore

Entity: Institution

Page Used:

Page	Page Element
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as NULL ERROR.

Aggregate Offshore Return: Provision Entity

The Create Extract process creates Provision entities for Offshore plans and Offshore subplans. That is, the process selects only those subplans for which the Offshore Sub-Plan check box is selected on the Sub-Plan HESA page. If you have selected the Enable Sub-Plan Reporting check box on the HESA Returns page, the process selects only those subplans for which you have selected the Report to HESA and Offshore Sub-Plan check boxes on the Sub-Plan HESA Data page. Also, the process selects only those plans for which the Offshore Plan check box is selected on the Plan HESA Data page. If you have not selected the Enable Sub-Plan Reporting check box, the process selects only those plans for which you have selected the Report to HESA and Offshore Plan check boxes on the Plan HESA Data page.

Country of Activity (COUNTRY)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	Page Element
Plan HESA Data	COUNTRY
Sub-Plan HESA	COUNTRY

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Use default.
5. Derive as *NULL ERROR*.

Institutions Own Campus Identifier (INSTCAMP)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	Page Element
Campus (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Campus)	HESA Institutions Own Campus
Taxonomy/Campus (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus)	Campus

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, select the associated program's campus from the Taxonomy/Campus page. Use the HESA Institutions Own Campus value mapped to the selected campus.
3. If Provision entity is based on a plan, select the associated program's campus from the Taxonomy/Campus page. Use the HESA Institutions Own Campus value mapped to the selected campus.
4. Use default.
5. Derive as *NULL*.

Level of Provision (LEVEL)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	Page Element
Plan HESA Data	LEVEL
Sub-Plan HESA	LEVEL

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.

2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Use default.
5. Derive as *NULL ERROR*.

Number of Students (HEADCOUNT)

Return: Aggregate Offshore

Entity: Provision

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Derive this value by performing a similar selection as for the existing Instance return but restricting the selection to the plan and subplan of each Provision entity. The return will contain just the count. However, in the log file list each student included in the count including their EMPLID, and plan or subplan.
2. If students are not found, derive as 0.

In the first step, the process includes students who have a plan or subplan that overlap the reporting period and have been enrolled; that is, the student either has a status of *Enrolled* or has an associated enrolled classes that the student enrolled on or before reporting period end date

Note. If the process does not return a HEADCOUNT value for the plan or subplan, include the student in the extract but do not include the student in the XML file.

Type of Activity (TYPE)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	Page Element
Plan HESA Data	TYPE
Sub-Plan HESA	TYPE

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.

3. Derive from the Plan HESA Data page.
4. Use default.
5. Derive as *NULL ERROR*.

ITT Return: Institution Entity

The Create Extract process creates a single entity record for the institution with the RECID and UKRPN fields.

Record Type Indicator (RECID)

Return: ITT

Entity: Institution

Pages Used:

<i>Page</i>	<i>Page Element</i>
Reporting Period	Record Year
Returns	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where YY is the final two digits of the Record Year (for example, 09 for 2009) and NNN is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR*.

For ITT Return, the Record ID is 053. The Record ID is delivered with CS 9.0 Bundle 13.

UK Provider Reference Number (UKPRN)

Return: ITT

Entity: Institution

Page Used:

<i>Page</i>	<i>Page Element</i>
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as NULL ERROR.

ITT Return: Student Entity

The Create Extract process creates ITT Student entities only if all the following conditions are satisfied:

- Report to HESA check box is selected on the HESA Instance Data page for the HESA Instance data record.
- The student's program commencement date is before or within the reporting period.
- Either: (a) the student has been term activated for a term that begins within the reporting period and the student has at least one enrolled class related to that term or (b) the student has an FTE value of greater than zero for the reporting period. The process determines the FTE value for the reporting period from the HESA Instance Data record as either the Override FTE value or else the Calculated FTE value.
- The most recent effective dated Student Program stack record has a Program Status matching one of the Eligible Program Statuses defined for the return on the HESA Returns page.
- If a subplan is selected as the run parameter, check that the Report to HESA check box is selected and the TTCID value is 1, 2, or 8 for the subplan on the Plan HESA Data page.
- If subplan is not selected, check that the Report to HESA check box is selected and the TTCID value is 1, 2, or 8 for the plan on the Plan HESA Data page.

If all the conditions are satisfied, then the process create a record in the ITT Student Extract table with status set to ACTIVE using the following values:

- EMPLID
- HUSID: The process determines this value from External System ID record for the EMPLID, where the ID type is the same as that defined for HUSID on the HESA Types page. If HUSID does not exist, the process creates a new HUSID.
- NUMHUS (Student Instance Number): The process determines this value from the HESA Instance record as either Linked Career and Linked Career Number (if defined). Otherwise, it uses a combination of Career and Career Number as the NUHMUS value, that is ACAD_CAREER and STDNT_CAR_NBR. For example, UGRD1.
- COURSEID: If a sub-plan is selected as the run parameter, the process uses the Sub-Plan code as the COURSEID, If the subplan is not selected, the process uses the plan code.

If you provided an EMPLID for the Student ID run parameter, the process creates ITT Student entity records for only the selected EMPLID.

The Create Extract process selects External Degree records to derive the degree fields (such as DEGENDDT and DEGEST). If the student has multiple records, the process selects the most recent record.

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the process selects distinct EMPLIDs from the existing active ITT extract data, where at least one field in the Student or Course Subject extract data has a derived value of NULL ERROR. The process then selects Student entity records for these EMPLIDs.

If you have selected the Validation Errors Only check box for the Include Student Entities, the process first deletes any Validation Error staging records where EMPLID is blank. Then, it selects distinct EMPLIDs from the Validation Error staging table. The process selects Student entity records for these EMPLIDs. Finally, it deletes records from the Validation Error staging table where EMPLID is populated.

Date of Birth (BIRTHDTE)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Date of Birth

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Biographical Details page in the format YYYY-MM-DD.
2. Derive as *NULL ERROR*.

Course Identifier (COURSEID)

Return: ITT

Entity: Student

Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. If subplan is being reported to HESA, derive as COURSEID from the Academic Sub-Plan Table record.
2. If plan is being reported to HESA, derive as COURSEID from the Academic Plan Table record.

