Introduction to 11*i* Oracle Student System

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Preface

Profile

Before You Begin This Course

Before you begin this course, you should have the following qualifications:

- Working experience with the operations of an institution of higher education.

Prerequisites

- 11*i* Navigate Oracle Applications

How This Course Is Organized

This is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

Related Publications

Oracle Publications

Title	Part Number
Oracle Student System Implementation Guide	B13575-01
Oracle Student System for the United States User Guide	B13574-01
Oracle Student System for the United Kingdom User Guide	B13576-01

Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The ***algorithm*** inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: `debug.set ('I', 300);` Directory: `bin` (DOS), `$FMHOME` (UNIX) Filename: Locate the `init.ora` file. Password: User `tiger` as your password. Pathname: Open `c:\my_docs\projects` URL: Go to `http://www.oracle.com` User input: Enter `300` Username: Log on as `scott`
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (*but* Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do *not* save changes to the database. For further information, see *Oracle7 Server SQL Language Reference Manual.* Enter `user_id@us.oracle.com`, where *user_id* is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish. This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the SELECT command to view information stored in the LAST_NAME column of the EMP table.
Arrow	Menu paths	Select File > Save.
Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	`When-Validate-Item`
Lowercase	Column names, table names	`SELECT last_name` `FROM s_emp;`
	Passwords	`DROP USER scott` `IDENTIFIED BY tiger;`
	PL/SQL objects	`OG_ACTIVATE_LAYER` `   (OG_GET_LAYER ('prod_pie_layer'))`
Lowercase italic	Syntax variables	`CREATE ROLE role`
Uppercase	SQL commands and functions	`SELECT userid` `FROM emp;`

Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select **Invoice** then **Entry** then **Invoice Batches Summary**.

2. (M) From the menu, select **Query** then **Find**.

3. (B) Click the **Approve** button.

Notations:

(N) = Navigator

(M) = Menu

(T) = Tab

(B) = Button

(I) = Icon

(H) = Hyperlink

Typographical Conventions in Help System Paths

This course uses a "navigation path" convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

>   (Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.

2. Under the General Ledger entry, expand Journals.

3. Under Journals, select Enter Journals.

4. Review the Enter Journals topic that appears in the document frame of the help system window.

Introduction to 11*i* Oracle Student System

Chapter 1

Introduction to 11*i* Oracle Student System

11*i* Oracle Student System

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Objectives

After completing this module, you will understand the purpose and processes for using Oracle Student System.

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Agenda

- **Introduction to Oracle Student System**
- Overview of Oracle Student System Subsystems
- Integration with Other Products
- Additional Tools

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Oracle Student System Overview

Oracle Student System is a central management solution for institutions of higher education.

It combines the functions and processes of individual departments into a single software application allowing for increased automation and productivity gains.

Oracle Student System
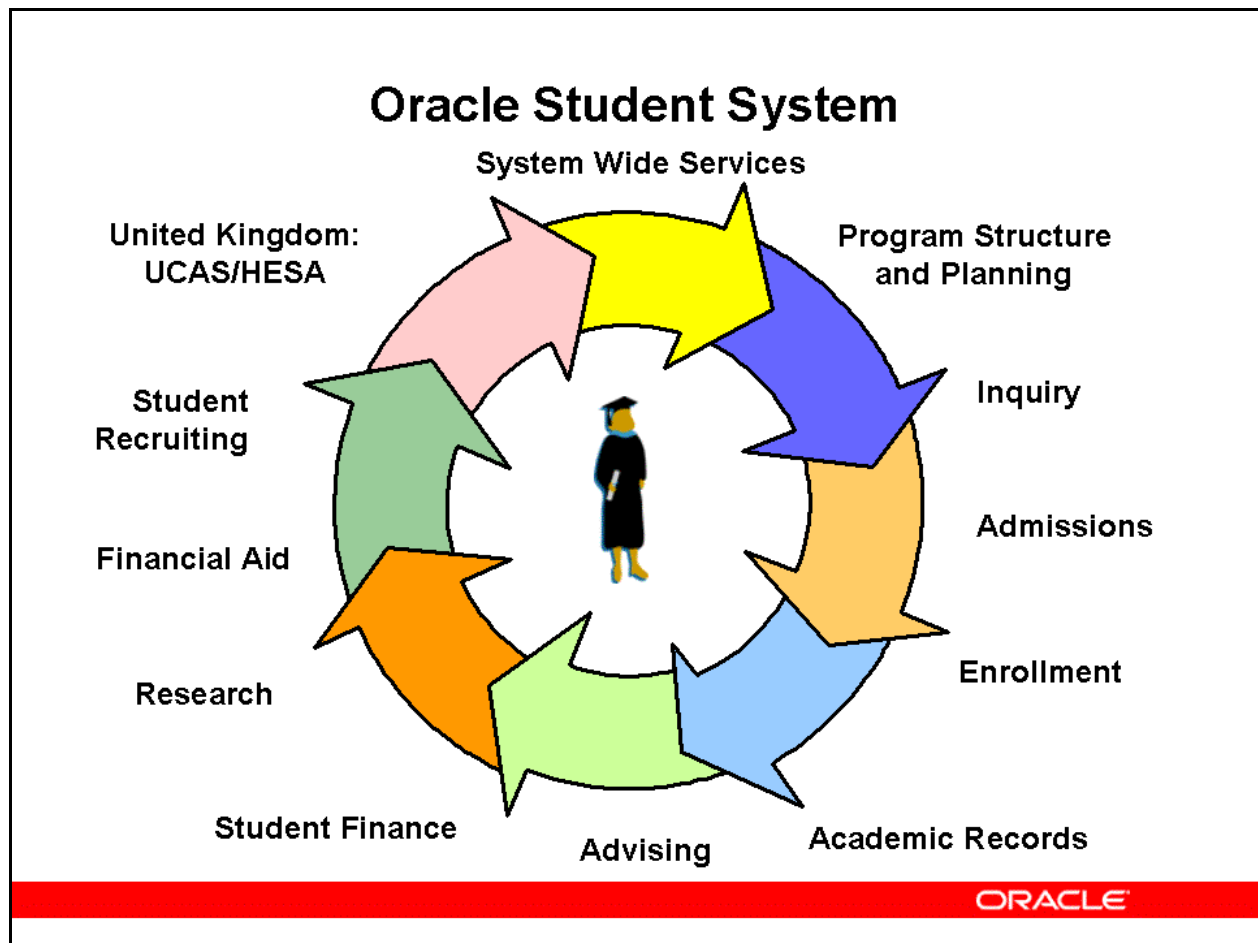
Oracle Student System

Oracle Student System's suite of software subsystems provides your educational institution with an integrated student information management system.

Oracle Student System encompasses institutional processes and functions including admissions and enrollments, fee assessment and financial aid, grading and examinations, graduation, and statistical reporting.

You can maintain student information from an initial informational inquiry through program completion and graduation.

This application provides an enterprise backbone that uses self-service, workflow, and automation to give users easy access to important records, information, and services.

System Wide Services is a series of subsystems which support functionality across all Oracle Student System subsystems. System Wide Services includes:

- Person
- Calendar
- Organizational Structure
- Tracking

- Correspondence

The remaining Oracle Student System subsystems include:

- Program Structure and Planning
- Inquiry
- Admissions
- Enrollment
- Research
- Academic Records
- Advising
- Student Finance
- Financial Aid
- Student Recruiting
- United Kingdom: UCAS/HESA

The Financial Aid subsystem is implemented for sites that participate in the United Stated federal financial aid programs.

The United Kingdom subsystems are completed by sites participating in the UCAS admission process and reporting to HESA.

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

About Oracle Student System

Oracle Student System can be implemented as a standard student information system or it can be used in a far more extensive way to support the current and future needs of your institution.

Implemented at its most basic level, Oracle Student System provides standard student records management and reporting encompassing standard functionality such as:

- Admissions
- Enrollments
- Fees
- Assessments
- Academic
- Examinations and progression
- Graduation
- Reporting

Agenda

Agenda

- Introduction to Oracle Student System
- **Overview of Oracle Student System Subsystems**
- Integration with Other Products
- Additional Tools

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Introduction to 11*i* Oracle Student System

Oracle Student System

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Student Recruiting
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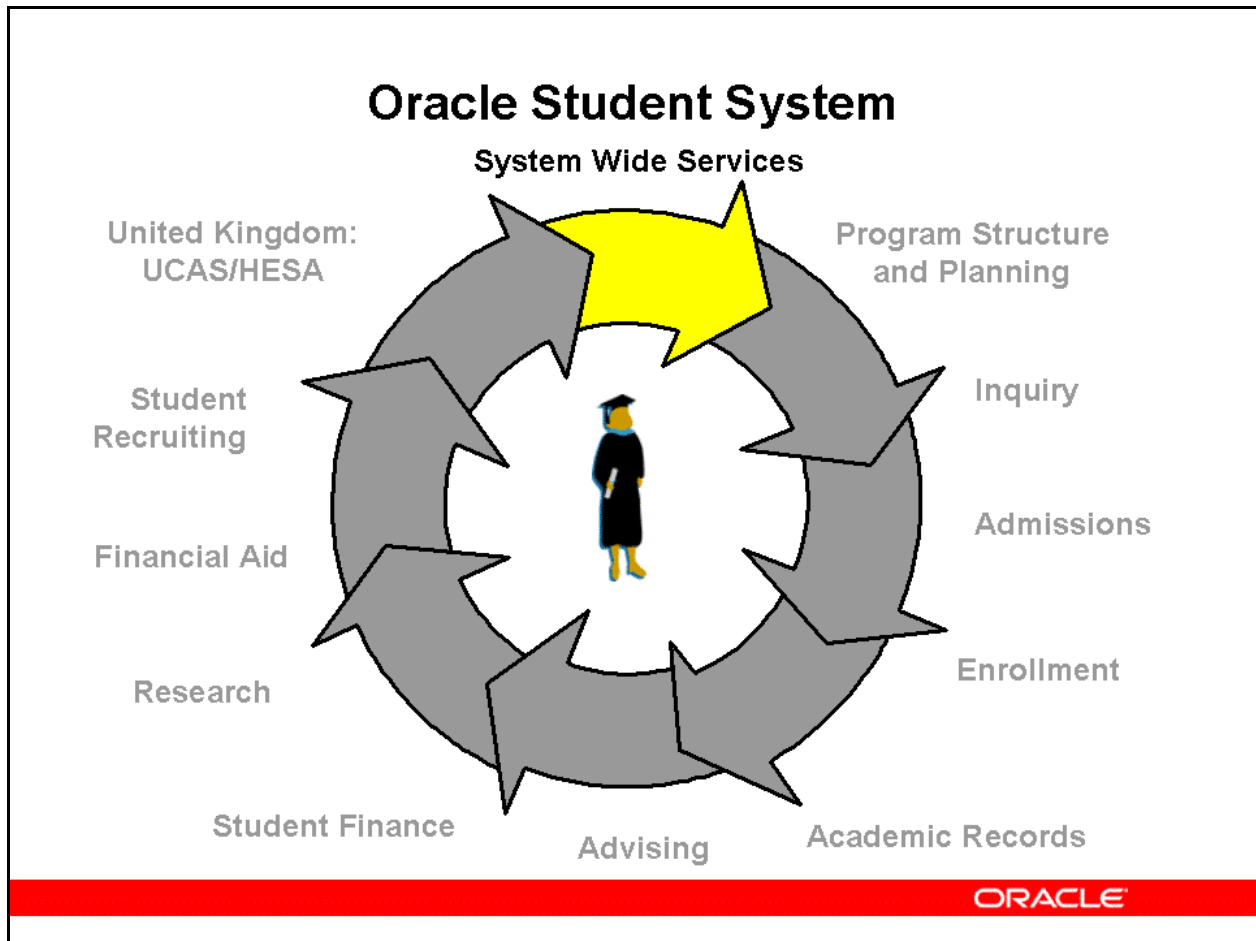
System Wide Services

System Wide Services subsystems provide the structural framework for Oracle Student System.

Several of these subsystems consist entirely of setup.

System Wide Services is composed of:

- **Person**

    Use the Person subsystem to add and maintain records of users including applicants, students, faculty, administrators, and other staff members.

    These person records are used across all Oracle Student System subsystems.

    You can import person details from flat files provided by the government or third-party sources, such as recruitment agents.

    This subsystem is also used to attach holds to students who do not satisfy administrative or academic requirements.

- **Calendar**

Calendars are used to define data and trigger functions in other subsystems. You can define many types of calendars, each representing different time periods in the academic and administrative life of your institution.

- **Organizational Structure**

  You can set up departments, colleges, and schools within your institution. This setup is used throughout Oracle Student System.

- **Tracking**

  You can specify a set of steps or processes to monitor student progress, research students, and admission applications.

- **Correspondence**

  Correspondence includes letters, brochures, and application forms for distribution to students, applicants, and prospects.

  Correspondence items are set up in Oracle One-to-One Fulfillment and concurrent processes are then run to distribute them.

  All interactions with students are recorded and administrators can view information including document name and type, date sent, program code, and award year applied for by the student.
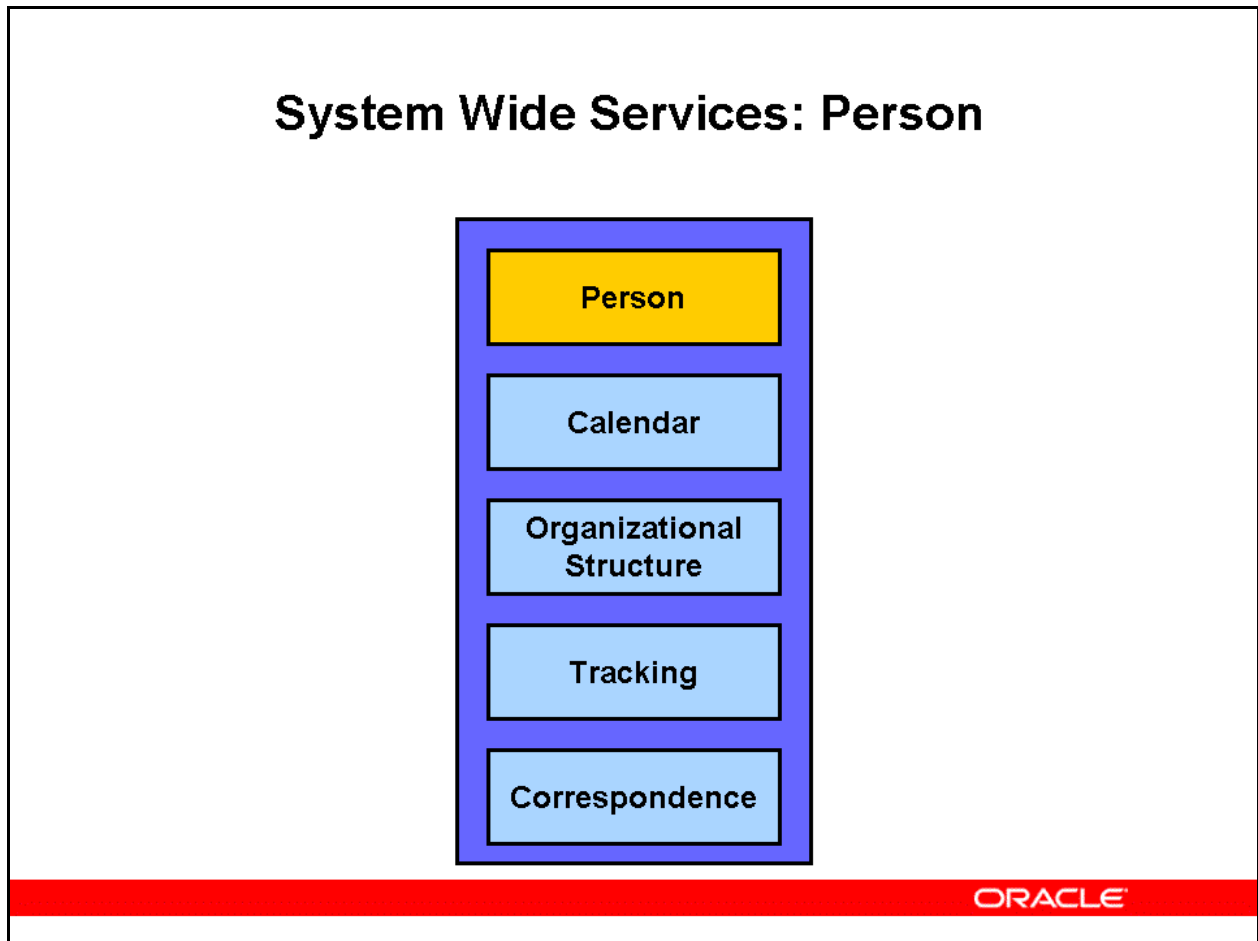
System Wide Services: Person

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

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

The Person subsystem allows you to:

- Set up person types indicating the types of persons entered in Oracle Student System and the data required for each type
- Set up codes and types used as attribute values for various person related entities in Student System
- Define holds and how they are applied
- Create and maintain records for person related entities
- Enter inquiries to retrieve and research data stored in Student System
- Declare comparative profiles, find duplicates, and enable records to be reviewed
- Group data to warn you not to divulge information and for any institution-defined means
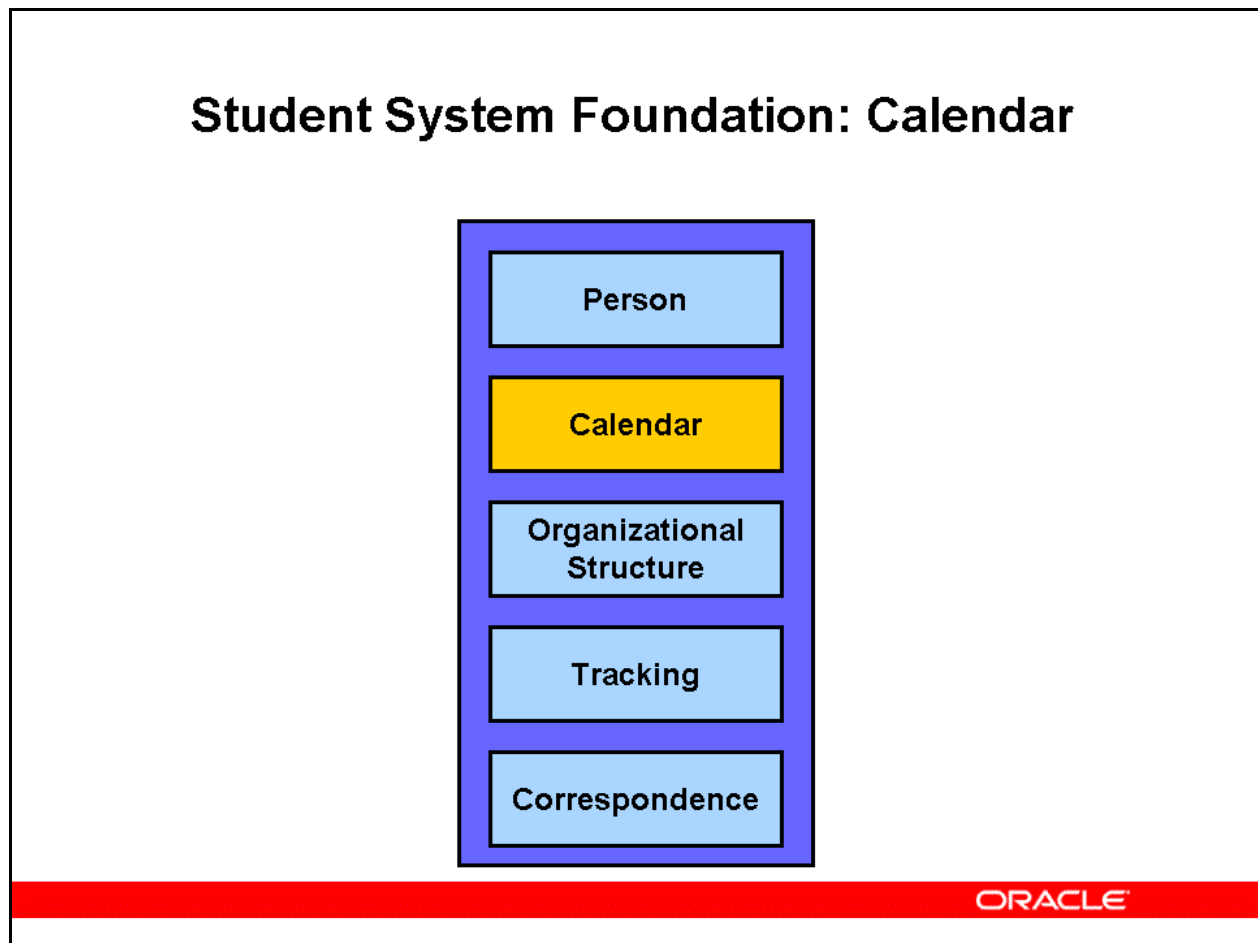
Student System Foundation: Calendar

The Calendar windows record:

- Periods of time, such as enrollment and admission periods
- Significant events and dates linked to periods of time

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

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

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

Terminology

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

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

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

Calendar terminology:

- **Calendar Category**

  System defined, e.g. Teaching Academic, Fee, etc.

- **Calendar Type**

  Institution-defined within a calendar category, e.g., annual, monthly, civil, religious, fiscal, etc.

- **Calendar Instance**

  Start and end dates specified by institution for a particular calendar type, e.g., annual calendar - a calendar for 2005.

- **Date Alias**

  Institution defined, e.g., and event such as the New Year's Day holiday, the start of a term, or an institutional holiday.

- **Date Alias Instance**

  Date specified by institution and assigned to a particular calendar instance, for example, when an event occurs, such as the specific date of the New Year's Day holiday in a particular year.
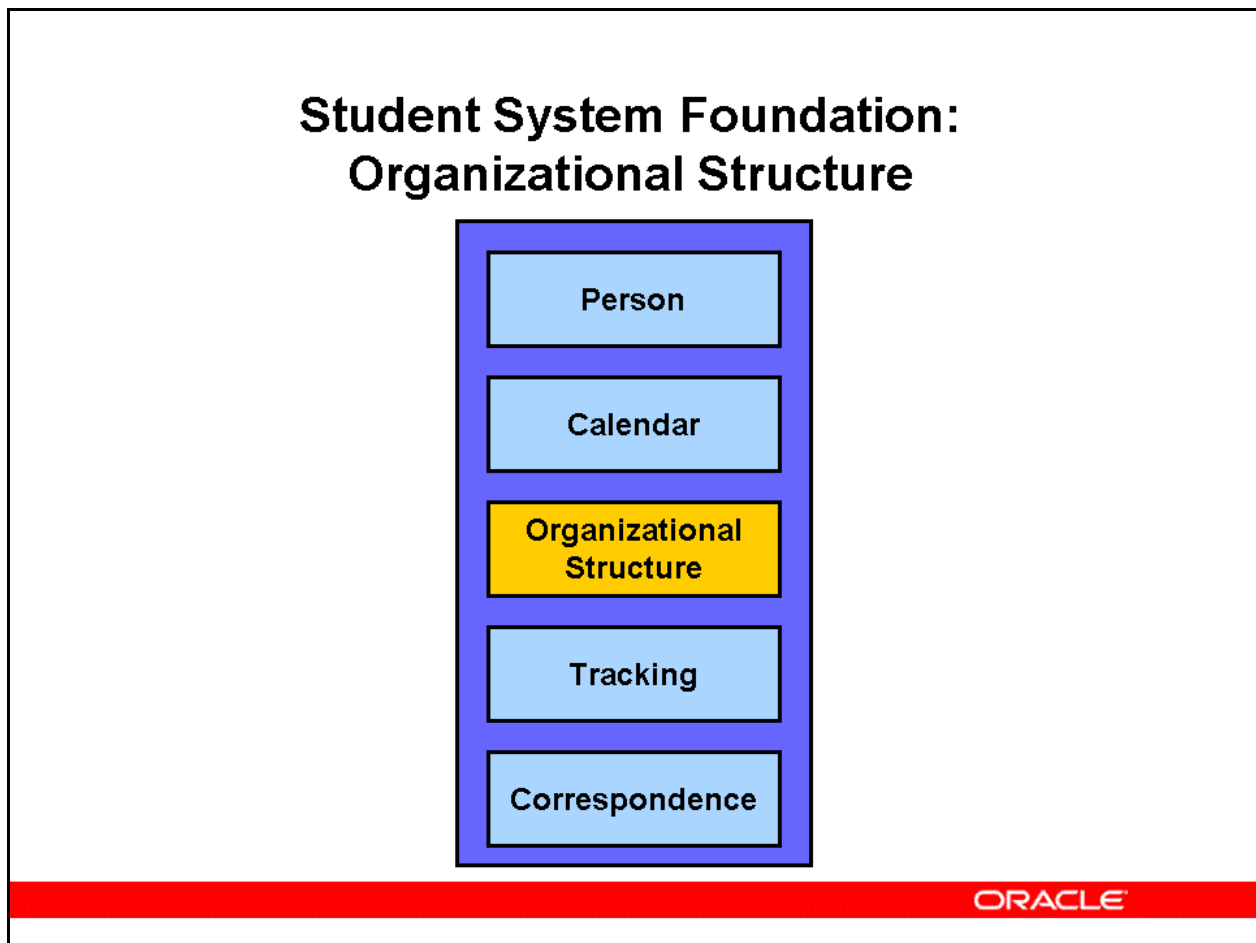
Student System Foundation: Organizational Structure

Organizational Structure maintains all details required to fully define institutions, organizational units, locations and record, and maintains organizational unit details and relationships used by various subsystems.

Other Student System subsystems use and enhance organizational structure details. For example:

- **Advanced Standing**
    - institution details for entering advanced standing applications
- **Program Structure and Planning**
    - organizational unit details for entering program and unit ownership and responsibility
    - organizational unit details for entering program award ownership
    - location details for entering program and unit offering option and pattern details

Most information entered in the Organizational Structure windows is reference data. The ability to add, modify, and delete data in these windows should be restricted to system-wide specialists and system administrators responsible for maintaining institution details and

organizational structures. Most other users use organizational structure details in other subsystems or through special inquiry or reporting interfaces, and should have read-only access.

The Organizational Structure windows maintain all details required to fully define institutions, organizational units, and locations.

Organizational Unit

Organizational unit is dependent on the following data:

- organizational status
- member type
- organizational type
- institution

Organizational unit have the following optional dependencies:

- accreditation details
- notes
- alternate identities
- organizational address
- location

Organizational status is dependent on system organizational status. Organizational unit relationship is an optional dependency for organizational unit.

Institution

Institution is dependent on the following data:

- institution status
- institution type
- institution control type

The following data is optional for institution:

- accreditation details
- notes
- alternate identities
- government institution code
- institution address

Institution address is not dependent on address usage, and location address and organization address are dependent on address usage.

Location

Location is dependent on location type. System location type is an required dependency for location type. Location relationship is an optional dependency for location.
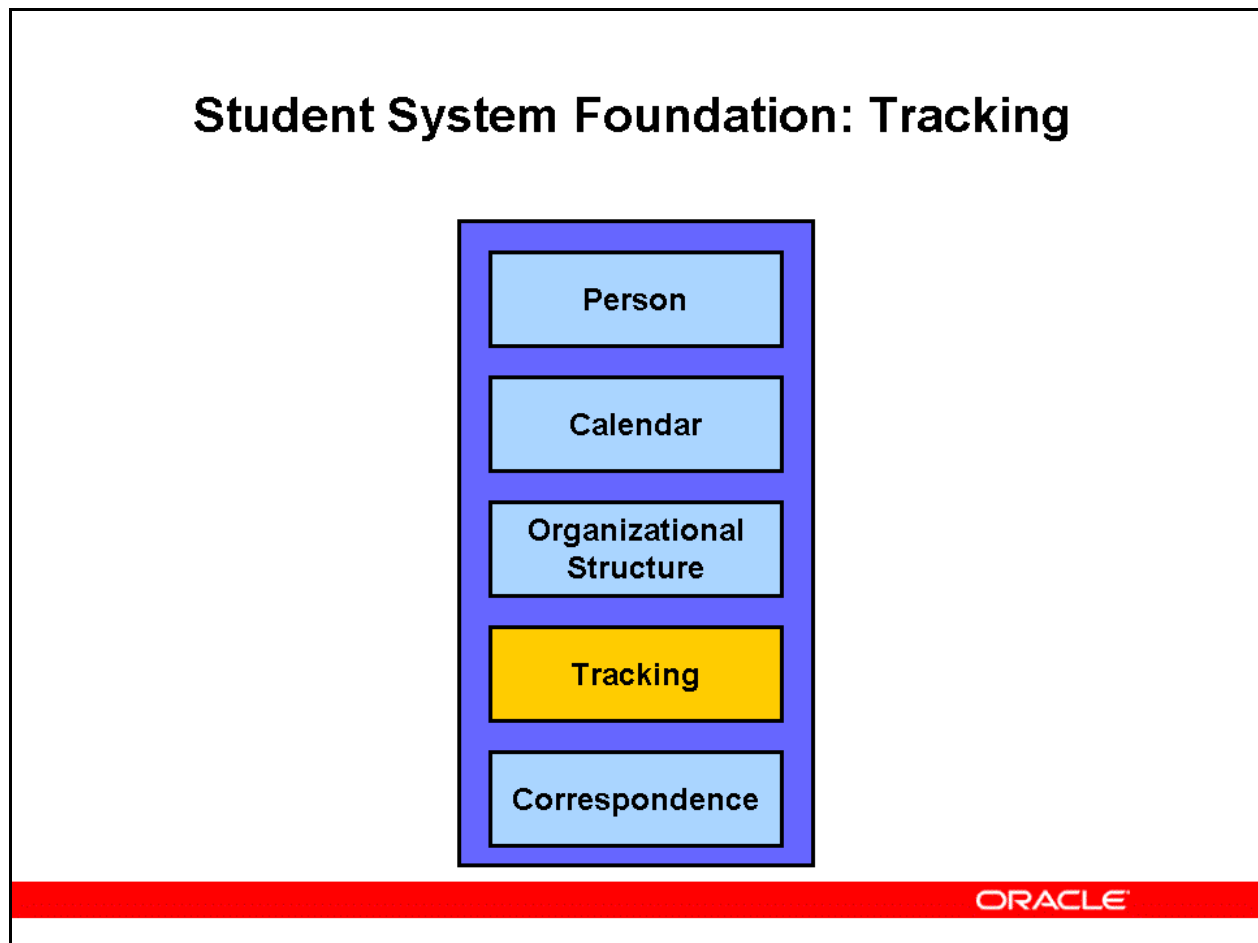
Student System Foundation: Tracking

Tracking enables you to monitor the movement of documents or the progress of defined processes. As documents or processes proceed through sequential steps, they are recorded in Oracle Student System. These steps determine progress of the document or process.

The Tracking windows monitor the movement of documents or the progress of defined processes. As documents or processes proceed through sequential steps, these steps are recorded in the system. Progress is determined by the steps that are completed.

Each item being monitored is called a tracking item.

Tracking items can be manually recorded or started by processes within other subsystems.

Examples of system-initiated tracking items include:

- **Admissions**
    - Applications for admission can be monitored through the approval and offer process.
    - Rejected offers can be monitored if the application for admission will be considered for other program preferences in subsequent rounds.
- **Advanced Standing**

- Manually-assessed advanced standing applications can be tracked through the approval process.
- **Assessments**
  - Applications for extensions to due dates of assessment items can be recorded individually and monitored.
  - Preparation and printing of examination papers and mark sheets can be monitored.
  - Each application for special consideration in the determination of results can be tracked.
  - Applications for review of student unit attempt outcomes, or results, can be individually tracked.
- **Research**
  - Tracking thesis examinations and thesis panel members.

A tracking type is the set of requirements a tracking item must be associated with a person. Once the appropriate definition of requirements sets is established as tracking types, they can be associated with people through a tracking item.

For example, the Admissions subsystem maps predefined tracking types to applicants based on the admissions process category combined with the use of rules to distinguish unique requirements based on applicant characteristics.

As required documents or steps are met for a given process, Tracking reflects the current status of the completed steps. Steps and items can be manually updated.

The following terms are important:

- A tracking item is a document or process monitored by the Tracking windows.
- A tracking type is an institution-defined type that identifies and classifies items being tracked, which maps to system-defined tracking types.
- A system tracking step type classifies tracking steps based on the system seeded type.
- A tracking step catalog is master catalog of steps. Institutions have the option of creating a tracking step catalog.
- A step group is a group of steps linked together. If two or more steps share the same step group number.
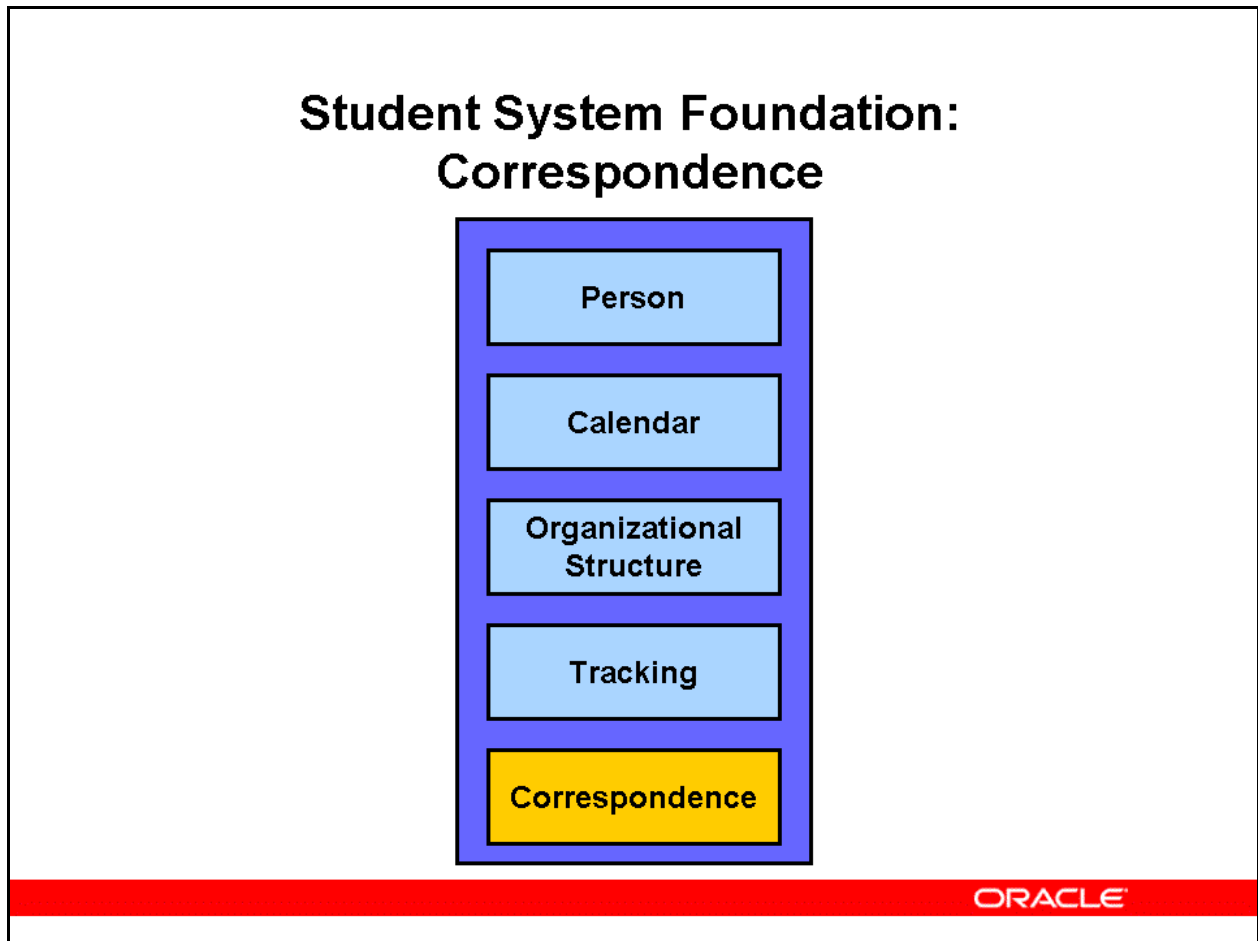
Student System Foundation: Correspondence

Correspondence is an integral part of interactions with students.