Course Title (CTITLE)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Plan HESA Data	Course Title
Sub-Plan HESA	HESA Course Title
Academic Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Academic Plan
Academic Sub-Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table)	Academic Subplan

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive as the HESA Course Title value from the Sub-Plan HESA page.
2. If the Course Title field does not have a value, use a combination of the plan and subplan descriptions from the Academic Plan Table and Academic Sub-Plan Table pages (that is, .DESCR from PS_ACAD_PLAN_TBL + space + DESCR from PS_ACAD_SUBPLN_TBL).
3. Derive as the Course Title value from the Plan HESA Data page.
4. If the Course Title field does not have a value, use the plan description from the Academic Plan Table page (that is, DESCR from PS_ACAD_PLAN_TBL).

Start Date of Instance (COMDATE)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	Start Date of Instance

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.

2. Use the following process to calculate the earliest class start date for enrolled classes related to the Instance being reported. This selection is similar to that done for StudentOnModule except that it is not restricted to classes overlapping the reporting period and considers enrollments for linked careers.
 - a. Select all activated terms for the student career of the Instance.
 - b. From each activated term, select classes that satisfy the following conditions:
 - Status = *Enrolled*
 - Units Taken value is greater than zero.
 - Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Extract check box selected on the HESA Configuration page.
 - Repeat Code value is null or does not match a value defined in the Repeat Code Exclusion region with the Extract check box selected on the HESA Configuration page.
 - If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then apply a further filter to the class enrollments. In such a case, select the class only if the program value of the enrollment record is NULL or matches one of the program values in the Student Program records for that career and career number.
 - c. If the Instance has been linked to a prior student career using the Linked Career and Linked Career Number fields in the HESA Instance record, then also consider classes for the previous career.
 - d. Derive the earliest Class Start Date from all the selected classes as COMDATE.
3. Derive as the earliest Effective Date of the HESA Instance Data records.

Course Mode (CRMODE)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	CRMODE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Convert the MODE value to a CRMODE value as follows: if MODE = 01, 02, 12, 13, 14, 23, 24, 25, 63 or 73, derive as 1 (full-time) else derive as 2 (part-time).
3. Derive as *NULL*.

Previous Degree Country (DEGCTRY)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External Organization Location (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details, Location History)	Country
Nationality (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality)	HESA Nationality

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period
- Student.ITTAIM = 110, 113, 020 or 031
- Student.DEGEST does not exist

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Derive from the External Organization Location page.

Select the most recent External Education Organization record with a Degree status of *complete* associated with the current reporting period. Select the most recent effective dated location record, if there are multiple records.

It is possible for the Ext Org to have multiple Location records with the same effective date. In this case, select the record with the lowest Location ID to determine the country.

Use the mapping on the Nationality page to derive as the mapped HESA Nationality code. Otherwise, derive as the COUNTRY_2CHAR value if the mapping does not exist.

2. Use default.
3. Derive as *NULL ERROR*.

The normal 2-character GB code is not valid for DEGCTRY. Therefore, if the value *GB* is derived, the system changes *GB* to the valid code *XK* (United Kingdom, not otherwise specified).

Previous Degree End Date (DEGENDDT)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Courses and Degrees (Student Admissions, Application/Transcript Loads, Education, Courses and Degrees)	Degree Date

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the Courses and Degrees page for the selected record.
2. Use default.
3. Derive as NULL ERROR.

Previous Degree Establishment (DEGEST)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Region (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Region)	HESA Degree Establishment

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as NULL if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Organization record associated with the current reporting period. Derive from the Region page for the selected record. Convert using 2-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL).
2. Use default.

3. Derive as NULL.

Previous Degree Length in Years (DEGLENGTH)

Return: ITT

Entity: Student

Page Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive as Degree Date minus From Date from the External Education record. Convert number of days to years and round off to the nearest year.
2. Use default.
3. Derive as NULL ERROR.

The previous degree length is derived as the nearest number in whole years.

Previous Degree Start Date (DEGSTDT)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External Education (Student Admissions, Application/Transcript Loads, Education, External Education)	From Date

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the External Education page for the selected record.
2. Use default.
3. Derive as NULL ERROR.

Previous Degree Type (DEGTYPE)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Degree Table (Setup SACR, Foundation Tables, Academic Structure, Degree Table)	HESA Degree Type

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the Degree Table page for the selected degree.
2. Use default.
3. Derive as NULL ERROR.

Disability (DISABLE)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	DISABLE
Impairment AUS (Campus Community, Personal Information, Health Information, Impairment AUS)	Type of Impairment

Page	Page Element
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Code

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. If the student has multiple impairment records in the Impairment AUS page, derive as *08* (multiple disabilities). If the student has a single impairment record, use the HESA Disability code from the mapping between the impairment type and the HESA disability code.
3. Use default.
4. Derive as *NULL ERROR*.

You can define a default as either *00* (no known disability) or *99* (not known).

Disabled Student Allowance (DISALL)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	DISALL
Impairment AUS (Campus Community, Personal Information, Health Information, Impairment AUS)	Support Services Request
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Allowance

Field Derivation Rule: If related Student.DISABLE is between 02 and 96, derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If the student has a Support Services Request value defined on the Impairment AUS page, use the mapped HESA Disability Allowance code from the Disability page.
4. Use default.
5. Derive as *NULL ERROR*.

End Date of Instance (ENDDATE)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason Effective Date
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the effective date of the record formatted to YYYY-MM-DD.
2. Derive as *NULL* with ReasonForNull attribute = 9.

Ethnicity (ETHNIC)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	ETHNIC
Ethnicity (Campus Community , Personal Information (Student), Biographical (Student), Personal Attributes, Ethnicity)	Regulatory Region, Ethnic Group
Ethnicity (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Ethnicity)	HESA Ethnic Code

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.

2. Select Person Ethnicity records as follows:

- If a single record exists, use that record.
- If multiple records exist and one is marked as Primary on the Campus Community Ethnicity page, use that record.
- If multiple records exist and none are marked as Primary, select the record with the highest Percentage defined in the Ethnicity Detail page.
- If multiple records are indistinguishable, select the lowest alphabetic Ethnic Group code.
- For the selected record, use the HESA Ethnic code from the mapping between the Ethnic Group, Regulatory Region, and the HESA Ethnic code. If no mapping exists, log an error message and skip to next step.