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

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

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

Printing

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

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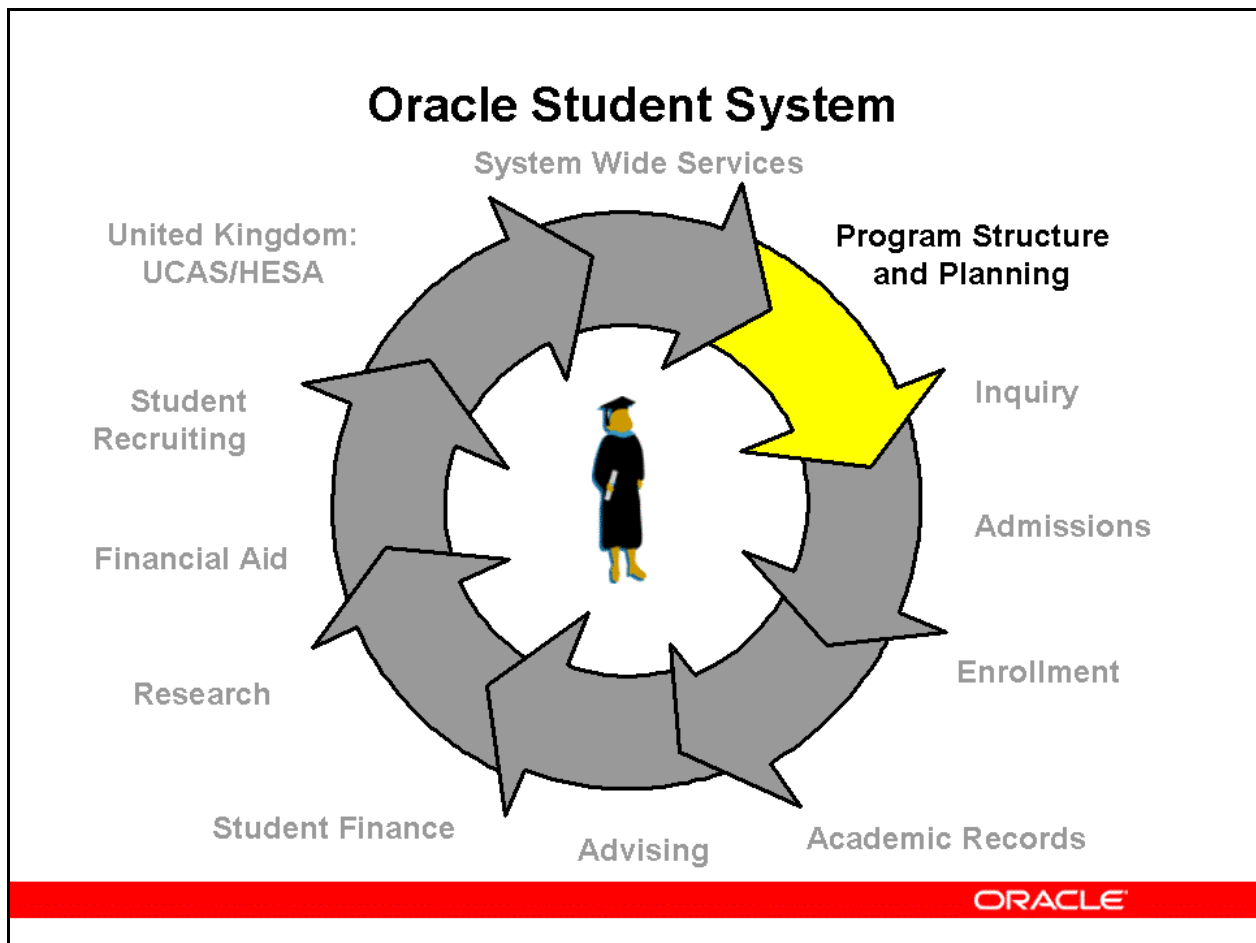
Program Structure and Planning

Use Program Structure and Planning to enter and maintain details related to:

- programs
- units
- program groups
- unit sets, including majors
- unit sections

The programs and units defined in this subsystem are used in:

- Admissions
- Enrollments
- Advanced Standing
- Assessments
- Government Statistics
- Advanced Recruitment
- Student Finance

- Financial Aid

The Program Structure and Planning subsystem is discussed in detail in Oracle Student System Implementation and Administration Guide.

Career

If Oracle Student System is configured for a career centric approach by setting the IGS: Career Model Enabled profile option to Yes, a student is linked to a career or program type, which includes undergraduate, graduate, and professional. Unit attempts are linked to those student careers, which may include one or more program attempts. Unit attempts may be applied to multiple programs or to no programs.

The student career is derived from the program type of the program he or she is attempting.

The units in which the student is enrolled are applied to the student's career.

Academic reporting in institutions in the United States is primarily done by a student's career. Financial Aid evaluates a student's enrollments and progress, and bill tuition and fees using career functionality.

Primary program is an attribute of program attempts. This is used for students who are enrolled in multiple programs within a program type or career within an institution. The primary program enables you to specify on which program to base billing, enrollment validations, and academic statistics.

The following applies to career functionality:
- programs belong to only one career
- students can be in multiple careers, and within each career, students can study toward multiple programs
- admissions admits multiple concurrent programs as two separate application instances
- you must define a primary program attempt within each career
- all new unit attempts are recorded under the primary programs during enrollment
    Note: New unit attempts cannot be enrolled within a program attempt not marked as primary.
- program attempt statuses of non-primary programs are controlled and validated against the status of the primary program within the same career

Administrative users configure Oracle Student System for a career centric approach and set up the relationships among career, program and units.

Oracle Student System

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

Program Structure and Planning

Student Recruiting

Inquiry

Financial Aid

Admissions

Research

Enrollment

Student Finance

Advising

Academic Records

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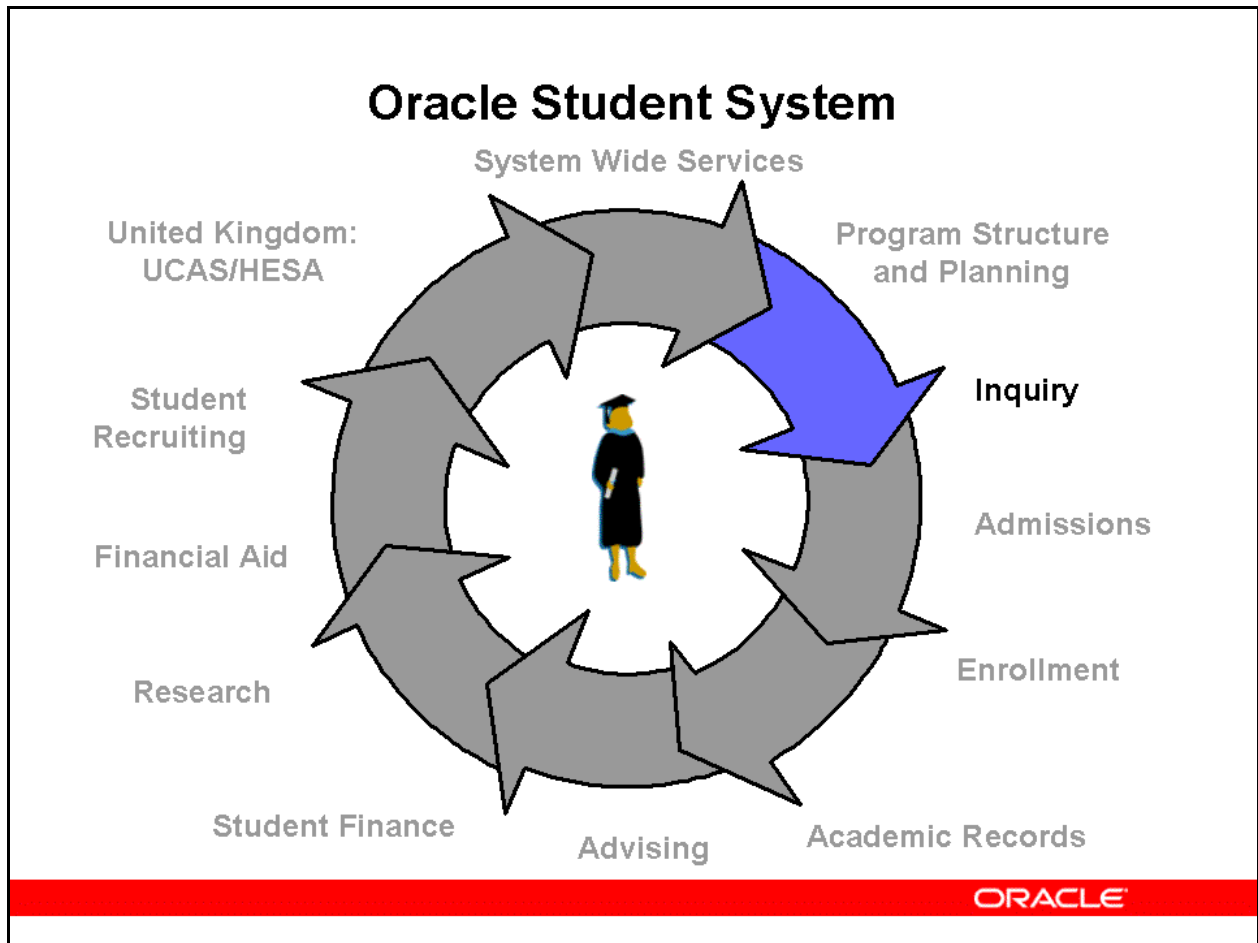
Inquiry

The Inquiry subsystem maintains information related to prospective students.

You can manage all prospect details including requirements, preferences, employment, and test exemptions. Details are then processed to identify a prospect's personal, curricular, and extra-curricular requirements.

The subsystem allows you to create individualized information packages for prospects, addressing their specific needs.

You can also manage probability indices, which are calculated values indicating the likelihood of an individual or prospect applying and eventually enrolling.

Oracle Student System

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System Wide Services

United Kingdom: UCAS/HESA

Program Structure and Planning

Student Recruiting

Inquiry

Financial Aid

Admissions

Research

Enrollment

Student Finance

Advising

Academic Records

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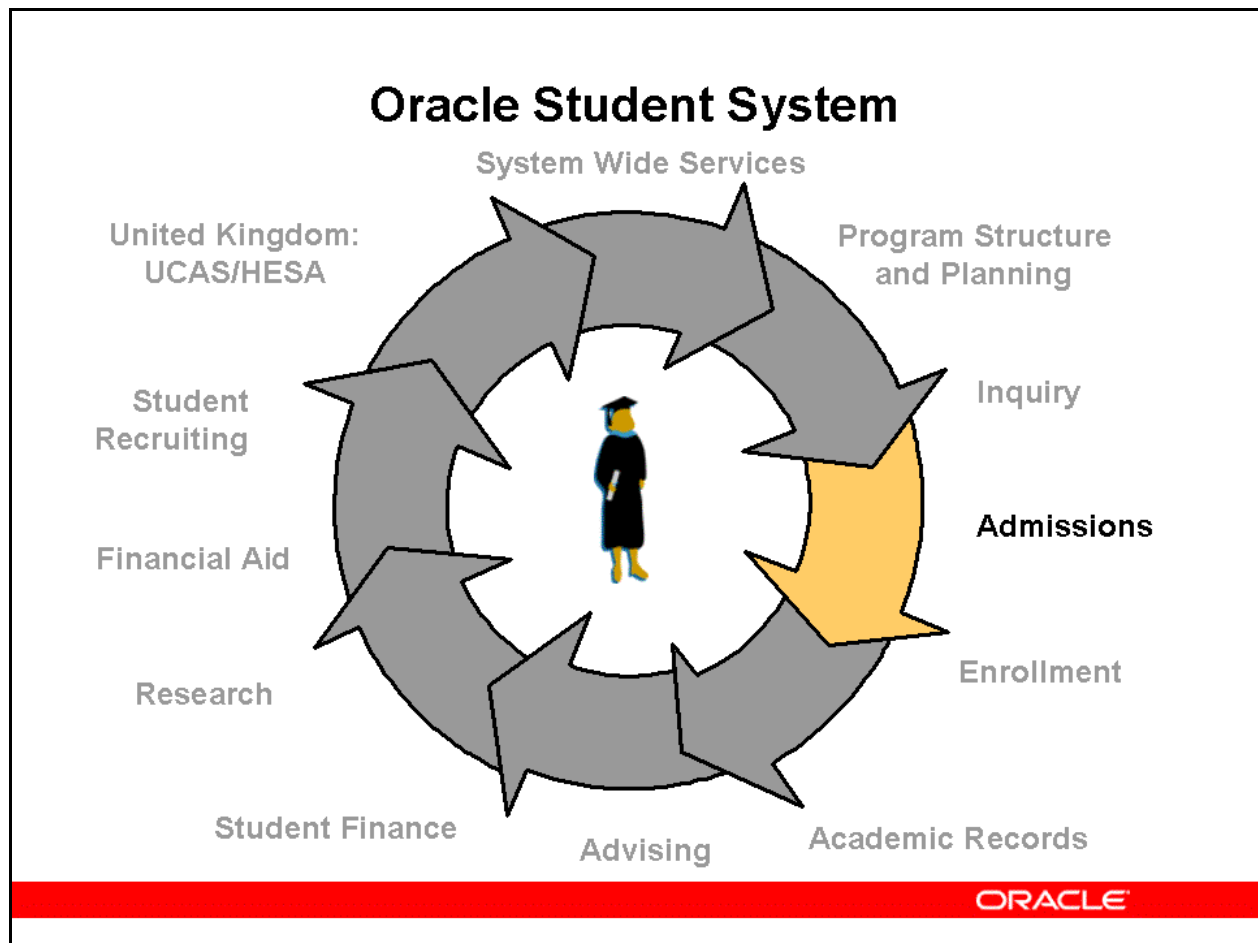
Admissions

The Admissions subsystem enables you to manage all aspects of your admissions processes. You can:

- enter and receive inquiries and applications
- process applications
- make admission decisions
- administer admission fees

Using this subsystem, you can manage admissions-related calendars and define admission procedures. You can also maintain admission inquiries and manage centralized government admissions procedures as well as student intake targets.

This subsystem maintains data related to courses that students have completed and the associated degrees and awards.

Admissions also provides status checking for fee payments and waivers, entry qualifications, documentation requirements, and application outcomes.

You can generate admission statistics if required in accordance by government or oversight agencies.

Oracle Student System

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System Wide Services

United Kingdom: UCAS/HESA

Student Recruiting

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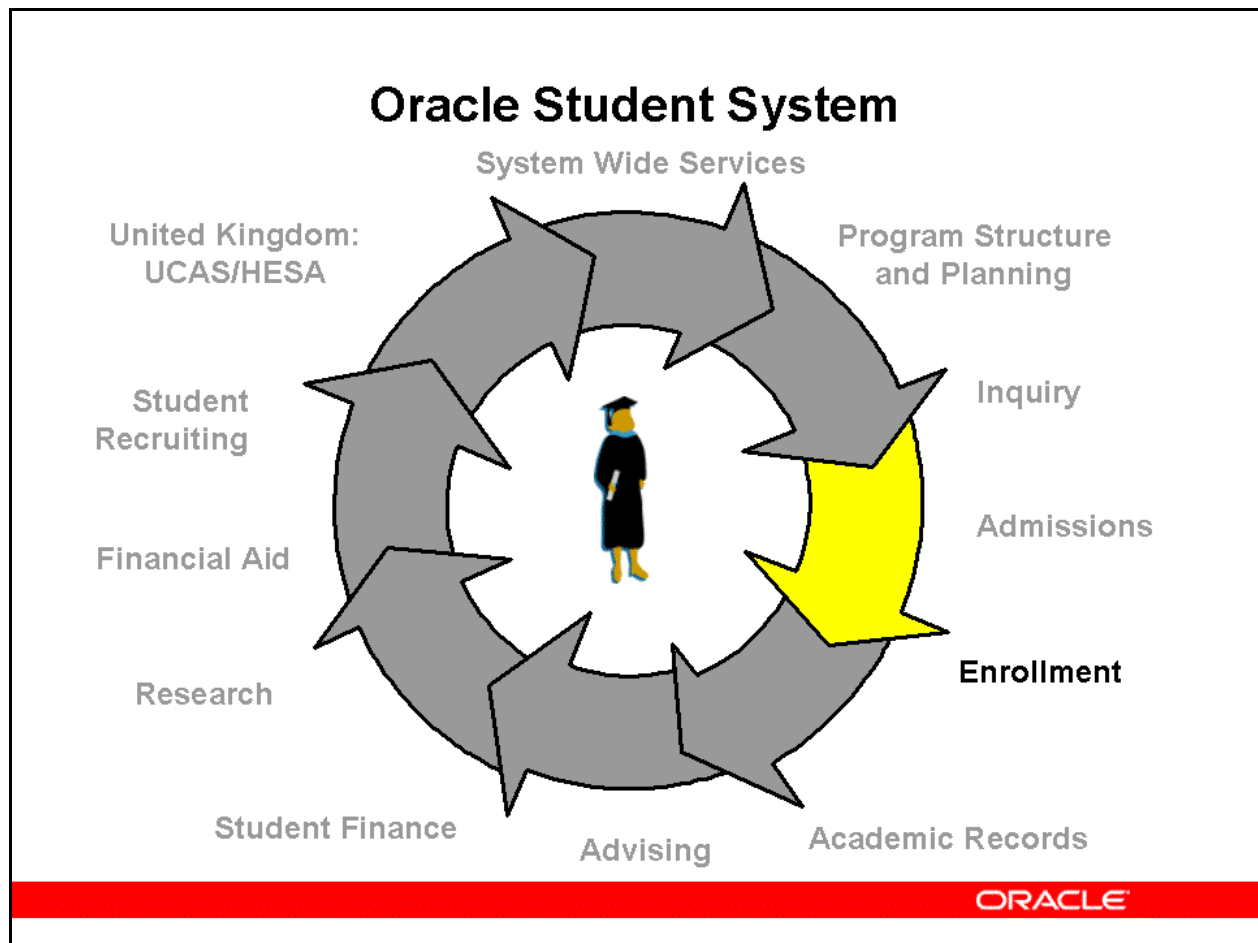
Enrollment

You can manage all enrollment-related activities with the Enrollment subsystem.

The enrollment process begins in Admissions for new and returning students. Enrollment creates student enrollment records that include program, unit set, and unit attempts.

Enrollment processes include verification of student eligibility for both new and returning students and enforcement of academic and administrative holds.

This subsystem also manages changes to enrollment statuses arising out of intermissions or discontinuations.

If required, you can also create waitlists and set up priorities and preferences for enrolling from a waitlist.

Self-service users can search for units, add or drop units, and view schedules, eligibility restrictions, special permissions, enrollment overrides, and timeslot assignments.
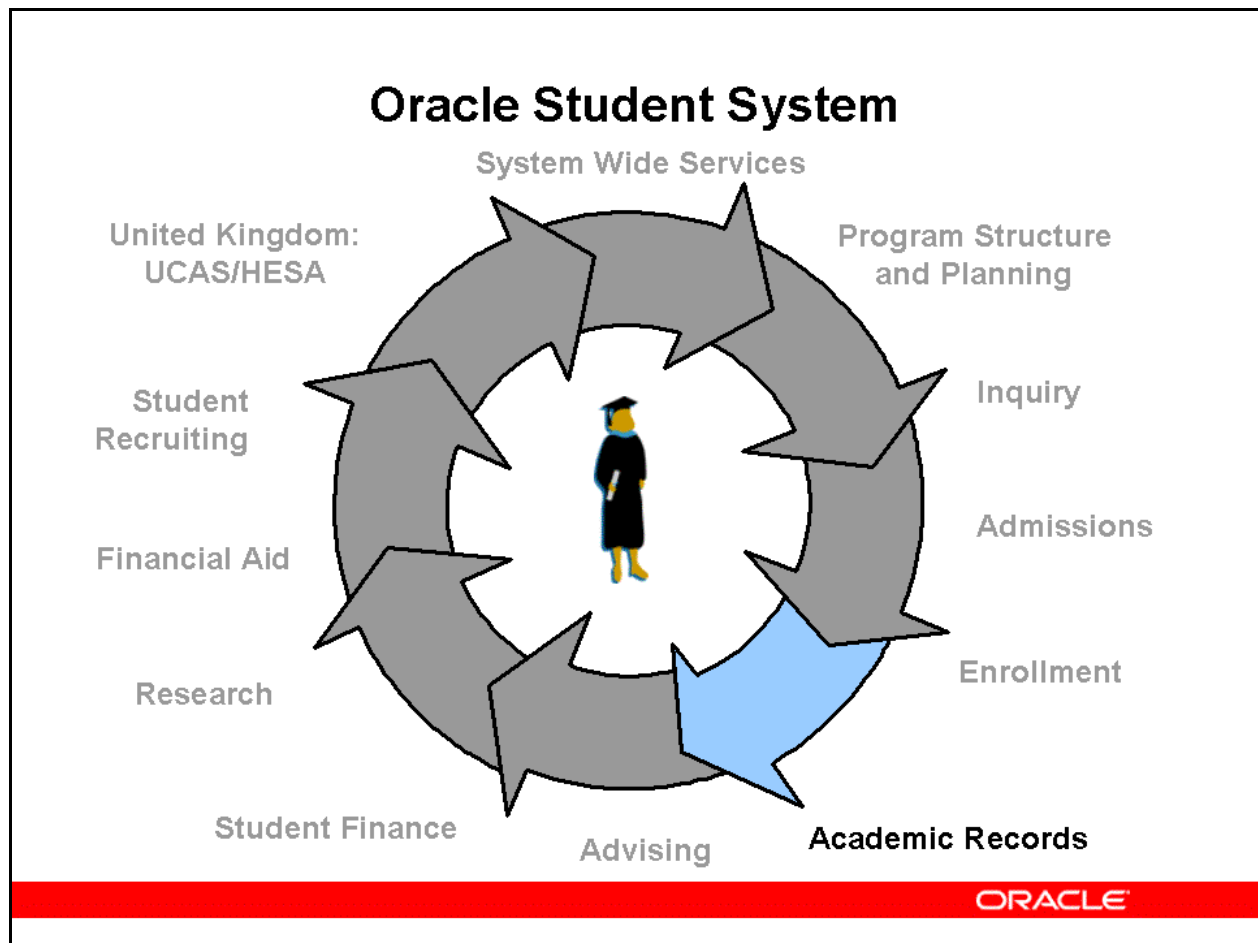
Academic Records

The Academic Record subsystem maintains student academic records in order to determine advanced standing, unit assessments, and progression, and to identify qualified graduates.

Academic Records is composed of:

- **Advanced Standing**

  With advanced standing, a student's prior course work is recognized by Oracle Student System as equivalent to units in the current program.

- **Assessments**

  You can set up and manage academic evaluation of exams, papers, and coursework throughout the term.

- **Academic Statistics**

  This subsystem is also used to track student progress. Student progress is measured using academic statistics that include several academic statistic types, such as attempted and earned credit points, GPA, quality points, and GPA credit points.

- **Progression**

You can define progression rules to track student performance and program completion rules that students must satisfy in order to be eligible for graduation.

- **Program Completion**

  Students must complete all program and award requirements set by the academic body that oversees them. The administrator defines completion rules for each program. Faculty or designated personnel evaluate a student program attempt against these completion rules.

- **Graduation**

  In this subsystem, you can create graduation ceremonies by setting up and managing details such as cap and gown measurement and ceremony location.

- **Degree Audit**

  You can analyze student progress towards meeting degree requirements using degree audit. Oracle Student System integrates with third-party software to provide degree audit and what-if reports.

- **Order Documents**

  On program completion, students can order transcripts and enrollment certificates through self-service.
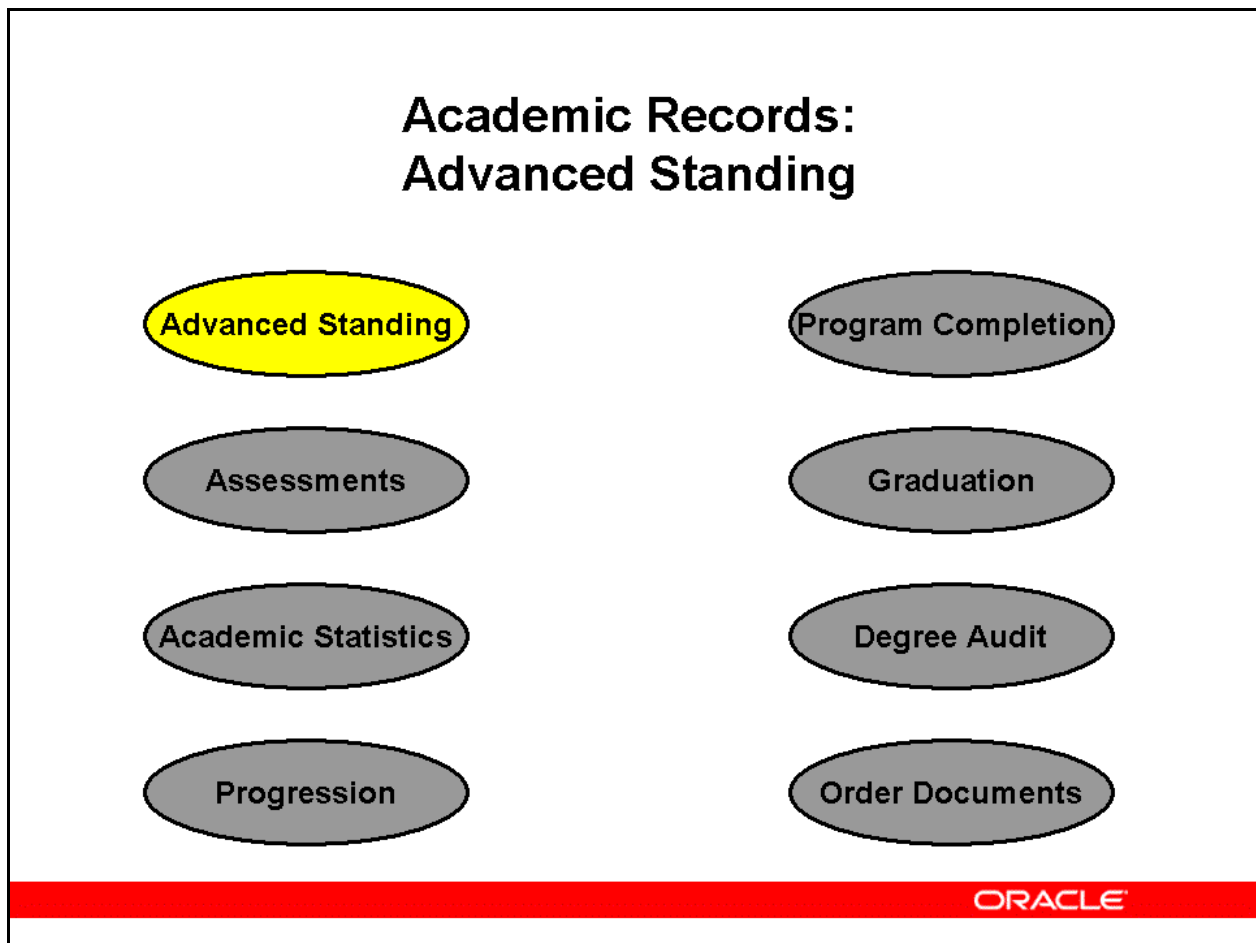
Academic Records: Advanced Standing

Advanced standing or transfer credit refers to the recognition of student prior study or work experience as equivalent to units in the current program. If units studied earlier are judged to be equivalent to units in the program applied for, then the student, is exempt from repeating the unit and receives credit points for it.

For a student to be granted advanced standing, units offered in different universities must be comparable. To this end, faculty review the unit content to identify comparable units for transfer credit. These units are called articulated units. Successful completion of an articulated unit in one campus, enables students to progress to the next level of instruction at another campus.

Advanced standing in Oracle Student System can be recorded:

- Against a specified unit
- At a unit level

Unit Advanced Standing

When a student is granted advanced standing for a unit, one of the following occurs:

- The student receives credit and is exempted from taking the unit.

- The student receives partial credit and is exempted from some study requirements.
- The student is precluded from enrolling in the unit, but can enroll in alternate units. No credit is granted for prior study or experience.

Unit Level Advanced Standing

Unit level advanced standing is granted when it is not possible to identify an equivalent unit for prior studies in the current program.

Advanced standing for a unit level recognizes that prior studies, experience, or expertise is relevant to the current program attempt, and equivalent to credit points at a particular unit level or levels. For example, a student with a diploma in Fine Arts applies for advanced standing in a Bachelor of Arts program. The student is granted eight junior-level credit points of advanced standing.
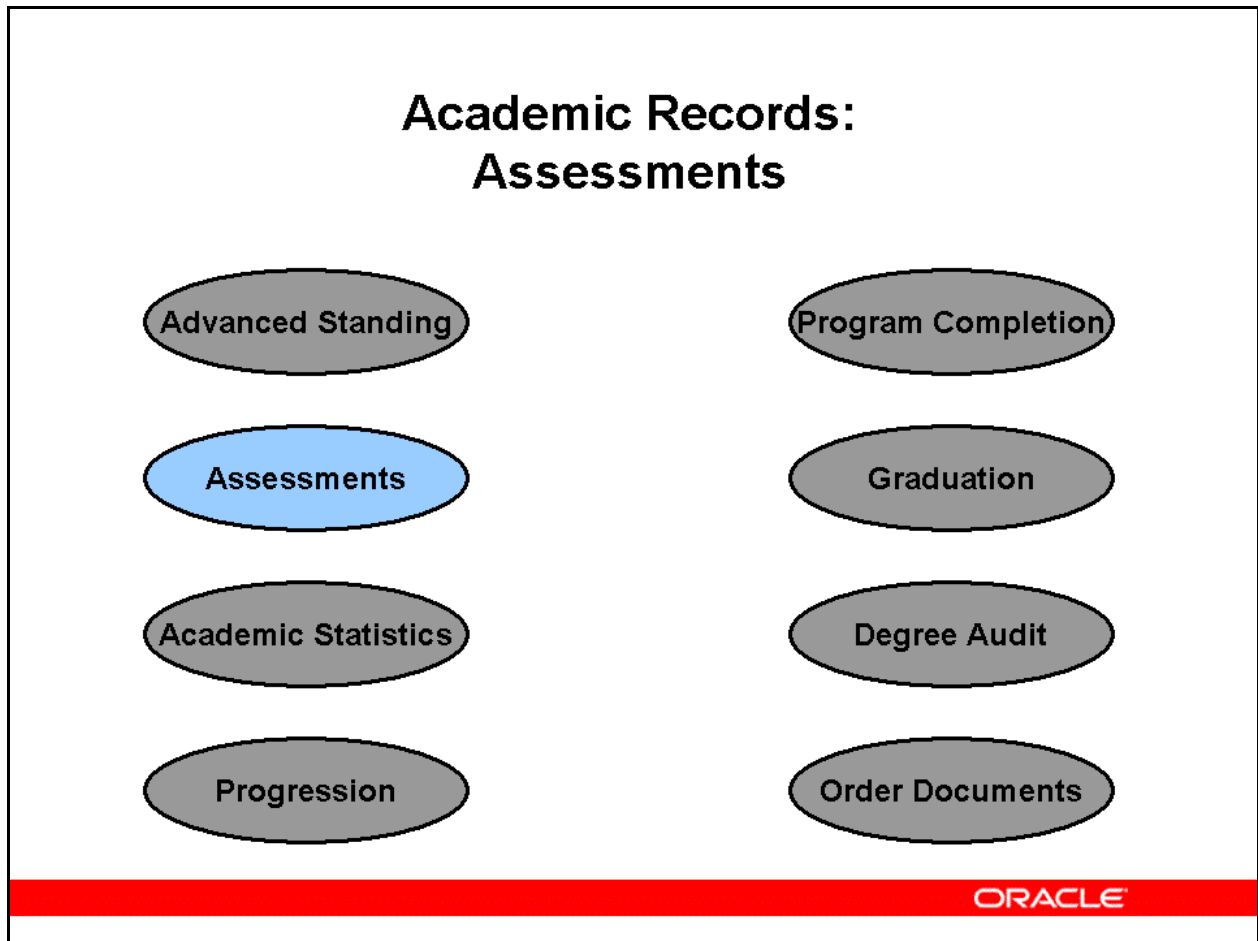
Academic Records: Assessments

Assessment tracks student progress and manages the academic evaluation of students enrolled in units of study.

The assessment process involves:

- Managing assessment items
- Defining grades
- Assigning outcomes to assessment items and unit attempts
- Evaluating applications for special consideration

A unit comprises assessment items, including tests, assignments and papers, used to evaluate and grade student progress. An assessment item can be examinable such as tests and quizzes, or non-examinable such as assignments, essays, and projects.

When a unit attempt or assessment item is evaluated, the faculty or designated personnel enter relevant outcomes. An outcome can be a mark such as 82%, or a grade, such as A, or both. Sets of grades or marks are called grading schema. Grading schema are associated with units, unit sections, and assessment items.

Students who have been ill or have had personal problems that have affected their ability to perform academically, apply for special consideration. A board of examiners or designated authority evaluate the applications for special consideration and assign a final outcome, or defer the examination.

Academic Records: Academic Statistics
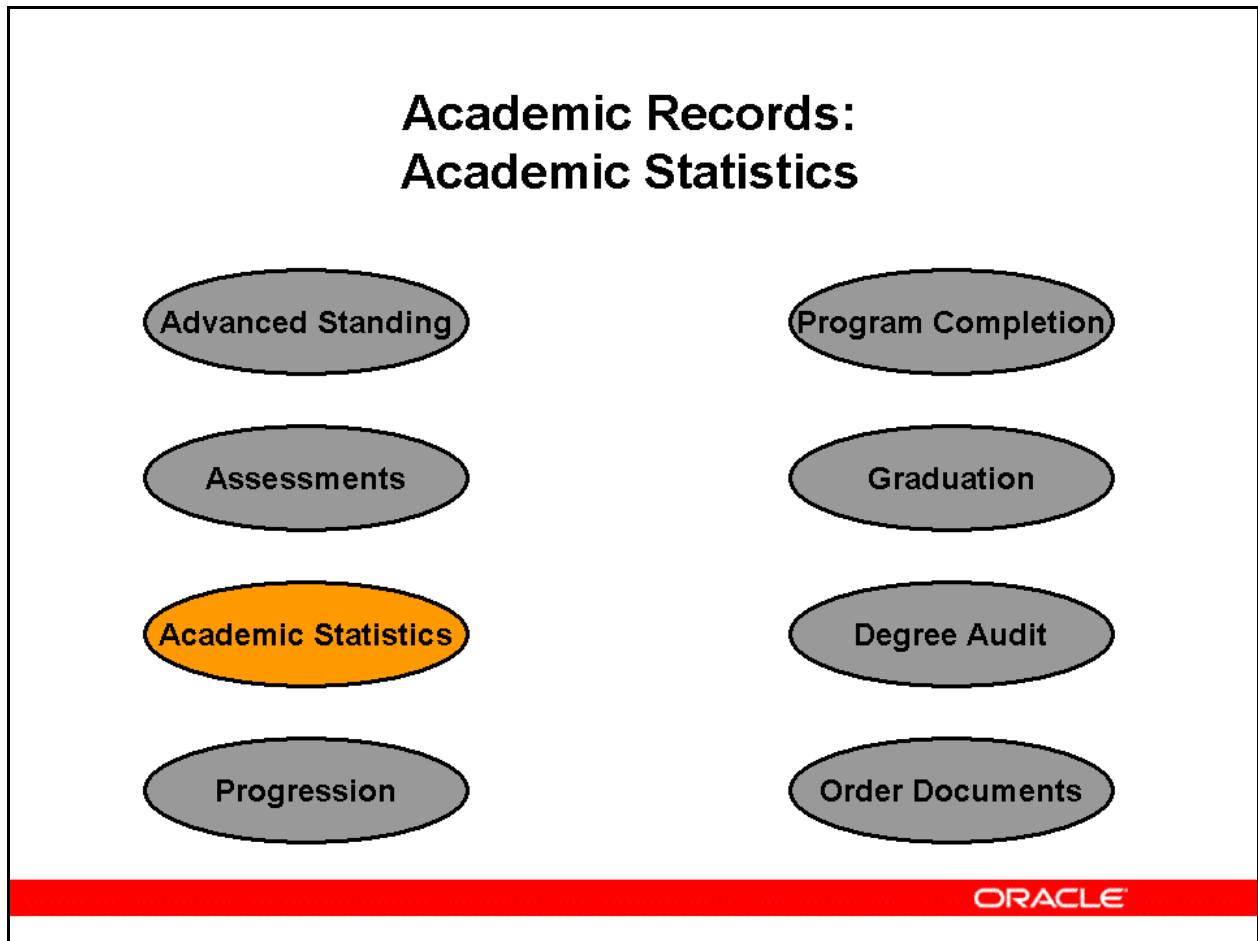
Academic Records: Academic Statistics

Academic statistics measure a student progress and academic success.

Different academic statistic types include:

- **Attempted Credit Points**

  The number of credit points attempted by the student.

- **Earned Credit Points**

  The number of credit points successfully completed by the student towards degree completion.

- **Grade Point Average (GPA)**

  Student average grade across subjects and students. Each subject result is given a grade point value, for example, A=4, B=3, C=2,D=1,F=0, and an average is then derived.

- **Quality Points**

  This is the value associated with a grade per credit hour.

  A credit hour includes time spent in class, in the laboratory or in an activity, and the time spent preparing (reading, analyzing, writing).

Quality points are derived by multiplying the number of quality credits by the mathematical equivalent credit of the grade.

For example, A 3 SH (semester hour) course with a grade of an A (numerical equivalent value of 4) has 12 quality points.

Quality credits are the number of credits for which students are enrolled that count toward their grade point average.

- **GPA Credit Points**

    The total of credits for the student unit attempts (pass or fail outcomes) in which the grading schema for the unit is specified to be included in the GPA. Normally, Letter Grades (A-F) are included while Pass/Fail (P/F) grades are not. This number may or may not be the same as Earned, depending on grading schemas and unit attempts.

Class Standing and Class Rank

Class standing and class rank use academic statistics to calculate their values.