3. Use default.

4. Derive as *NULL ERROR*.

Forenames (FNAMES)

Return: ITT

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	First Name Middle Name

Note. The First Name page element can accept a maximum of 30 characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the First Name and Middle Name values from the Primary Name record.
2. Derive as *NULL* with ReasonForNull = 9.

Fundability Code (FUNDCODE)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	FUNDCODE
Plan HESA Data	FUNDCODE
Sub-Plan HESA	FUNDCODE
HESA Instance Data	FUNDCODE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Gender (GENDER)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Gender

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Use the Gender value from the Biographical History record.

If the gender value is Male, derive as 1.

If the gender value is Female, derive as 2.

If the gender value is unknown, derive as 9.

HESA Unique Student Identifier (HUSID)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Select External System ID records for the person with the External ID Type defined for HUSID in the HESA Types page.
2. If HUSID is not found, calculate using the following method:
 - First 2 digits: Year of entry into institution (last 2 digits of year, for example, 09 for 2009).
 - Next 4 digits: HESA Institution Identifier + 1000 (for example, QUB = 0184 which becomes 1184).
 - Next 6 digits: 6-digit reference number internally allocated by institution (this is a sequence number, institutions may need to manually increase the sequence number to avoid reusing the same number in the same year of entry).
 - Last digit: Check digit
3. Derive as NULL ERROR.

Positive Indication that self-certification complete (INDSLFCRT)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Entry Profile Data	INDSLFCRT

Field Derivation Rule: If Student.COMDATE is in the current reporting period, derive a value. Otherwise, derive as NULL ERROR.

Derivation Step:

1. Derive from the Entry Profile Data page.
2. Use default.

3. Derive as NULL ERROR.

As return is defined, the system does not derive Null. The system always returns a value, because the inclusion condition is always met and while selecting students for the extract, the system considers only those students for whom COMDATE is between reporting period start and end dates.

Independent Safeguarding Authority Registration Number (ISANUM)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Determine from the External System ID records for the person with the External ID Type defined for ISANUM in the HESA Types page.
2. Derive as *NULL*.

ITT Qualification Aim (ITTAIM)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	ITTAIM
Plan HESA Data	ITTAIM
Sub-Plan HESA	ITTAIM

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. If subplan is being reported, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.

4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as NULL ERROR.

Start Date of ITT Course (ITTCOMDATE)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	ITTCOMDATE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Derive as the same value as Student.COMDATE.

ITT Phase/Scope (ITTPHSC)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	ITTPHSC/Scope
Plan HESA Data	ITTPHSC/Scope
Sub-Plan HESA	ITTPHSC/Scope
HESA Instance Data	ITTPHSC/Scope

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.

3. Derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

ITT Schemes (ITTSCHMS)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	ITTSCHMS
Plan HESA Data	ITTSCHMS
Sub-Plan HESA	ITTSCHMS
HESA Instance Data	ITTSCHMS

Field Derivation Rule: If related Student.TTCID = 1 or 2, derive a value. Otherwise, derive as NULL ERROR.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. Derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Mode of Study (MODE)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program Offering/Year HESA	MODE (Program Year HESA Data group box)
Plan Offering/Year HESA	MODE (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	MODE (Sub-Plan Year Data group box)
Student Program	Program Action Action Reason
Student Program	Acad Load
HESA Instance Data	MODE
Mode of Study (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Mode of Study)	HESA Mode of Study
HESA Action Reasons	Change of Mode Mapping

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Select the Student Program record that has Program Action/Reason values mapped to a HESA Mode in the HESA Action Reasons page. Derive the mapped HESA mode value.

If the derived value is 73 or 74, convert 73 to 63 and 74 to 64.

If the derived value is 02, 12, 13, 14, 23, 24 or 25 (that is, a sandwich placement year), 43, 65, 66, 67, 68, 69, then convert as 01. If the derived value is 31, 32, 33, 34, 35, 36, 37, 38, 39, 44, then convert as 31.

3. Select the academic load from the Student Program record. Derive the mapped HESA code for the selected academic load from the Mode of Study page.

If the derived value is 73 or 74, convert 73 to 63 and 74 to 64.

If the derived value is 02, 12, 13, 14, 23, 24 or 25 (that is, a sandwich placement year), 43, 65, 66, 67, 68, 69, then convert as 01. If the derived value is 31, 32, 33, 34, 35, 36, 37, 38, 39, 44, then convert as 31.

4. Derive as NULL ERROR.

National Insurance Number (NIN)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Determine from the External System ID records for the person with the External ID Type defined for NIN in the HESA Types page.
2. Derive as *NULL*.

Student Instance Identifier (NUMHUS)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	Instance Identifier Linked Career Linked Career Number Academic Career Student Career Nbr

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from HESA Instance Data page as Instance Identifier.
2. Derive from HESA Instance Data page as Linked Career + Linked Career Number.
3. Derive from HESA Instance Data page as Academic Career + Student Career Nbr, for example, UGRD1.

Institution's Own Identifier for Student (OWNSTU)

Return: ITT

Entity: Student

Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Derive as EMPLID.

PGCE Class of Undergraduate Degree (PGCECLSS)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Entry Profile Data	PGCECLSS

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period
- Student.ITTAIM = 110,113, 020 or 031

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile Data page.
3. Use default.
4. Derive as NULL ERROR.

PGCE Subject of Undergraduate Degree (PGCESBJ)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Entry Profile Data	PGCESBJ PGCESBJ2 PGCESBJ3

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period

- Student.ITTAIM = 110,113, 020 or 031

Derive as NULL ERROR if the conditions are not met.

Derivation Steps:

1. Use constant to create a single PGCESBJ field.
2. Derive from the Entry Profile Data page.
3. Use default to create a single PGCESBJ field.
4. Derive a single PGCESBJ field as *NULL ERROR*.

Note. The system can derive up to three values. Each of the values is included as a separate PGCESBJ field in the XML file.

Immediately Prior Surname (PSURNAME)

Return: ITT

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Surname

Field Derivation Rule: If the student has at least one Instance with REDUCEDI = 00, 01, or 04 derive a value. Otherwise, derive as NULL.

Derivation Steps:

1. Derive the previous Last Name from the Primary Name Type History table. This is done by finding the most recent end dated record in which last name is different from the current one.
2. Derive as *NULL*.

Reason for Ending Instance (RSNEND)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: If Student.ENDDATE is completed, derive a value. Otherwise, derive as NULL ERROR.

Derivation Steps:

1. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the mapped HESA code value.
2. Derive as NULL ERROR.

Skills Test Number (SKILLTEST)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Determine from the External System ID records for the person with the External ID Type defined for SKILLTEST in the HESA Types page.
2. Derive as *NULL*.

Family Name on 16th Birthday (SNAME16)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note. The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record. The last name must have a Type of Name value that corresponds with the Name Type set for SNAME16 on the HESA Types page.
2. Derive as *NULL*.

Expected Length of Study (SLENGTH)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	SLENGTH
Program Offering/Year HESA	SLENGTH (Program Offering HESA Data group box)
Plan HESA Data	SLENGTH
Plan Offering/Year HESA	SLENGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	SLENGTH
Sub-Plan Offering/Year HESA	SLENGTH (Sub-Plan Offering HESA Data group box)
HESA Instance Data	SLENGTH

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.

4. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL* with ReasonForNull = 9 .

Family Name (SURNAME)

Return: ITT

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note. The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record.
2. Derive as NULL ERROR.

Title (TITLE)

Return: ITT

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Name Title

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Name Title value from the Primary Name record.
2. Derive as *NULL* with ReasonForNull = 9.

Teacher Reference Number (TREFNO)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for TREFNO in the HESA Types page.
2. Use default.
3. Derive as *NULL*.

Teacher Training Course (TTCID)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	TTCID
Plan HESA Data	TTCID
Sub-Plan HESA	TTCID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Sub-Plan HESA page.

2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Use default.
5. Derive as NULL ERROR.

Unique Learner Number (ULN)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for ULN in the HESA Types page.

Validate the derived value using the checksum method. For information on the checksum method, refer to the Notes section for the ULN field available on the HESA website.

2. Derive as *NULL*.

Units of Length (UNITLGTH)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	UNITLGTH
Program Offering/Year HESA	UNITLGTH (Program Offering HESA Data group box)
Plan HESA Data	UNITLGTH
Plan Offering/Year HESA	UNITLGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	UNITLGTH

Page	Page Element
Sub-Plan Offering/Year HESA	UNITLGTH (Sub-Plan Offering HESA Data group box)
HESA Instance Data	UNITLGTH

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance Data page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL* with ReasonForNull = 9.

Year of Program (YEARPRG)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	Year of Program

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Year of Student on This Instance (YEARSTU)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
HESA Instance Data	Year of Student

Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance Data page.
2. Use default.
3. Derive as NULL ERROR.

ITT Return: Course Subject Entity

The Create Extract process creates a maximum of three Course Subject entity records for each Student entity.

Subject of ITT Course (SBJCA)

Return: ITT

Entity: Course Subject

Pages Used:

Page	Page Element
Program HESA Data	HESA Subject
Plan HESA Data	HESA Subject
Sub-Plan HESA	HESA Subject

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the Sub-Plan HESA page.

3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as NULL ERROR.

For steps 2, 3, or 4, the process:

- Chooses the record that has the ITT Subject check box selected.
- Chooses the record with the greatest percentage, if multiple records have the ITT Subject check box selected.
- Chooses the first record in the alphabetical code order, if multiple records have the ITT Subject check box selected and have the same percentage.

DLHE Return: Institution Entity

The Create Extract Application Engine (SSR_HE_DATA) process creates a single Institution entity. The Institution entity is composed of two fields.

Record Type Indicator (RECID)

Return: DLHE

Entity: Institution

Pages Used:

Page	Page Element
Reporting Periods (Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods)	Record Year
Returns (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns)	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where YY is the final 2-digits of the Record Year (for example, 11 for 2011) and NNN is the 3-digit Record ID for the seeded return.

UK Provider Reference Number (UKPRN)

Return: DLHE

Entity: Institution

Pages Used:

Page	Page Element
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Configuration page.

DLHE Return: Student Entity

The Create Extract process creates a Student entity for each distinct DLHE survey record.

If at least one survey status has been defined on the HESA Returns page, then the process includes a survey only if the survey has a status value that matches one of the defined statuses. If you have not defined a survey status on the HESA Returns page, then the process includes the survey irrespective of status value. Use the Survey Management component to verify the status of a survey (Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Management).

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the process selects distinct EMPLIDs from the existing active DLHE extract data, where at least one field in the Student, Employment, Study, or Teaching extract data has a derived value of *NULL ERROR*. The process then selects the survey records for these EMPLIDs. If a student has more than one survey record, then the process selects all the student's surveys if any of them has any *NULL ERROR* values.

If you have selected the Student Override check box, the process considers the survey records for only the EMPLIDs you have selected.

All Activities – Q1 (ALLACT1)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Enter DLHE Survey (Section A) self-service	Q1 – Activities check box 1

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If the check box is selected, derive as 1.

2. If none of the check boxes has been selected (that is, Student.ALLACT2 to Student.ALLACT8 are all derived as NULL) and Student.STATUS = 07 or 08, derive as X.
3. If none of the check boxes has been selected (that is, Student.ALLACT2 to Student.ALLACT8 are all derived as NULL), derive as *NULL ERROR*.
4. Derive as null.

All Activities – Q1 (ALLACT2-8)

Return: DLHE

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section A) self-service	Q1 – Activities check boxes 2 to 8

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive as follows:
 - ALLACT2 - Derive as 2 if the check box is selected.
 - ALLACT3 - Derive as 3 if the check box is selected.
 - ALLACT4 - Derive as 4 if the check box is selected.
 - ALLACT5 - Derive as 5 if the check box is selected.
 - ALLACT6 - Derive as 6 if the check box is selected.
 - ALLACT7 - Derive as 7 if the check box is selected.
 - ALLACT8 - Derive as 8 if the check box is selected.
2. Derive as null.