Class standing indicates student position in the enrolled program. Student class standing is based on the total number of completed credits. For example, a student is considered a Sophomore for completing 29-60 semester credits, Junior for 61-92 semester credits, and Senior for 93 semester credits or more. The Earned Credit statistic is calculated to determine the student class standing at that period of time.

Grade point average and class rank reflect the achievement of all students during their enrollment. Class rank is the relative numerical position of a student in a graduating class, calculated on the basis of grade point average. Consider a graduating class of 100 students. The basic concept is to list from highest to lowest the computed grade point averages (GPAs), for example, giving the student with the highest GPA the rank of one, and the student with the second highest GPA the rank of two.

Class ranks are reported in terms of the student's position relative to the number of students being ranked (the ranking cohort). Class rank cohorts are defined to assess student relative performance against the rest of the class. For example: number 10 out of a class of 100 students.

Academic Records: Progression
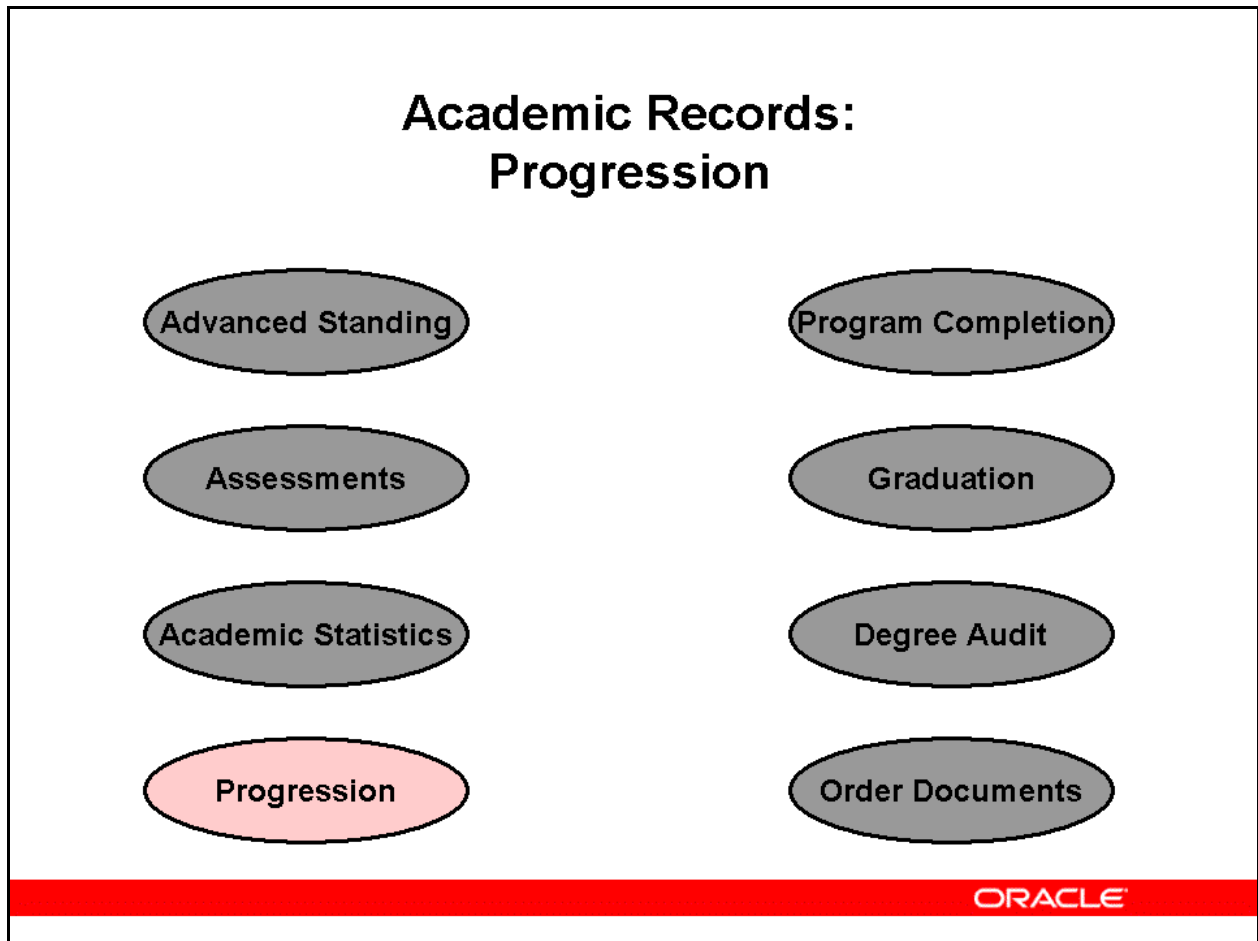
Academic Records: Progression

Assessment of student performance is used to measure student progress towards degree completion. The system administrator defines progression rules that apply measures such as grade point average, weighted average marks, credit points attempted and earned, and class standing to track student performance.

Progression is also measured through degree audit, which can be used periodically to calculate the GPA and identify the number of credits required for program completion.

Progression rules are grouped into the following rule categories:

- **Credit-based**

    Rules based on the number of credit points required. For example, a student must have earned 12 credit points to pass the rule.

- **GPA-based**

    Rules based on the student grade point average. For example, a student must have a GPA of 2.5 to pass the rule.

- **Grade-based**

Rules based on grades received. For example, a student must have received an A grade in Basic Accounting to enroll into Advanced Accounting.

- **Mixed rules**

  A combination of Credit, GPA, and Grade-based rules.

Progression rules have calendars and outcomes associated with them. An outcome is the action taken when a student fails a rule. Each progression rule can have more than one outcome.

Outcomes can be positive such as awards, or negative such as holds. An award is a degree conferred on completing the program. A hold is the penalty applied to a student for failing a progression rule. All academic holds are applied and released through the Progression subsystem only.

The system administrator defines outcomes that are mapped to system-defined progression outcomes. When an outcome is approved by the academic committee, the outcome changes the progression status of the student program attempt. For example, when a student fails a progression rule with an outcome of Suspension and this outcome has been approved by the relevant academic committee, the student progression status becomes Suspension.

System-defined progression outcomes include:

- **Award**

  Confer a degree on the student

- **Exclusion**

  Exclude student from enrolling into a program group, program, unit set or unit

- **Expulsion**

  Expulsion from a program group

- **Ex_fund**

  Exclude from awarding fund/disbursement fund

- **Manual**

  Assign outcome manually to a student program attempt when it is necessary to apply outcomes on students regardless of progression rules

- **No Penalty**

  A warning given with no associated penalty

- **Probation**

  A restriction or requirement placed on student enrollment

- **Repeat**

  Repeat the year

- **Suspension**

  Suspension from a program

Program Completion

Students must complete all program and award requirements set by the academic body that oversees them. The administrator defines completion rules for each program. Faculty or designated personnel evaluate a student program attempt against these completion rules.
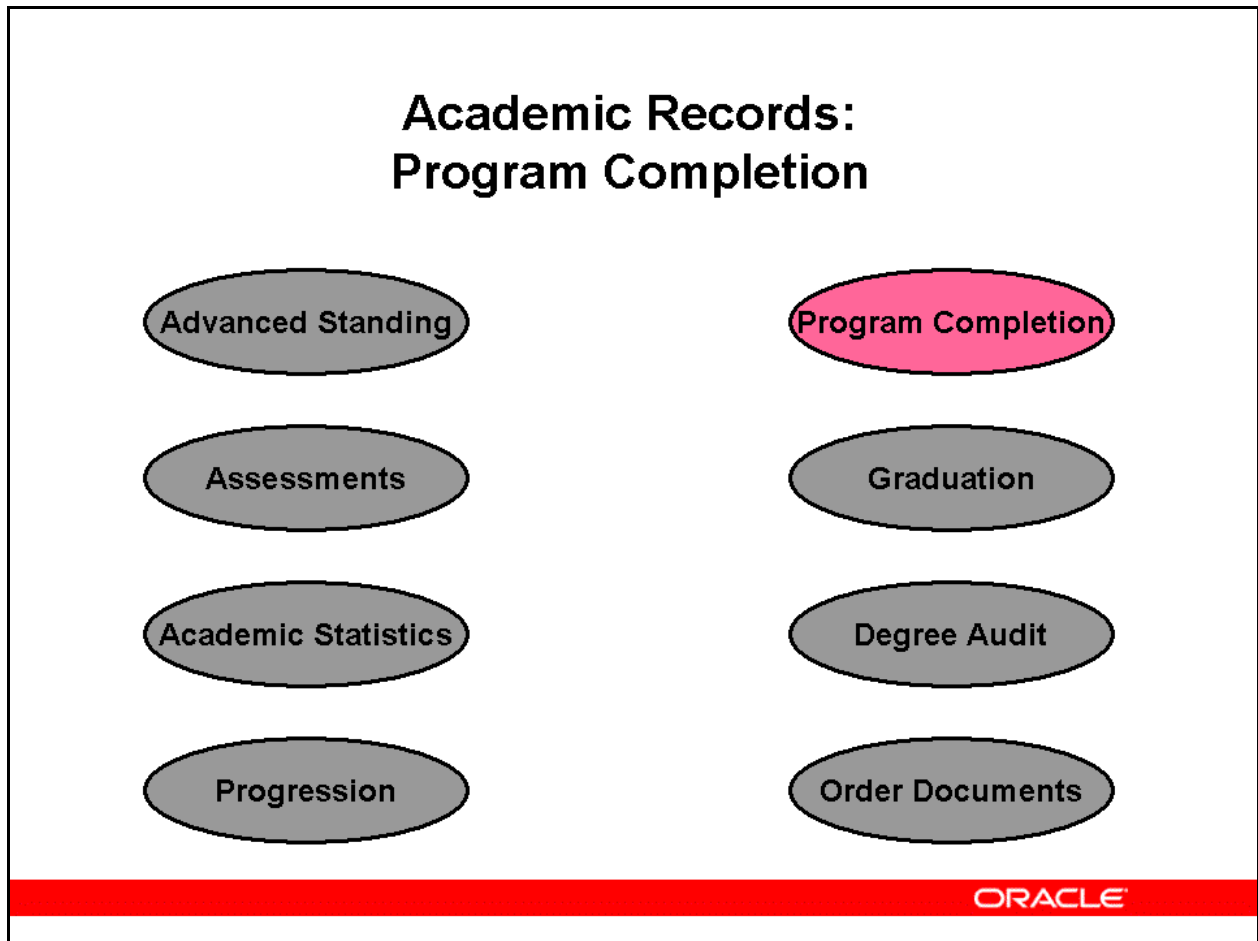
The following information is used to check the completion rule:

- **Standard Evaluation**

This is based on the current status of the relevant student program attempt. During evaluation, only the students whose final results are entered are considered.

- **Predictive Evaluation**

  This is based on the assumption that all the enrolled unit attempts will be successfully completed. Student unit attempts without final results and a status of incomplete are also included.
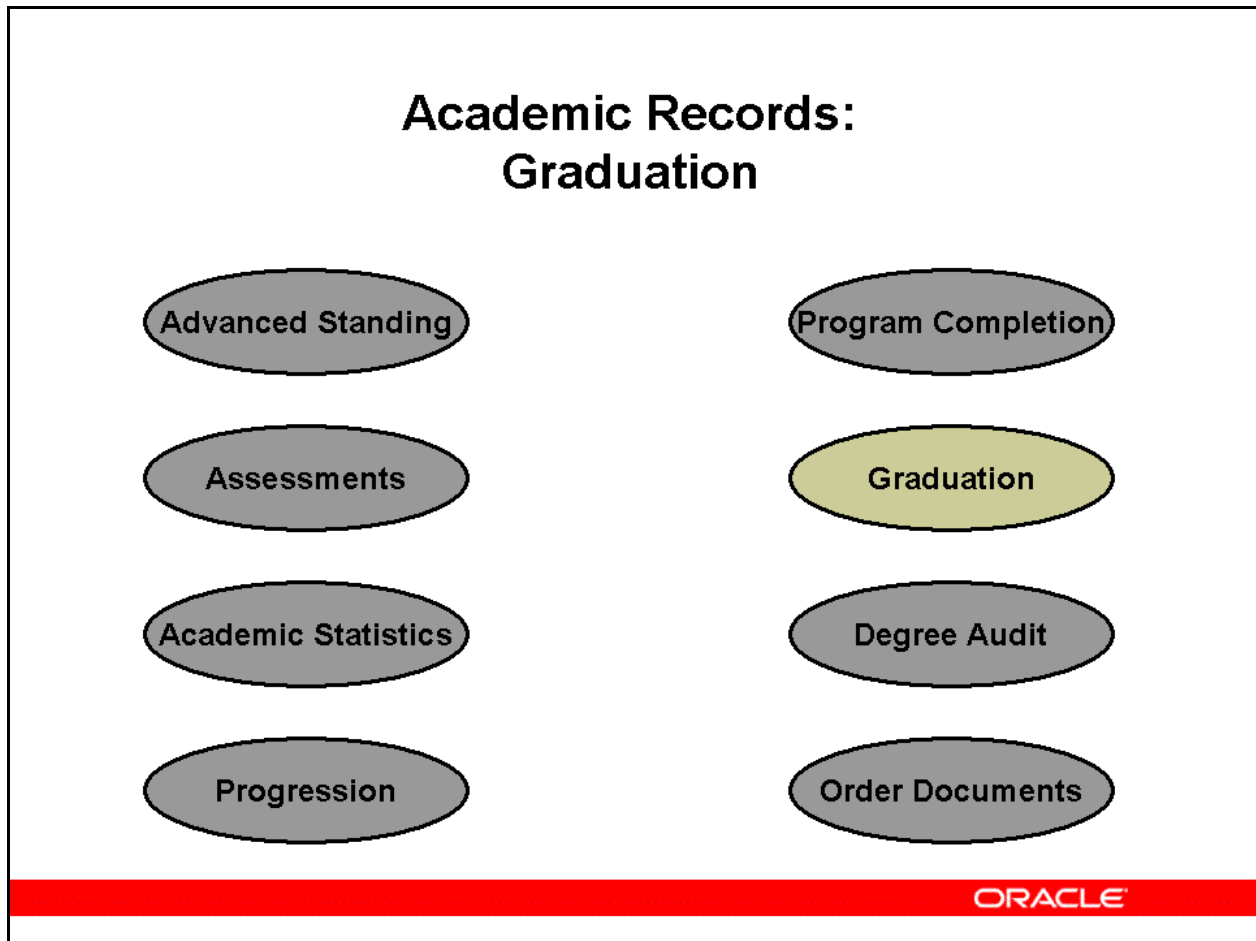
Academic Records: Program Completion

Students must complete all program and award requirements set by the academic body that oversees them. The administrator defines completion rules for each program. Faculty or designated personnel evaluate a student program attempt against these completion rules.

The following information is used to check the completion rule:

- A standard evaluation: This is based on the current status of the relevant student program attempt. During evaluation, only the students whose final results are entered are considered.

- A predictive evaluation: This is based on the assumption that all the enrolled unit attempts will be successfully completed. Student unit attempts without final results and a status of incomplete are also included.

Academic Records: Graduation

Graduation is the final stage in student academic career. A student must have successfully completed the program enrolled in to be eligible for graduation.

A graduation cycle is the period of activity ranging from preparation for the graduation of students to the follow-up activities after the ceremonies. The cycle involves:

- **Identifying possible graduands**

   The graduation specialist identifies eligible graduands and creates graduand records.

- **Assigning graduands to ceremonies**

   Graduands can be assigned to ceremonies even before graduand records are created.

- **Corresponding with graduands**

   Graduands are informed either that they are eligible to graduate or will be able to graduate on meeting program completion requirements. They are also informed of the ceremony round to which they are assigned.

   A ceremony round refers to a period of time when a set of graduation ceremonies is conducted. The term can also imply the preparatory events and processes leading up to the ceremony period itself. Each ceremony round is linked to one or more completion

periods called ceremony round periods, in which the student is likely to complete program requirements.

- **Granting approval to graduate**

  An administrative organizational unit or council approves graduand eligibility.

- **Managing graduands**

  Graduands respond to the correspondence sent to them indicating their intention to either attend the graduation ceremony or receive in absentia. Graduands options can include the following:

  - **Alternative exit**

    Where a student opts for a lower level of qualification than the one originally enrolled in. For example, a student enrolled in a Bachelor of Commerce program has the option to exit that program with a Diploma of Business Administration on satisfying the program completion requirements of the lesser degree.

  - **Articulate an award**

    When a student opts to forgo an award or a degree to pursue a higher level of program, it is called articulating an award. For example, a student can forgo an undergraduate degree in commerce to continue directly into the masters program.

  - **Defer an award**

    When a graduand wishes to postpone graduation, but the graduation specialist is unable to allocate the graduand to a future ceremony round.

  - **Surrender an award**

    Before taking an award in the current round, a student is obliged to surrender a related previously conferred award. For example, a graduand accepting a Bachelor of Commerce with Honors surrenders the previous Bachelor of Commerce award.