April or January Survey (APRJAN)

Return: DLHE

Entity: Student

Page Used:

<i>Page</i>	<i>Page Element</i>
Survey Details	Survey

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record, either 1 or 2.

Higher Education experience for business – Q31 (HEBUSNEXP)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Enter DLHE Survey (Section E) self-service	Q31

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Student.STATUS = 03, 05, 06, 07 or 08, derive as 6 (unable to code).
3. Derive as *NULL ERROR*.

Higher Education experience for study – Q30 (HESTUDYEXP)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Enter DLHE Survey (Section E) self-service	Q30

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Student.STATUS = 03, 05, 06, 07 or 08, derive as 6 (unable to code).
3. Derive as *NULL ERROR*.

Higher Education experience for work – Q29 (HEWORKEXP)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Enter DLHE Survey (Section E) self-service	Q29

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Student.STATUS = 03, 05, 06, 07 or 08, derive as 6 (unable to code).
3. Derive as *NULL ERROR*.

HESA unique student identifier (HUSID)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Survey Details	HUSID

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.

Most important activity – Q1 (MIMPACT)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Enter DLHE Survey (Section A) self-service	Q1 – Most important option

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If a Most important option has been selected, derive the value from 1 to 8 (depending on which Most important option is selected).
2. If Student.STATUS = 07 or 08, derive as X (ineligibility or explicit refusal).
3. Derive as *NULL ERROR*.

Status of data collection (STATUS)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Survey Details	Survey Method

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. Use default value (this is derived from the HESA Fields page not from the Survey Status value on the HESA Returns page).
3. Derive as *NULL ERROR*.

DLHE Return: Employment Entity

A single Employment entity is included in each Student entity.

Employment basis – Q5 (EMPBASIS)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q5

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record (01 to 10).
2. If Student.STATUS = 03, 05 or 06 and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derived as 99 (unknown).
3. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
4. Derive as null.

Country of employment – Q11 (EMPCOUNTRY)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q11 – Employment Country *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Employment.EMPPCODE is null and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

Importance to employer – Q13 (EMPIMP)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q13

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record (1,2,4,5 or 8).
2. If Employment.QUALREQ = 11 or 12 and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

Employer name – Q9 (EMPNAME)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q9

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

UK Postcode for place of employment – Q11 (EMPPCODE)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q11 – Postcode (UK only)

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. Derive as null.

Note. The system derives the Employment.EMPPCODE field prior to the derivation of Employment.EMPCOUNTRY.

Place of employment – Q11(EMPPLACE)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q11 – Town/city/area

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

Unpaid work – Q6 (EMPUNPAID)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q6 – Unpaid Work

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Employment.SALARY is null, derive from survey record (1 if Unpaid Work check box is selected)
2. If Employment.SALARY is null and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*

3. Derive as null.

Total estimated earnings for a year – Q8 (ESTEARN)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q8

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record if the value is greater than zero.
2. If Employment.JOBSNO is in range 2 to 9 and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Note. The system applies a validation on the survey page to ensure that any non-zero value supplied is not less than the value supplied for Salary (Q6).

Job duties – Q4 (JOBDUTIES)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q4

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

How found job – Q15 (JOBFOUND)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q15

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (01 to 09).
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

All reasons for taking the job – Q14 (JOBRSNALL1)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q14 – Reasons check box 1

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive as *01* if the check box has been selected.
2. If none of the check boxes has been selected and either Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

All reasons for taking the job – Q14 (JOBRSNALL2 to 9)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q14 – Reasons check boxes 2 to 9

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive as follows:

- JOBRSNALL2 - Derive as 02 if the check box is selected.
- JOBRSNALL3 - Derive as 03 if the check box is selected.
- JOBRSNALL4 - Derive as 04 if the check box is selected.
- JOBRSNALL5 - Derive as 05 if the check box is selected.
- JOBRSNALL6 - Derive as 06 if the check box is selected.
- JOBRSNALL7 - Derive as 07 if the check box is selected.
- JOBRSNALL8 - Derive as 08 if the check box is selected.
- JOBRSNALL9 - Derive as 09 if the check box is selected.

2. Derive as null.

Main reason for taking the job – Q14 (JOBRSNMAIN)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q14 – Main reason

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (01 to 09).
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Note. There is validation on the self-service page to ensure that the option selected for Main reason has also been selected as one of the Reasons.

Number of jobs – Q2 (JOBSNO)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q2

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record if greater than 1 (2 to 9).
2. Derive as null.

Note. There is validation on the self-service page to ensure the value entered is greater than 1. In step 1, the value is checked to ensure that zero is not derived.

Job title – Q3 (JOBTITLE)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q3

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Nature of employer's business – Q10 (MAKEDO)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q10

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Postdoctoral research contract – derived from Q3 and Q4 (POSTDOC)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Postdoctoral Research Contract *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1, 2 or 3).
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Previously employed – Q16 (PREVEMP)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q16

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1, 2, 3, or 4).
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

Category of previous employment – Q17 (PREVWORK1)

Return: DLHE

Entity: Employment

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section B) self-service	Q17 – check box 1

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive as *01* if the check box has been selected.
2. If none of the check boxes has been selected and Student.ALLACT1 = 1 or Student.ALLACT2 =2, and Employment.PREVEMP is 1, 2 or 3, derive as *NULL ERROR*.
3. Derive as null.

Category of previous employment – Q17 (PREVWORK2 to 7)

Return: DLHE

Entity: Employment

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section B) self-service	Q17 – check boxes 2 to 7

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive as follows:
 - PREVWORK2 - Derive as 02 if the check box is selected.
 - PREVWORK3 - Derive as 03 if the check box is selected.
 - PREVWORK4 - Derive as 04 if the check box is selected.
 - PREVWORK5 - Derive as 05 if the check box is selected.
 - PREVWORK6 - Derive as 06 if the check box is selected.
 - PREVWORK7 - Derive as 07 if the check box is selected.
2. Derive as null.

Part-time hours per week – Q7 (PTHOURS)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q7

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record if value is greater than zero
2. If Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

Qualification required for job – Q12 (QUALREQ)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q12

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (11, 12, 13 or 14).
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*.
3. Derive as null.