Based on the graduand response, the graduation specialist updates the graduand records. Graduands are assigned a unique number that determines the order in which graduands will receive awards.
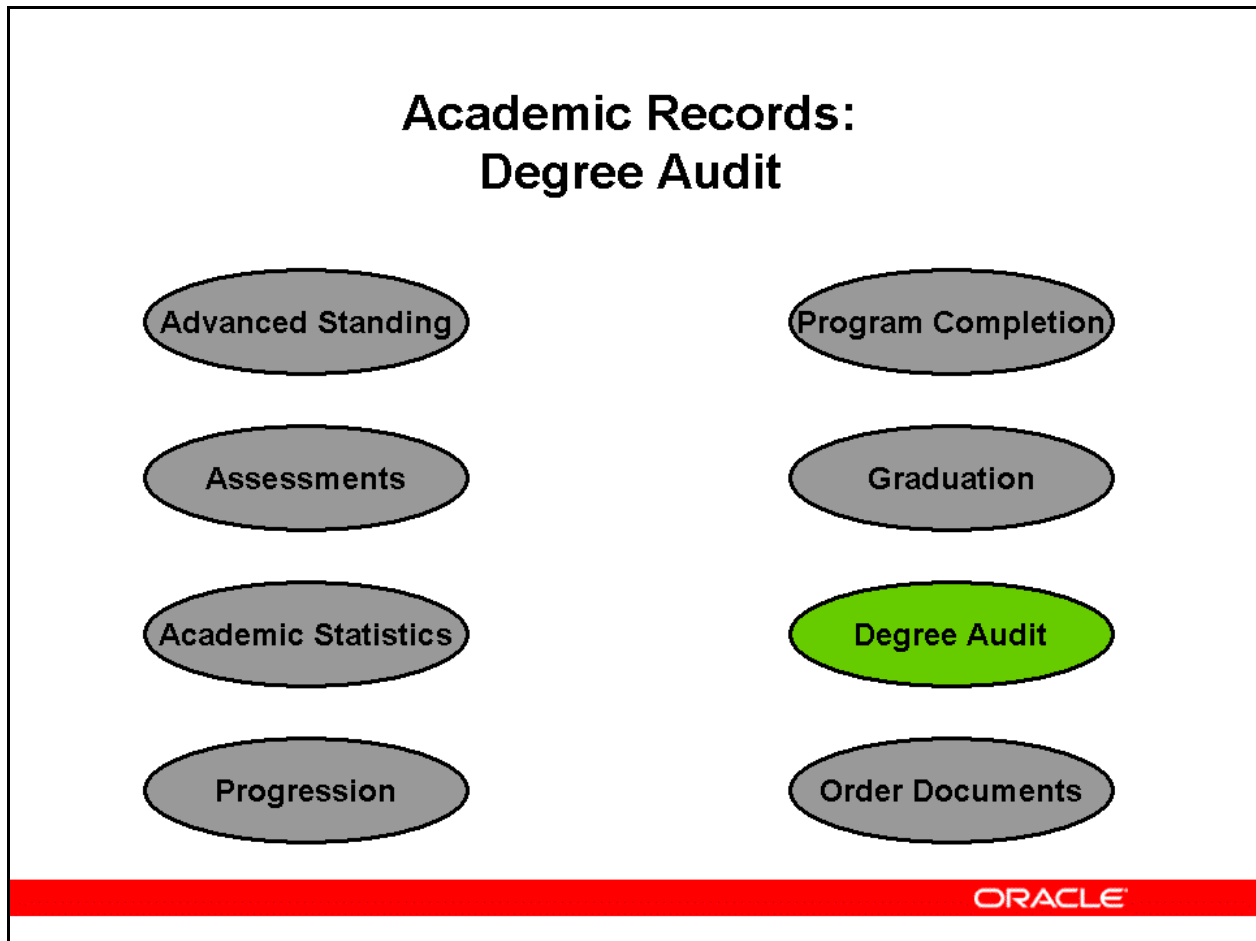
Academic Records: Degree Audit

Degree audit is an analysis of student progress toward meeting degree requirements. It evaluates current or expected program work against the requirements for degree award.

Degree audit performs the following:

- **Program comparison**

    For students considering a change in their major, degree audit provides what-if scenarios to show how course work already completed can be applied to other potential majors and what other courses students need to complete.

- **Transfer evaluation**

    When students transfer from one academic institution to another, a degree audit compares student credit points from the previous institution against the current institution's program completion requirements. The degree audit calculates and reports on the credit points required and identifies the units that the student can choose to meet the requirement.

- **GPA calculation**

Calculation of external GPA not supported by Oracle Student System. For example, special academic statistics such as Major or Minor GPA are calculated.

- **Degree completion**

  Assess general student progress, provide assistance both in making degree completion decisions and identifying eligible graduands.

Oracle Student System uses a third party degree auditing software to perform the above tasks. The processed information is then transferred to Oracle Student System
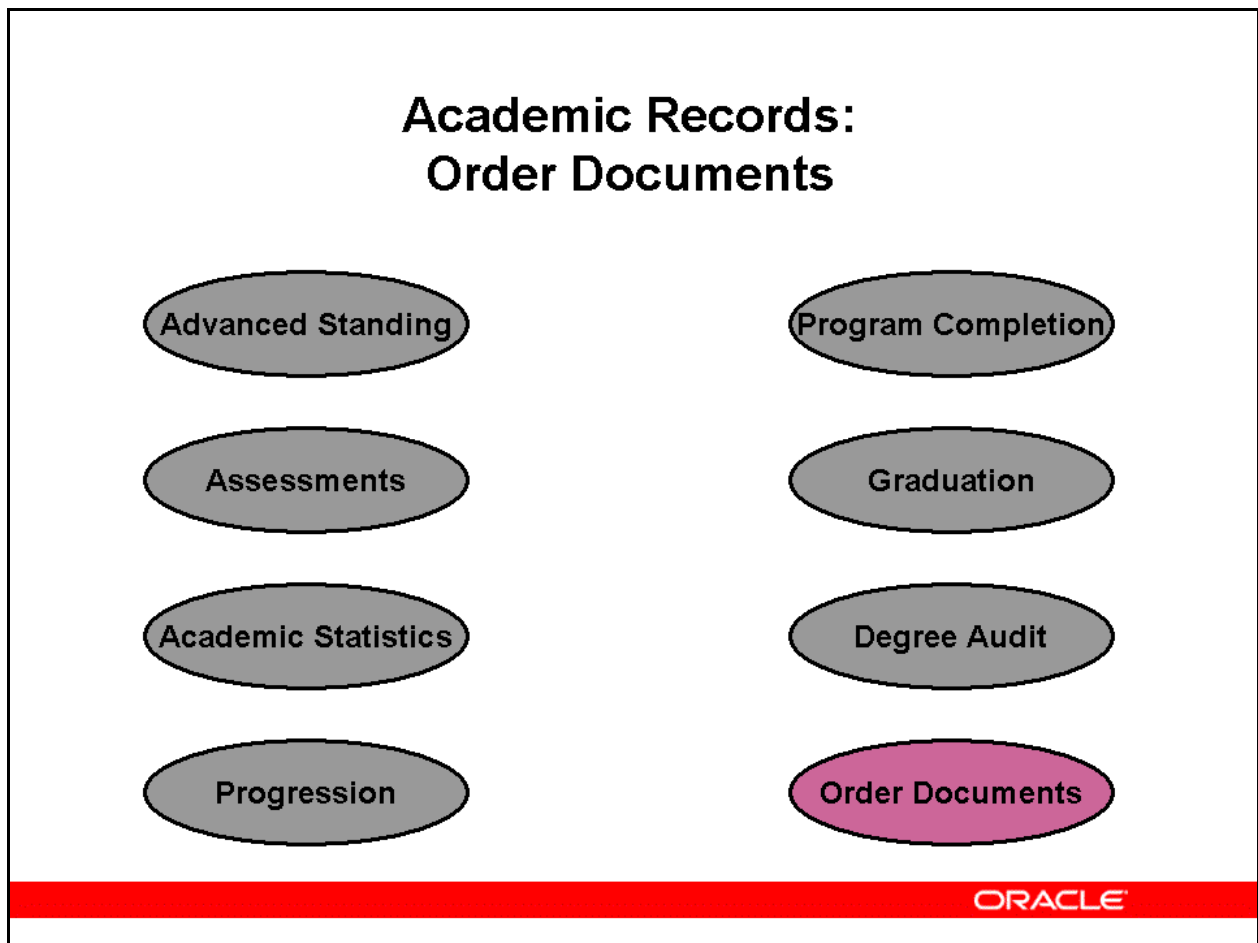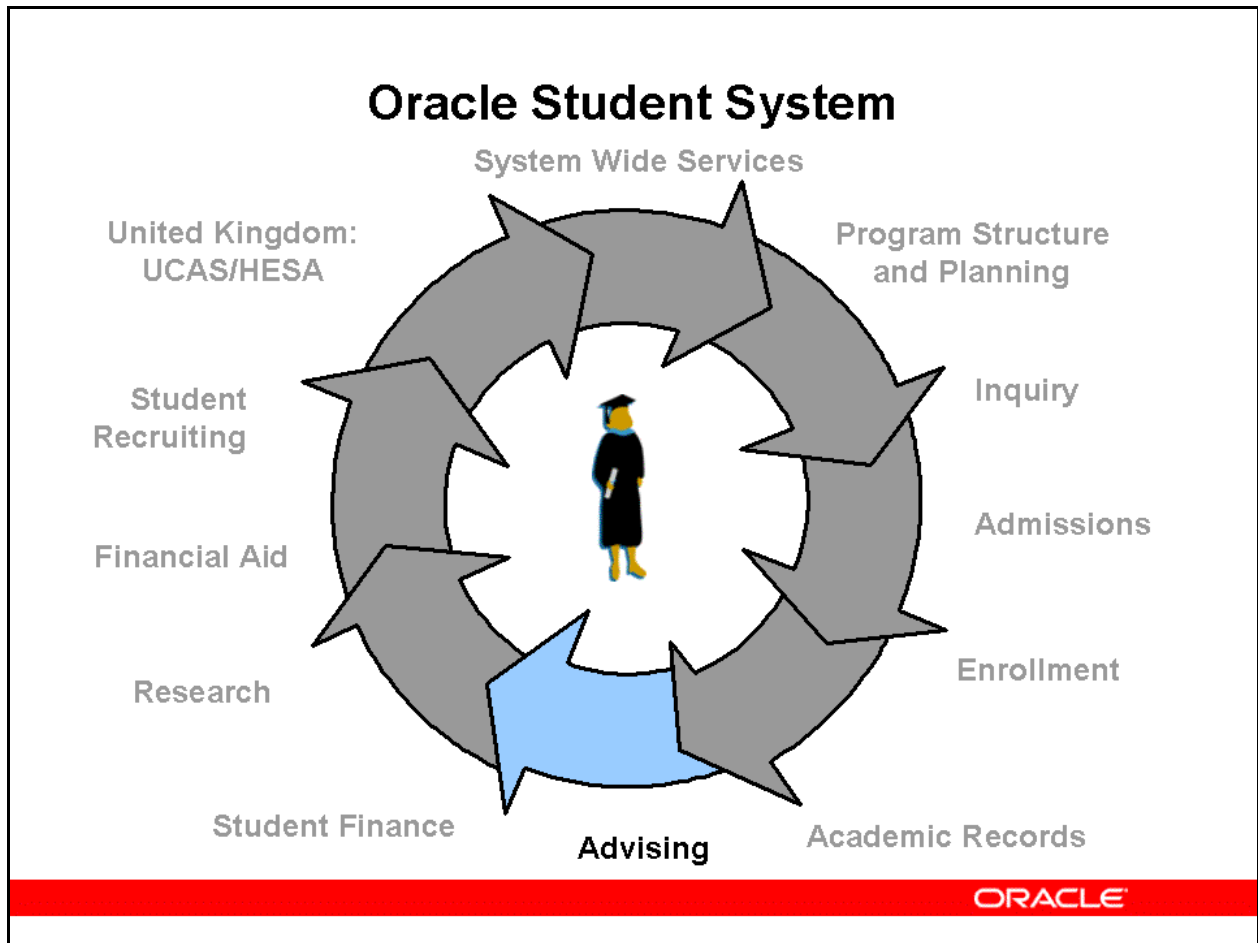
Academic Records: Order Documents

On program completion, students can order transcripts and enrollment certificates through self-service.

The administrator can place bulk orders on behalf of students.

You can offer various transcript service plans. Students choose a plan in self-service and pay the appropriate charges. Students must pay document fees if they request documents beyond the limit of the transcript service plan chosen. They can also cancel plans if desired.
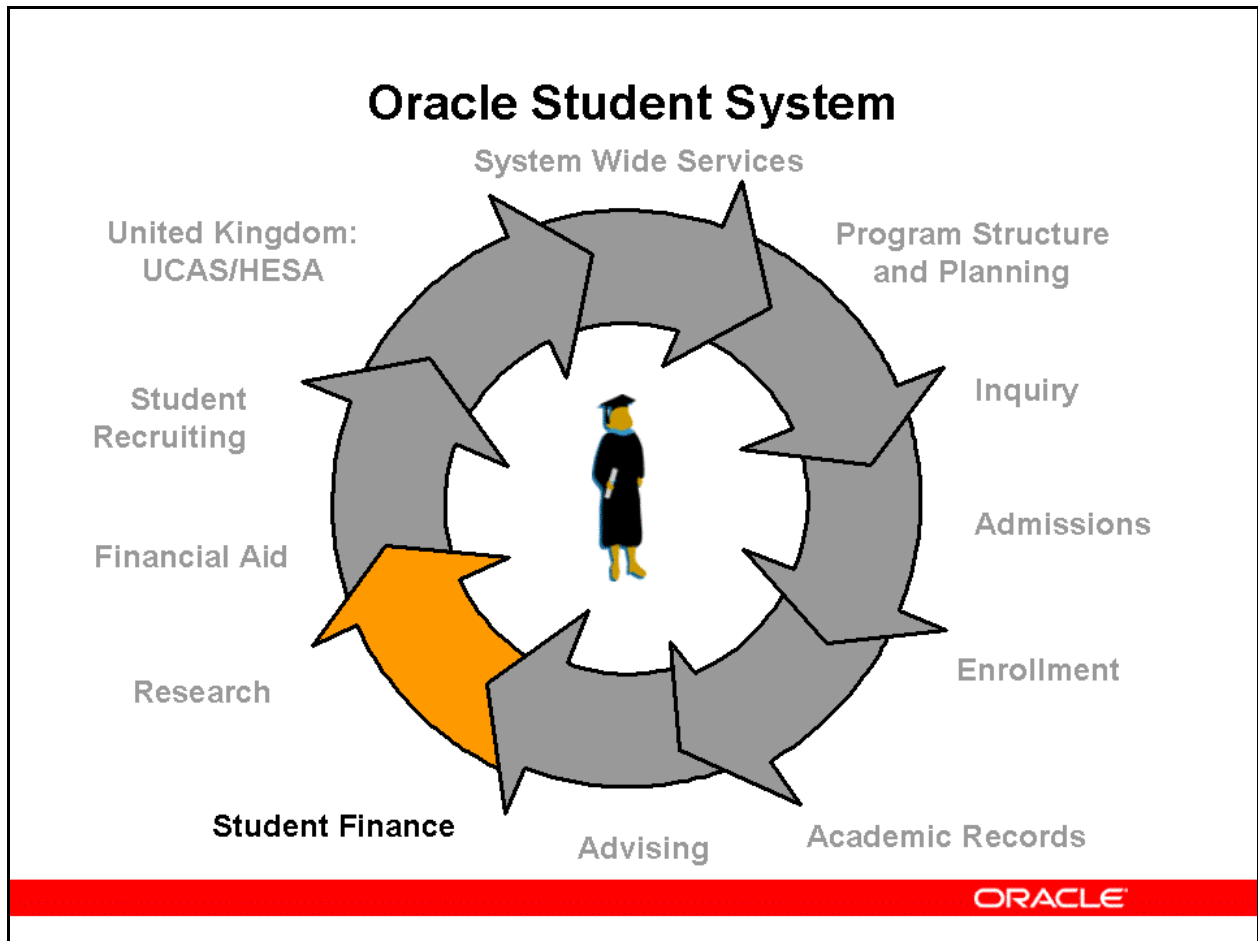
Oracle Student System

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

Program Structure and Planning

Student Recruiting

Inquiry

Financial Aid

Admissions

Research

Enrollment

Student Finance

Advising

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Advising

The Advising subsystem is used to create advising groups, match students to advisors, apply and release holds, and request degree audits.

The Advising functionality is available only in self-service.

Oracle Student System

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

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Student Finance

The Student Finance subsystem manages all financial transactions and accounting processes that determine student charges and credits for a specific study period.

Major functionality includes the assessment of tuition and fees, payments and deposits received from students and sponsors, and disbursements from the Financial Aid subsystem.

Using the fee assessment procedure, you can calculate student fees based on the student's enrollment status and the number of programs in which the student is enrolled.

This subsystem is also used to maintain all sponsorship-related information.

Using payment plans, students can pay charges in installments. If a student fails to pay an installment by the specified due date, finance and late charges are levied. Student Finance offers several payment modes, including over-the-counter payments, mail-in, and self-service payments. For all payments, Student Finance generates the appropriate receipts, billing extracts, and refunds.

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

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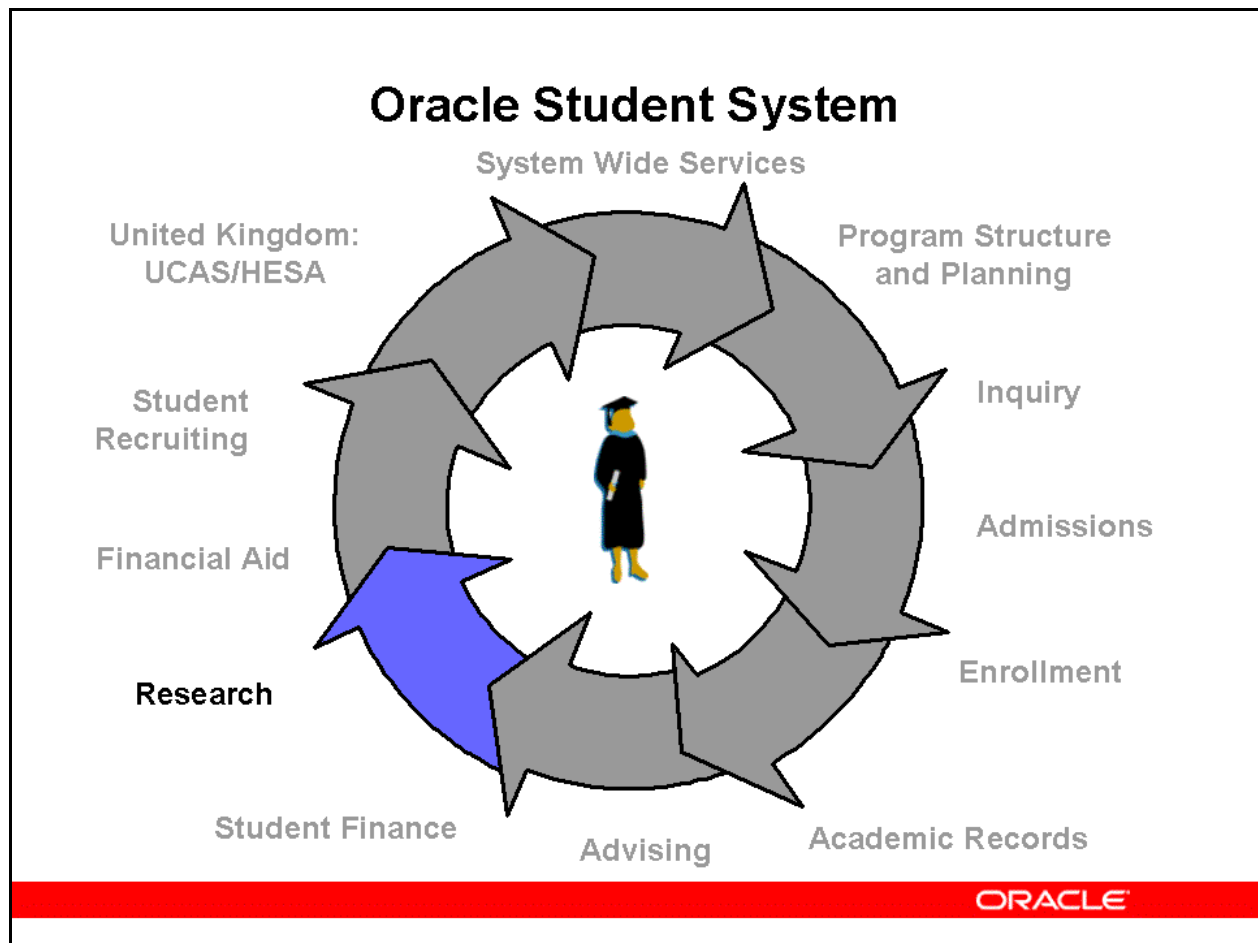
Research

The Research subsystem is used to manage research candidates. You can add and maintain information related to a student's research program, scholarship, milestones, supervisors, and theses.