Salary – Q6 (SALARY)

Return: DLHE

Entity: Employment

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section B) self-service	Q6 - £

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record if the value is greater than zero.
2. Derive as null.

Note. The system derives the Employment.SALARY field prior to Employment.EMPUNPAID and Employment.ESTEARN. Because a value is required for either Employment.SALARY or Employment.EMPUNPAID when Student.ALLACT = 1 or 2, Employment.EMPUNPAID is derived as *NULL ERROR* if Student.ALLACT is 1 or 2 and Employment.SALARY is null.

Standard Occupational Classification 2010 - derived from Q3 and Q4 (SOCDLHE2010)

Return: DLHE

Entity: Employment

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section B) self-service	Occupational Classification *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT1 = 1 or Student.ALLACT2 = 2, derive as *NULL ERROR*
3. Derive as null.

DLHE Return: Teaching Entity

A single Teaching entity is included in each Student entity.

Employed as teacher – Q18 (EMPLDTEACH)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q18
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. If the check box is selected, derive as *NULL ERROR*
3. Derive as null.

GTC Scotland Teacher Induction scheme – Q19 (GTCSTIS)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
HESA Returns	Country
Enter DLHE Survey (Section C) self-service	Q19

Page	Page Element
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return only if Country in HESA Returns page = Scotland.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. If the check box is selected and Teaching.EMPLDTEACH = 1, derive as *NULL ERROR*
3. Derive as null.

Seeking a teaching post – Q22 (SEEKTEACH)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q22
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. If the check box is selected and Teaching.EMPLDTEACH = 2, derive as *NULL ERROR*
3. Derive as null.

Teaching funded – Q20 (TEACHFUND)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q20

Page	Page Element
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1, 2, 3, or 4).
2. If the check box is selected and Teaching.EMPLDTEACH = 1, derive as *NULL ERROR*
3. Derive as null.

Teaching phase – Q21 (TEACHPHS)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q21
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1, 2, 3, or 4).
2. If the check box is selected and Teaching.EMPLDTEACH = 1, derive as *NULL ERROR*
3. Derive as null.

DLHE Return: Study Entity

A single Study entity is included in each Student entity.

Course name – Q25 (COURSENAME)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q25

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (1, 2, 3, or 4).
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*
3. Derive as null.

Number of courses – Q23 (COURSENO)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q23

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record if the value is greater than zero.
2. Derive as null.

Note. The survey self-service page ensures that any value entered is equal or greater than 2.

JACS 3.0 – derived from Q25 and Q26 (JACS)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	JACS Subject *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*
3. Derive as null.

How funding further study – Q28 (STUDYFUND)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q28

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (01, 02, 03, 04 or 05).
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*.
3. Derive as null.

Subject of study, training or research – Q26 (SUBJECT)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q26

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*.
3. Derive as null.

Type of qualification – Q24 (TYPEQUAL)

Return: DLHE

Entity: Study

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section D) self-service	Q24

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record (01 to 07 or 98).
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*.
3. Derive as null.

Name of university or college – Q27 (UCNAME)

Return: DLHE

Entity: Study

Page Used:

<i>Page</i>	<i>Page Element</i>
Enter DLHE Survey (Section D) self-service	Q27

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Study.UCPROV is 1, 2, 3, 4, 5 or NULL ERROR, derive as *NULL ERROR*
3. Derive as null.

Note. The system derives this field as null if Study.UCPROV is derived as 6 (unknown) or null and the institution name is not provided for Q27.

University or college providing study – Derived from Q27 (UCPROV)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q27 *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from survey record.
2. If Student.ALLACT5 = 5 or Student.ALLACT6 = 6, derive as *NULL ERROR*
3. Derive as null.

Note. The system derives this field prior to Study.UCNAME

Appendix B

Student Records Reports

This appendix provides an overview of Student Records reports and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Student Records Reports: A-Z

This table lists the Student Records reports, sorted alphanumerically by report ID. The reports listed are Crystal and SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Note. On June 1, 2011, Oracle discontinued distribution of SAP's Business Objects Enterprise and Crystal Reports with PeopleTools. Existing customers may use Business Objects Enterprise and Crystal Reports licenses previously received from Oracle. Customers who wish to use future versions of Business Objects and Crystal Reports products with PeopleSoft will need to obtain appropriate license and support directly from SAP/Business Objects.

Report ID and Report Name	Description	Navigation	Run Control Page
SR201 Schedule of Classes	Lists a variety of details for each class that you schedule. (SQR)	Curriculum Management, Schedule of Classes, Print Class Schedule	RUNCTL_SRYSCHD
SR301 Course Catalog	Generates the Course Catalog report based on the selection criteria and report options you specify at runtime. (SQR)	Curriculum Management, Course Catalog, Print Course Catalog	RUNCTL_SRYCATLG

Report ID and Report Name	Description	Navigation	Run Control Page
SR704 Academic Level / Load Rule	Generates a report of the Level Load Rule Table. (Crystal)	Set Up SACR, Foundation Tables, Reports, Level Load Rule Table	PRCSRUNCNTL
SR704A Academic Level	Generates a report of the Academic Level Table. (Crystal)	Set Up SACR, Foundation Tables, Reports, Academic Level Tbl	PRCSRUNCNTL
SR704B Academic Load	Generates a report of the Academic Load Table. (Crystal)	Set Up SACR, Foundation Tables, Reports, Academic Load Tbl	PRCSRUNCNTL
SR705A Grade Basis Exception Mapping Detail	Generates a report for Grade Basis mapping Detail. (Crystal)	Set Up SACR, Products Related, Student Records, Reports, Grade Basis Map Detail	PRCSRUNCNTL
SR706 Degree	Generates a report of the Degree Table. (Crystal)	Set Up SACR, Foundation Tables, Academic Structure, Reports, Degree Table	PRCSRUNCNTL
SR711 Degree Honors	Generates a report of the Degree Honors Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Degree Honors Table	PRCSRUNCNTL
SR712 External Subject	Lists all the external subjects defined in your PeopleSoft system, including effective date and descriptions, as defined on the External Subject Table page. (Crystal)	Set Up SACR, Common Definitions, Reports, External Subject Table	PRCSRUNCNTL
SR713 External Term	Lists all the external terms defined in your PeopleSoft system, including detail about each external term, as defined on the External Term page. (Crystal)	Set Up SACR, Common Definitions, Reports, External Term Table	PRCSRUNCNTL
SR714 Extracurricular Activity	Lists all the extracurricular activities defined in your PeopleSoft system, including detail about each extracurricular activity, as defined on the Extracurricular Activity Table page. (Crystal)	Set Up SACR, Common Definitions, Reports, Extra Activity Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR716 Program Action	Lists all the program actions defined in your PeopleSoft system, including effective date and descriptions, as defined on the Program Action Table page. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Program Action	PRCSRUNCNTL
SR717 Academic Program Action Reason	Lists, by setID, all the program actions reasons defined in your PeopleSoft system, including effective date, descriptions, and associated program actions. This report references fields as defined on the Program Action Reason Table page. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Program Reason Table	PRCSRUNCNTL
SR718 Enrollment Reason	Lists, by setID and academic career, all the enrollment reasons defined in your PeopleSoft system, including detail about each enrollment reason. This report references fields as defined on the Enrollment Action Reason Table page. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Enrollment Reason Table	PRCSRUNCNTL
SR719 Exam Code	Generates a report for the Exam Code Table. (Crystal)	Curriculum Management, Schedule of Classes, Exam Code Table Report	PRCSRUNCNTL
SR720 Requirement Designation	Generates a report for Requirement Designation Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Requirement Designation Table	PRCSRUNCNTL
SR727 Instructor / Advisor	Generates a report for Instructor/Advisor Table. (Crystal)	Curriculum Management, Instructor/Advisor Information, Instructor / Advisor Report	PRCSRUNCNTL
SR727A Instructor Advisor Role	Generates a report for Instructor Advisor Role Table. (Crystal)	Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Role Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR733 Grading Scheme	Generates a report of the grading scheme table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Repeat Scheme Table	PRCSRUNCNTL
SR733A Grading Basis	Generates a report of the grade basis table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Grading Basis Table	PRCSRUNCNTL
CCDATADC Data Dictionary	Lists all the fields in your database with their basic information, including field name, description, filed type, field size and field format.	Set Up SACR, Product Related, Student Records, Reports, Data Dictionary	PRCSRUNCNTL
SR733B Grade Table	Generates a report of the Grade Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Grade Table	PRCSRUNCNTL
SR733C Grade Basis Choice	Generates a report of the Grade Basis Choice Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Grade Basis Choice	PRCSRUNCNTL
SR734 Facility	Generates a report of the Facility Table. (Crystal)	Set Up SACR, Foundation Tables, Facilities, Reports, Facility Table	PRCSRUNCNTL
SR734A Facility Component	Generates a report of the Facility Component Table. (Crystal)	Set Up SACR, Foundation Tables, Facilities, Reports, Facility Component	PRCSRUNCNTL
SR734B Facility Characteristics	Generates a report of the Facility Characteristic Table. (Crystal)	Set Up SACR, Foundation Tables, Facilities, Reports, Facility Characteristic Table	PRCSRUNCNTL
SR735 Room Characteristic	Generates a report of the Room Characteristic Table. (Crystal)	Set Up SACR, Foundation Tables, Facilities, Reports, Room Characteristic Tbl.	PRCSRUNCNTL
SR739 Term Type	Lists, by setID, all the term types defined in your PeopleSoft system, including effective date and description. (Crystal)	Set Up SACR, Foundation Tables, Term Setup, Reports, Term Type Table	PRCSRUNCNTL
SR739A Unit Conversion	Generates a report of the Unit Conversion Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Unit Conversion Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR740 Repeat Scheme	Generates a report of the Repeat Scheme Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Repeat Scheme Table	PRCSRUNCNTL
SR740A Repeat Code	Generates a report of the Repeat Code Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Repeat Code Table	PRCSRUNCNTL
SR741 Class Notes Table	Generates a report of the Class Notes Table. (Crystal)	Curriculum Management, Schedule of Classes, Class Notes Table Report	PRCSRUNCNTL
SR742 Course Attribute	Generates a report of the Course Attribute Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Course Attribute Table Report	PRCSRUNCNTL
SR742A Course Attribute Value	Generates a report of the Course Attribute Value Table. (Crystal)	Set Up SACR, Product Related, Student Records, Reports, Course Attribute Value Report	PRCSRUNCNTL
SR743 Global Notes	Generates a report of the Global Notes Table. (Crystal)	Curriculum Management, Schedule of Classes, Global Notes Table Report	PRCSRUNCNTL
SR744 Class Notes	Generates a report for Class Notes. (Crystal)	Curriculum Management, Schedule of Classes, Class Notes Report	PRCSRUNCNTL
SR775 Study List Report	Generates student study lists by term, academic career, and academic program or group. (Crystal)	Curriculum Management, Enrollment Summaries, Student Study List Report	RUNCTL_SRSTDYLIST
SR776 Grade	Lists all data related to a student's career and term grades, including units taken, units earned, grading basis, official grade, and enrollment totals. (Crystal)	Curriculum Management, Grading, Student Grade Report	RUNCTL_SRGRDRPT
SR776P Grade	Generates the Grade Report from Process button. Lists all data related to a student's career and term grades, including units taken, units earned, grading basis, official grade, and enrollment totals. (Crystal)	Records and Enrollment, Student Term Information, Student Grades	STDNT_GRADE_INQ

Report ID and Report Name	Description	Navigation	Run Control Page
SR777 Transcript	A singular advisement report, or a singular transcript report. The transcript type you specify at runtime determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (Crystal)	Records and Enrollment, Transcripts, Transcript Request, Report Results	SA_REPORT_RESULTS
SRVETRPJ Veterans Report Job	Lists all students within a specified academic institution and academic statistics period that are receiving Veterans benefits. (Crystal)	Records and Enrollment, Enrollment Reporting, Veterans Report	RUNCTL_SRVETRPT
SR800CA Class Attendance	Generates the Class Attendance Report. This is a useful tool for hard-copy attendance tracking. (Crystal)	Curriculum Management, Class Attendance, Attendance Roster by Class	CLASS_ATTENDANCE
SR802 Enrollment Verification	Generates an enrollment verification report for individual students. (Crystal)	Records and Enrollment, Enrollment Verifications, Enrollment Verification	ENRL_VER_REQUEST
SR803 Printing Enrollment Ver. - Bat	Generates the enrollment verification reports in batch. Each report prints in alphabetical order by the student's name (last name, first name) and displays data according to the criteria selected on the Enrollment Verification Req component. (Crystal)	Records and Enrollment, Enrollment Verifications, Enrollment Verification Print	RUNCTL_ENRL_VER