You can also use Tracking to monitor research progress.

Oracle Student System

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

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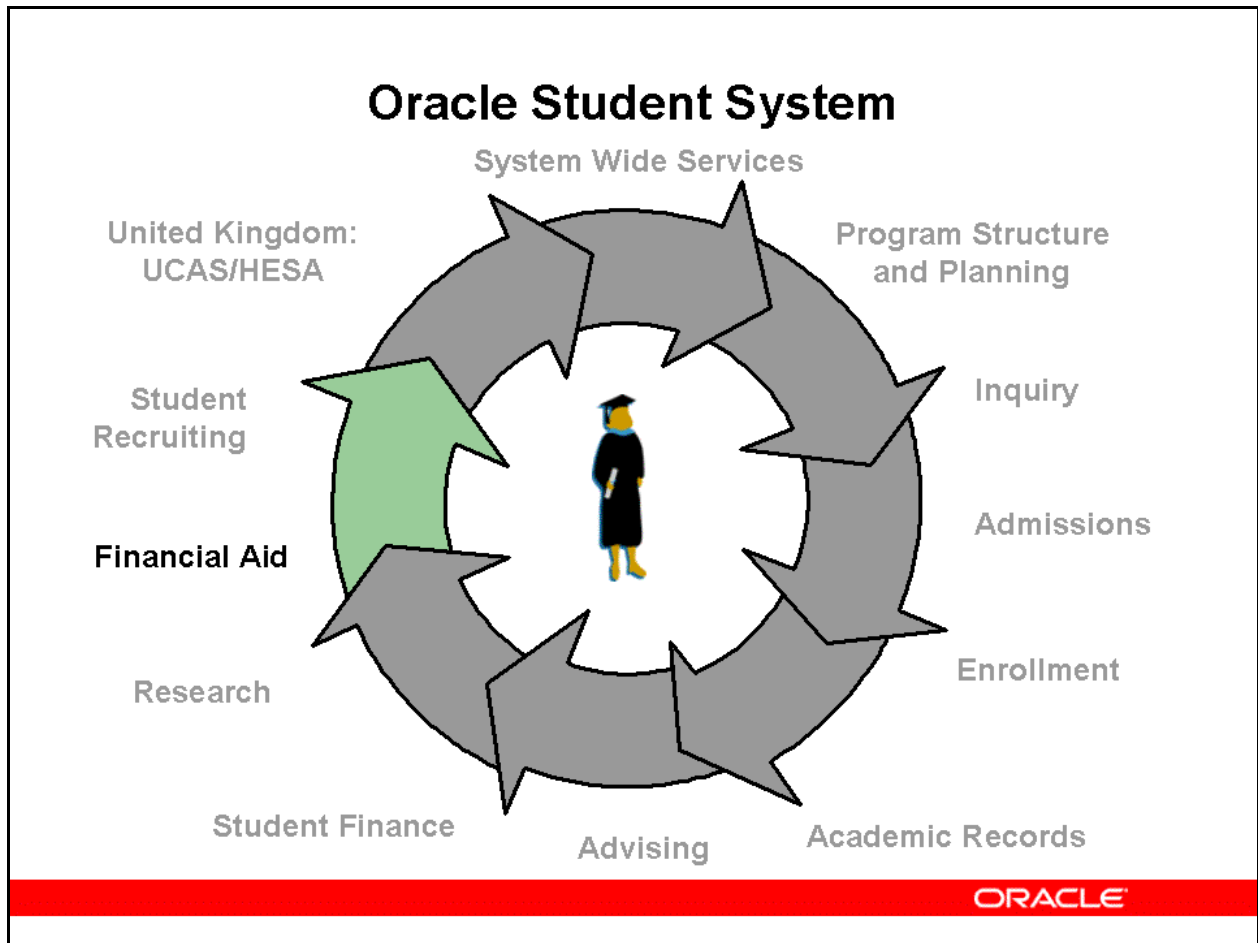
Financial Aid

Use the Financial Aid subsystem to manage the broad spectrum of financial aid related activities.

This includes processing applications, determining eligibility, awarding and disbursing funds, and reporting data. Depending on the funds awarded, institutions can interact with the Common Origination and Disbursement (COD) system, third-parties, and external processors.

Using the subsystem, institutions can award, monitor, and manage all forms of financial aid, including Pell Grants, loans, sponsorships, and student employment.

The subsystem is extremely flexible and can be configured to meet your particular financial aid processing requirements.

Oracle Student System

Oracle Student System

System Wide Services

United Kingdom: UCAS/HESA

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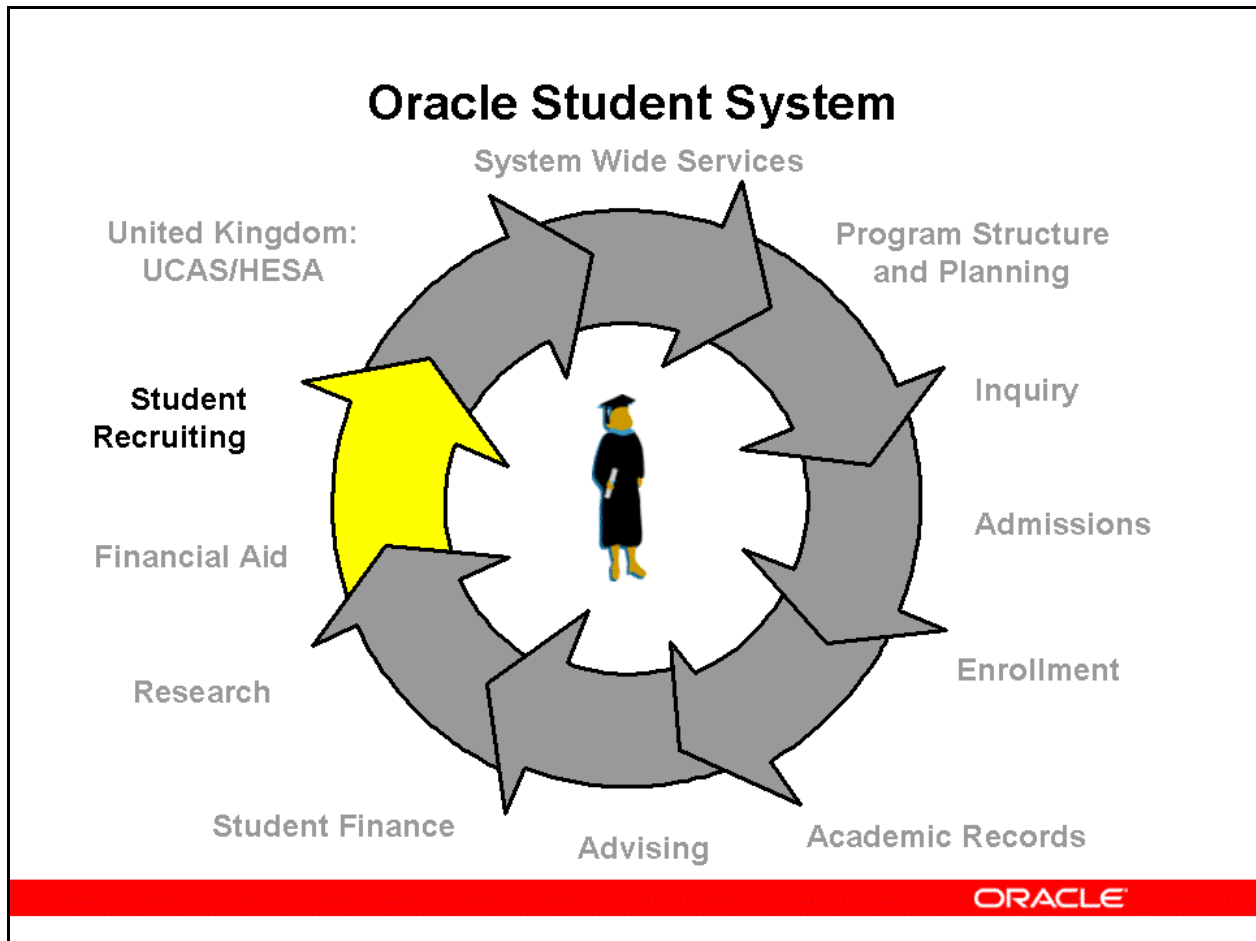
ORACLE

Student Recruiting

Oracle Student System integrates with Oracle Sales and Marketing products to create a powerful student recruiting tool that provides targeted and one-to-one marketing for prospective students.

Using the functionality available in the Oracle Sales and Marketing products, recruiters can:

- Execute recruiting campaigns through multiple channels
- Fulfill requests for information
- Develop targeted lists
- Create personalized marketing messages
- Maintain deadlines
- Organize on or off campus events

Because all interactions between prospects and the educational institution are maintained in a single repository, you have access to information collected through other recruitment and marketing efforts. You can view notes from discussions with a prospect, access program and personal interests, and use event registration tools.

By leveraging information from each interaction, recruiters and staff focus on meeting prospective student needs. Personalized communications leads to increased admission yield rates, applicant satisfaction, and eventual retention.

Oracle Student System
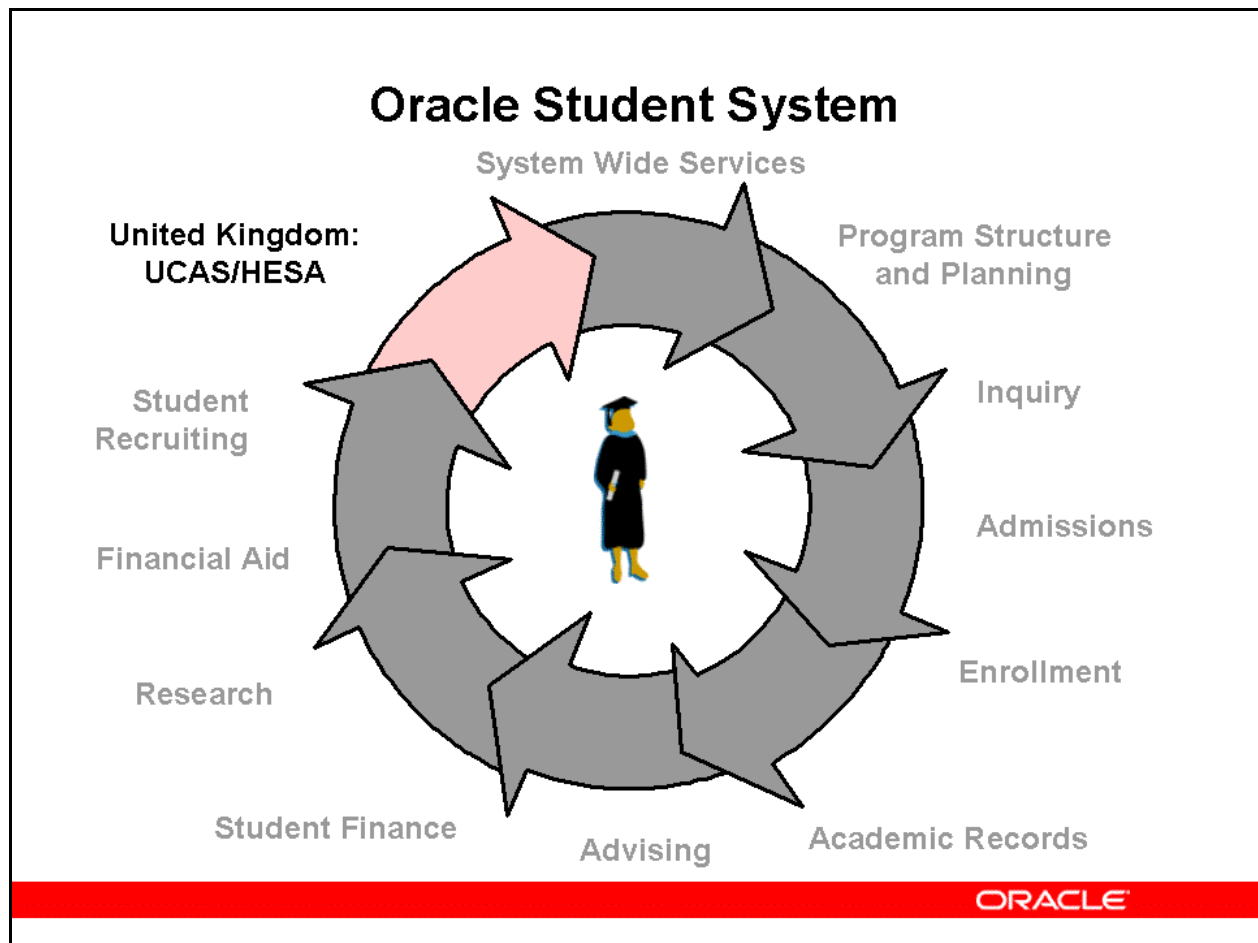
United Kingdom: UCAS/HESA

Oracle Student System for the United Kingdom (UK) provides additional functionality specific to UK educational institutions.

Oracle Student System for UK contains:

- **Universities and Colleges Admissions Service Subsystem**

    The primary task of the Universities and Colleges Admissions Service (UCAS) interface in Oracle Student System is to process applications from UCAS. This includes related transaction processing and reporting.

    Institutions import data directly from the *UCAS Hercules* (Higher Education Recruitment Communications between UCAS and Local Electronic Systems) database or from flat files provided by the *UCAS Marvin* (Main Access Route for Varsity Information) interface.

    The UCAS interface allows you to:

    - Import and maintain reference and common data, and application details from UCAS
    - Create and maintain offer condition templates in a generic offer library

- Import Marvin reference data and maintain small systems applications
- Record changes to applications as UCAS transactions
- Export application details to the Admission subsystem
- Record candidate clearing details
- Export transactions, program alterations, and institution-specific offer codes to UCAS
- Delete records of applicants who withdraw from the UCAS admission process

- **Higher Education Statistics Agency Subsystem**

  The Higher Education Statistical Agency (HESA) subsytem captures necessary data and generates HESA return files in the required format.

  To enable submission of student-based statistical returns to HESA, administrators must complete the required setup.

  The HESA subsystem allows you to:
  - Define Oracle Student System reference codes
  - Define and maintain mapping between Oracle Student System and HESA codes
  - Define and maintain FTE calendars
  - Calculate student full-time equivalence
  - Enter and maintain qualification details, manually
  - Capture student- and program-based information for HESA
  - Calculate UCAS tariffs
  - Identify target population for Destination of Leavers of Higher Education (DLHE) surveys
  - Collect information for DLHE surveys
  - Define user return classes based on provided system return classes
  - Define, generate, and maintain HESA returns
  - Export HESA data from the UCAS interface to Oracle Student System
  - Generate return files for submission to HESA

- **UK Modifications to Oracle Student System**

  Oracle Student System for the United Kingdom includes modifications to some application windows to enable additional UK-specific functionality.

  The following subsystems are modified for UK users:
  - Program Structure and Planning
  - Person Reference
  - Admission
  - Enrollments

  Oracle Student System is also modified to enable the year of program functionality because program completion in the United Kingdom is tracked on the basis of the number of years a student has completed from the total duration of the program.

  This functionality was originally developed for the United Kingdom but is also available as part of Oracle Student System for other countries, including the United States.

Agenda

Agenda

- Introduction to Oracle Student System
- Overview of Oracle Student System Subsystems
- **Integration with Other Products**
- Additional Tools

ORACLE

Introduction to 11*i* Oracle Student System

Integration with Other Products
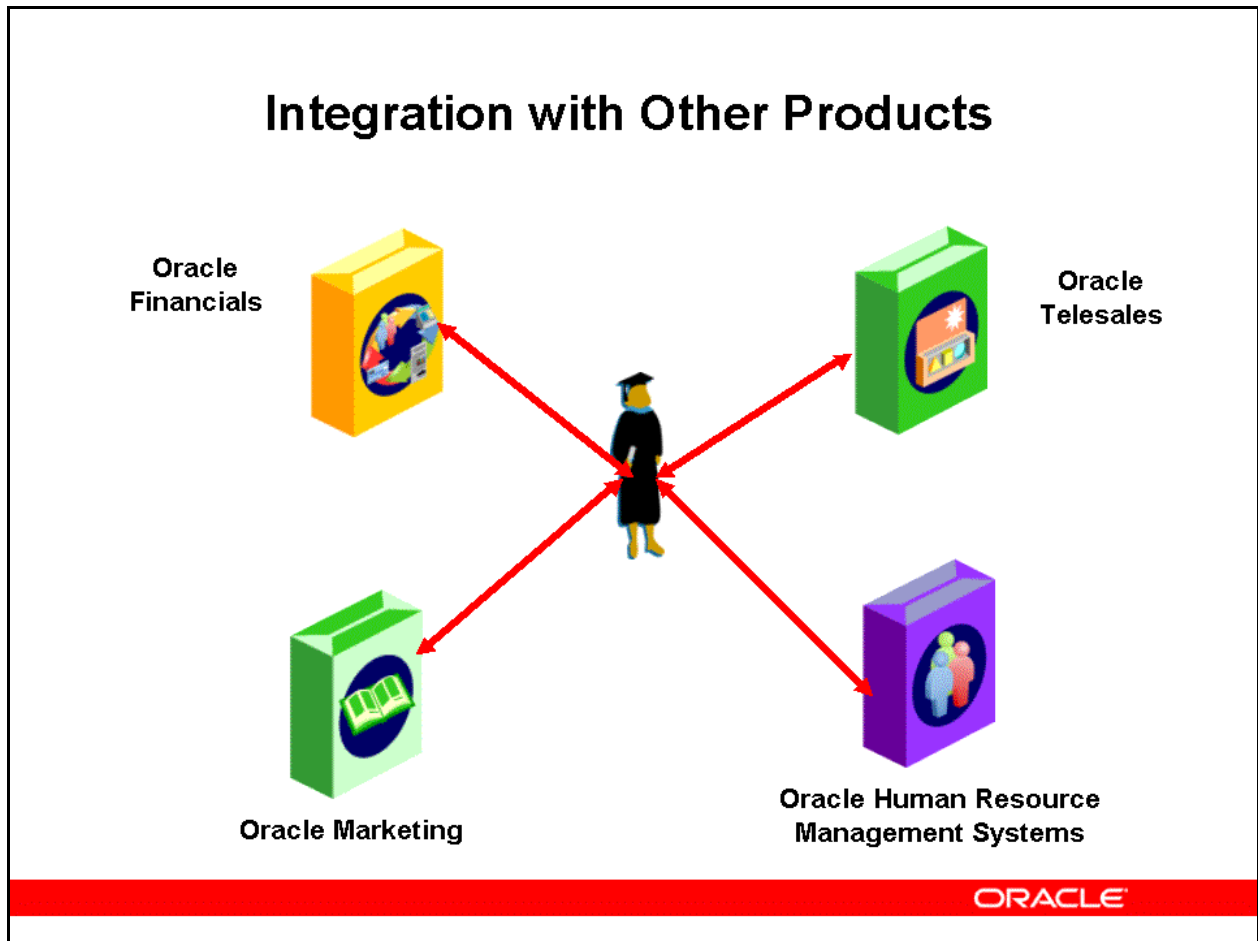
Integration with Other Products

Oracle Student System can be used with several other Oracle products to offer more powerful and effective solutions.:

- Student Finance can use Oracle General Ledger, Oracle Receivables, and Oracle Payables to maintain financial data and carry out account management activities, such as billing.