Report ID and Report Name	Description	Navigation	Run Control Page
SR804 Print Errors for Enrl Ver Bat	Lists errors that the enrollment verification process encounters due to student's having negative service indicators. (Crystal)	Curriculum Management, Enrollment Verification, Enrollment Verification Print	RUNCTL_ENRL_VER
SR805 Graduation Report	Lists all current degree checkout status data for all students in your selected population, including ID, career, program, plan, subplan, degree, status, expected graduation term and completion term data. (SQR process, Crystal report)	Records and Enrollment, Graduation, Graduation Report	RUNCTL_GRAD_RPT
SRCLSRST Class Roster	Generates a report of students enrolled in a particular class, including name, grading basis, units taken, primary academic program, and enrollment status. If requested, this report also lists class permissions information. (SQR)	Curriculum Management, Class Roster, Class Roster	RUNCTL_SRCLASSRSTR
SRENRADV Enrollment Advisement	Generates an Enrollment Advisement report. (SQR)	Curriculum Management, Enrollment Requirements, Enrollment Advisement Report	RUNCTL_SRENRADV
SREXSCHD Exam Scheduling	Lists each course's scheduled exam time and facility. (SQR)	Curriculum Management, Schedule of Classes, Generate Exam Schedule	RUNCTL_SREXSCHD
SRGBEXPT Grading Basis Exception	Displays active grade basis exception mapping rules and their details. (SQR)	Set Up SACR, Product Related, Student Records, Reports, Grade Basis Exception	RUNCTL_SRGBEXCPT
SRGRDLPS Grade Lapse	Lists parameter information and enrollment request numbers for all lapsed grade processes. (SQR)	Curriculum Management, Grading, Grade Lapse	RUNCTL_SR_GRD_LPS

Report ID and Report Name	Description	Navigation	Run Control Page
SRLMSEX LMS Batch Extract	Lists high level information about a specific extract process. Detail such as setup values, run control parameters, output file formats, and total record counts referenced by a specific extract process are listed on the report. The report does NOT list the extracted data and is not to be confused with the actual extract file(s). To view the extracted data you must view the extract file itself. (SQR)	Curriculum Management, Learning Management Systems, LMS Batch Extract Process	RUNCTL_SRLMSEX3
SRNSLCEX NSLC Extract File Creation	Generates a report for National Student Clearinghouse (NSLC). This report lists run variables, informational messages about the process run, and NSLC report totals. (SQR)	Records and Enrollment, Enrollment Reporting, NSLC Report	RUNCTL_SRNSLC
SRRSTRPT Grade Roster	Generates a report of the grade roster that instructors can use to write their midterm or final grades, or administrators can use to print out hard copies of the final grades for classes. (SQR)	Curriculum Management, Grading, Print Grade Roster	RUNCTL_SRGRDROSTER
SRSRMSN Class Permission	Generates a report that lists the number of class permissions assigned for each class. (SQR)	Records and Enrollment, Term Processing, Class Permissions, Class Permissions	RUNCTL_SRSRMSN
SRSTDNT2 Study List	Generates an individual student's study list by academic career and term. (SQR)	Records and Enrollment, Enrollment Summaries, Enrollment Summary	STDNT_ENRL_INQ

Report ID and Report Name	Description	Navigation	Run Control Page
SRTCSTEV Student Transfer Evaluation	Lists an individual's transfer credit record. The report is designed in an easy-to-read format intended to be distributed to prospects, applicants, students, recruiters, or advisors. They can see what classes transferred and to which equivalent classes. They can also view their internal and external GPAs. (SQR)	Records and Enrollment, Transfer Credit Evaluation, Transfer Evaluation Report	RUNCTL_SR_TRCR_RPT
SRTRMDF Mid-Term Deficiency Summary	Lists students that have deficient mid term grades for the term you specify. (SQR)	Curriculum Management, Grading, Mid-Term Deficiency Report	RUNCTL_SRTRMDEFCON Y
SRTRPRNT Advisement Report or Transcript report	Generates advisement reports for a transcript request, or all transcripts for a transcript request. The transcript type you specify at runtime determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (SQR)	Records and Enrollment, Transcripts, Batch Transcripts, Transcript Print	RUNCTL_SRTRPRINT
SRWORKLD Workload Copy and Recalc	Generates a report of part time and full time instructors that are over or under the allowed workload assignment. (SQR)	Curriculum Management, Roll Curriculum Data Forward, Copy/Update Workload Process	RUNCTL_WORKLD
SRWORKLD Workload Copy and Update	Lists workload data for individuals who fall into one of six reporting categories. (SQR)	Curriculum Management, Roll Curriculum Data Forward, Update Classes w/Ctg! Changes	RUNCTL_WORKLD

Student Records Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed. The reports are listed alphanumerically by report ID.

SRLMSEX - LMS Batch Extract Report

LMS Institution Table Setup Values	Reports the address usage, address usage description, and phone type specified on the Academic Institution 3 page.
Run Control	Reports the user ID, run control ID, institution, term, file type, and extract mode as specified on the LMS Extract - Setup page for this unique extract event.
Selection Criteria	Reports the option selected on the LMS Extract - Criteria page for this unique extract event. If <i>Filter</i> or <i>Class Number</i> is selected, the corresponding detail appears.
Output Files	Reports the extract file format. If the Combine File check box is selected on the LMS Extract - Output page, then a list of the files selected for extract and combining appear. If the Combine File check box is cleared on the LMS Extract - Output page, then the individual files selected for extraction and their individual file names and location appear.
Messages	Reports a warning when the extract process is unable to locate data that is required by a particular LMS type. For example, when extracting data to Blackboard CourseInfo, all students or "members" must have an email address specified on the Electronic Addresses page.
Total Records Count	Reports the number of people, group, and member records written to the extract file.

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