- Oracle Marketing allows you to plan, execute, and manage marketing campaigns.

- Oracle Trading Community Architecture (TCA) is a data model used to store business information, including people, places, organizations and the relationships between them. It serves as a common repository for people and organization related information across all Oracle Applications.

- Oracle Telesales helps you manage communication with target groups through the telephone. A contact profile is always updated in real time, therefore keeping all information current.

- The Correspondence subsystem works with tools such as Oracle One-to-One Fulfillment and Oracle Customer Interaction History to set up, dispatch, and track correspondence items.

- Oracle Student System can also be integrated with Oracle Human Resource Management Systems or Oracle Payroll.

  If integrated, the Financial Aid subsystem allows the processing of payroll details and maintenance of human resource records for students awarded employment. In addition, you can easily export employment data to off-campus human resource systems.

Oracle Financials

- **Oracle General Ledger**

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

- **Oracle Receivables**

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

  - Person Address Validation

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

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

    The System Options form has many prerequisite setup steps.

  - Student Finance Lockbox

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

The Lockboxes form has prerequisite setup steps.

- **Oracle Payables**

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

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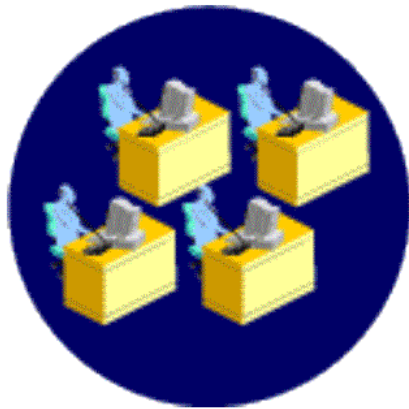
Oracle Human Resource Management Systems (HRMS) enables you to maintain records for employees and staff.

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

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

Oracle *i*Payment

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

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

Oracle Portal

Oracle Portal

Oracle Student System provides three portlets:

- My Schedule
- My Fee
- My Personal Information

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

Oracle Portal integration is optional.

Oracle Trading Community Architecture

The Oracle 11*i* TCA model is a highly flexible architecture that allows you to fully model real world entities in your trading community and accurately represent the complex relationships among those entities.

TCA includes a database schema, APIs, and data quality management utilities that allow you to capture and exploit valuable information about your community, its organizations, people, and places.

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

Oracle Web ADI

Oracle Web Applications Desktop Integrator (ADI) is a self-service, spreadsheet-based extension to Oracle Student System that allows you to manage student grades.

Web ADI combines a spreadsheet's ease of use with the power of Oracle Applications.

Oracle Web ADI allows faculty members and system administrators to:

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

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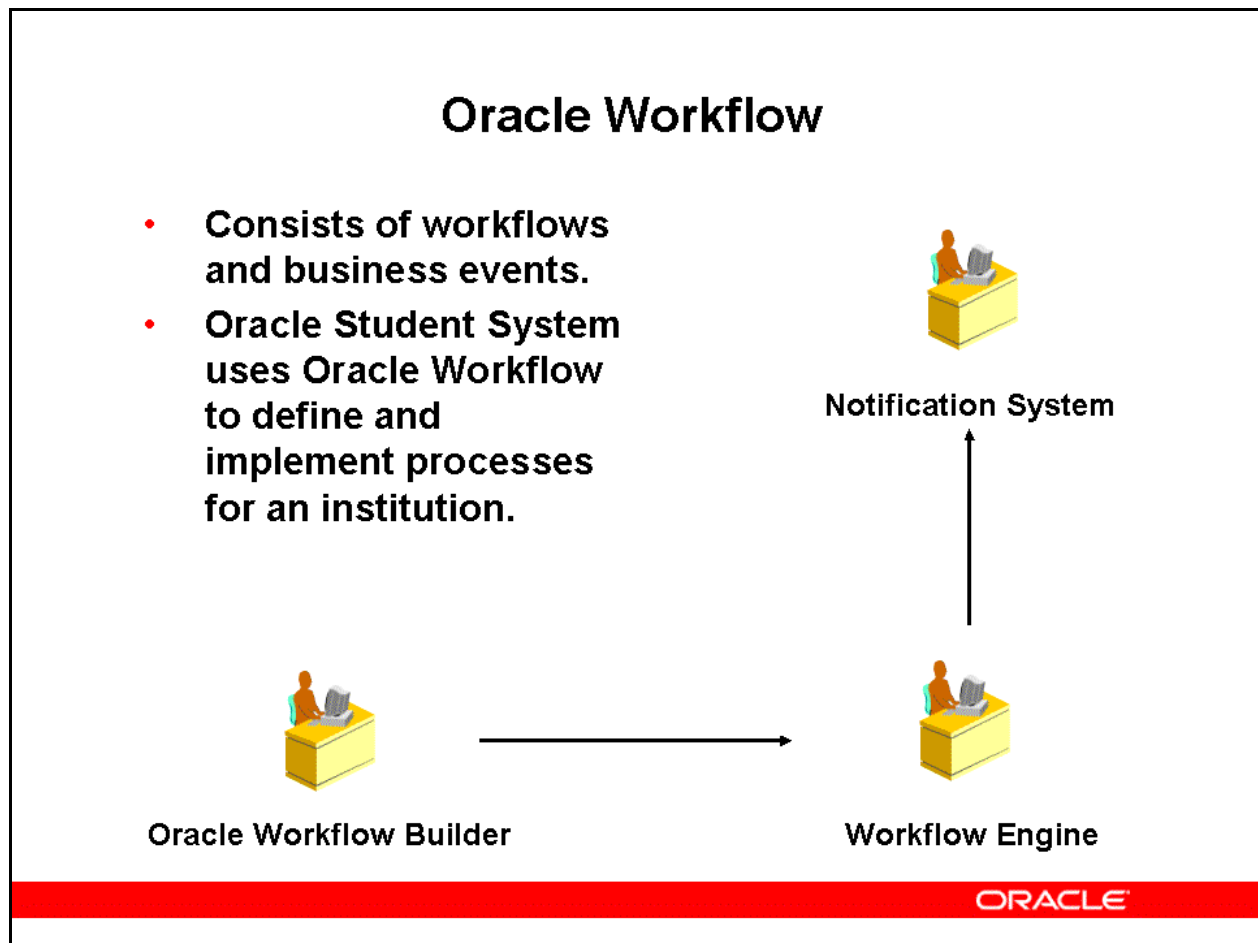
Oracle Workflow

Oracle Workflow

Oracle Workflow consists of workflows and business events.

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

Workflow features include:

- **Oracle Workflow Builder**

    A graphical tool that lets users create business process definitions

- **Workflow Engine**

    Implements process definitions at runtime

- **Notification System**

    Sends notifications and processes responses in a workflow

Workflow functionality in Student System allows you to automatically route information to users and to deliver notifications regarding issues needing attention or processes that have been completed.

Workflow features are available in the Person, Financial Aid and Academic Records subsystems.

Agenda

Agenda

- **Introduction to Oracle Student System**
- **Overview of Oracle Student System Subsystems**
- **Integration with Other Products**
- **Additional Tools**

ORACLE

Introduction to 11*i* Oracle Student System

Defining Oracle Student System Responsibilities

The implementer must have System Administrator access at the instance level to create users and assign user responsibilities. This security level is set at the instance level during installation of the Oracle E-Business Suite

- Under the System Administrator responsibility, create users
- For each user, create one or more responsibilities based on the user roles and responsibilities

  Note: System Administrator responsibility can be granted to functional users by technical staff during the installation of the Oracle *e*Business Suite

- Create additional responsibilities and associated menus

Oracle Student System includes the following responsibilities:

- **AK Developer**
- **Application Developer**
- **System Administrator**
- **Oracle Student System Super User**
- **Financial Aid Super User**

- **SEVIS Administrator**
- **OSS Administrator Self Service**
- **OSS Advisor Self Service**
- **OSS Alumni Self Service**
- **OSS Applicant Self Service**
- **OSS Faculty Self Service**
- **OSS Former Student Self Service**
- **OSS Guest Self Service**
- **OSS Recruiter Self Service**
- **OSS Student Self Service**
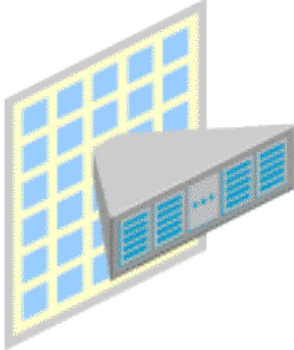
Flexfields

Flexfields

A flexfield is composed of subfields, or segments.

There are two types of flexfields:

- Key
- Descriptive

Oracle Student System uses descriptive flexfields, which provide customizable expansion space on windows.

Lookups

Lookups

A lookup type is a category of information such as nationality, address type, and tax type.

Lookup values are required to set up Oracle Student System and enable functionality. In Oracle Student System, all lookup types are seeded values.

System lookup types cannot be changed. For extensible and user-defined lookup types, users can create user-specific values.

Lookups provide lists of valid values that can be selected during Oracle Student System transaction processing and data entry.

This has two key advantages:

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

Profile Options

Profile Options

Oracle Student System profile options enable functionality specific to a subsystem or group of subsystems.

A profile option can be queried individually by its profile option name or by the application code IGS. The application code for the Financial Aid subsystem is IGF.

A profile can be set at the following levels:

- **Site**

  Use if the profile option applies to all users at your site.

- **Application**

  Oracle Student System or Oracle Financial Aid.

- **Responsibility**

  Use only if the profile option you are defining is specific to a responsibility.

- **User**

  Use only if the profile option you are defining is specific to a user.

Self Service
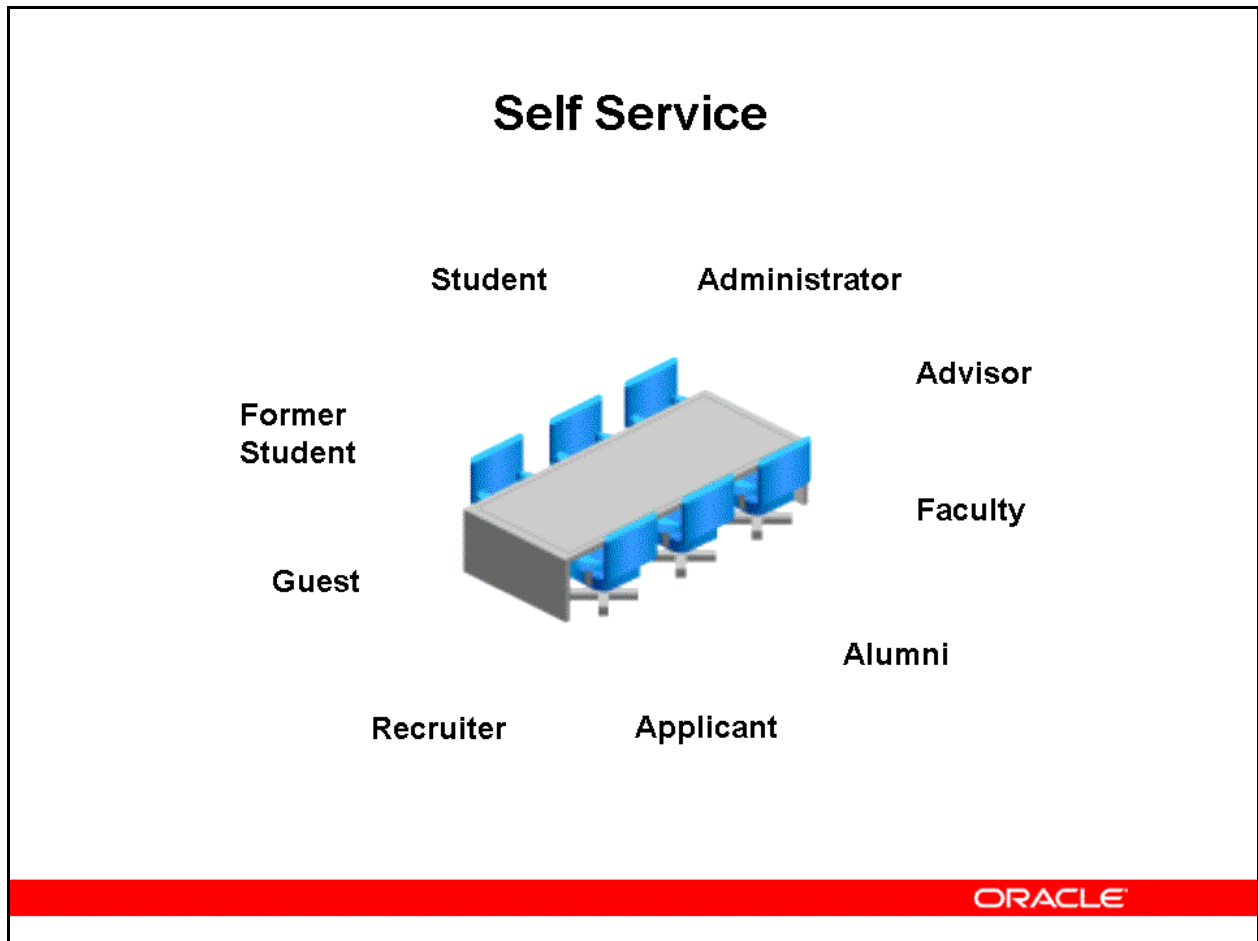
Self Service

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

Rules
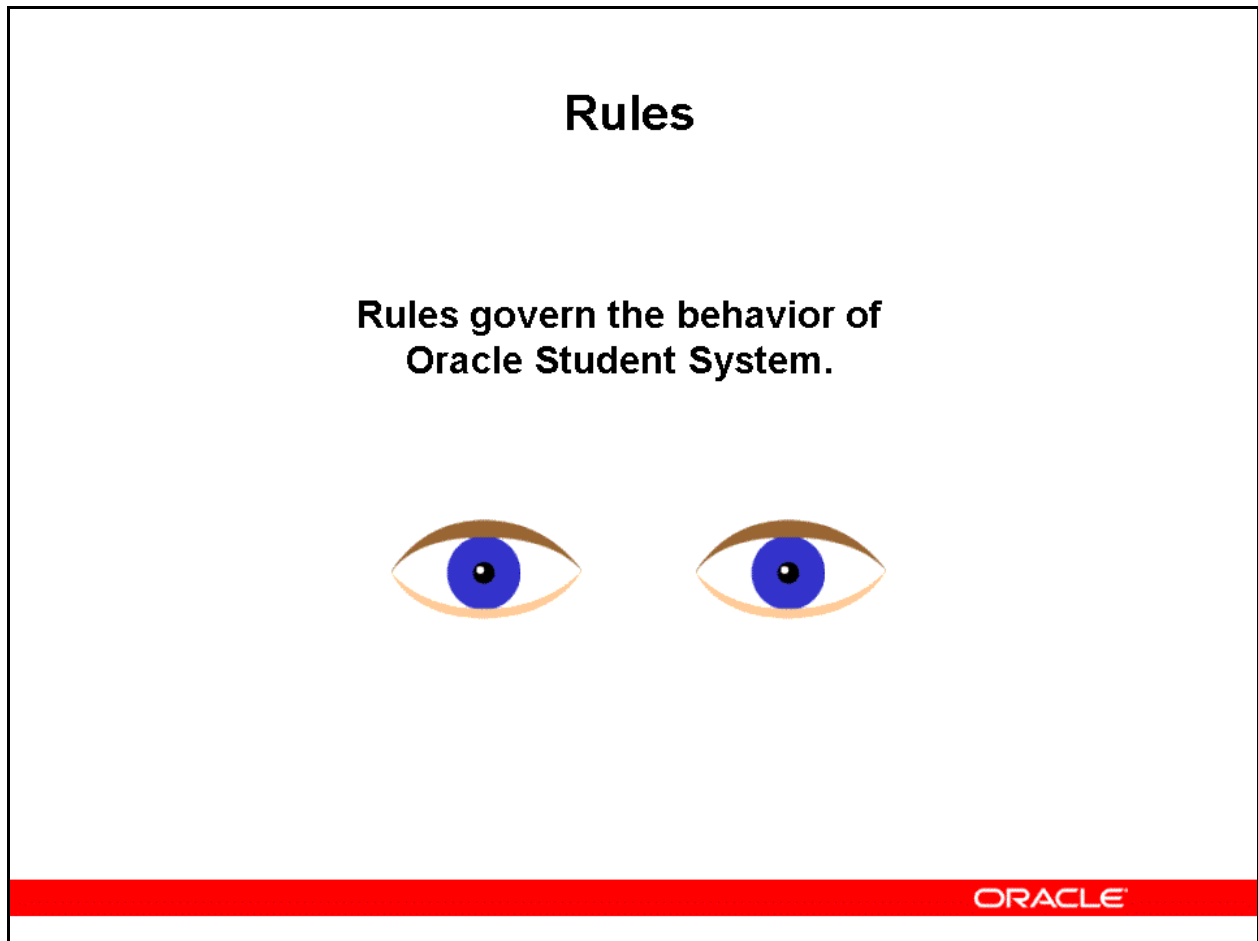
Rules

Rules govern the behavior of Oracle Student System.

You can modify some seeded rules to your business practices.

Rules are discussed in detail in Oracle Student System Implementation and Administration Guide.

General Guidelines

Responsibility

Unless otherwise noted, the required responsibility for performing the tasks detailed in this guide is Oracle Student System Super User.

Many organizations will have additional responsibilities available for individuals maintaining or working in specific subsystems.

Check with your System Administrator if you have any questions.

Navigation

Navigation paths in this guide are for the product as shipped, and do not reflect any customizations.

If responsibilities are changed after installation, the navigation paths may vary from those mentioned in this material.

Data Coordination

Some windows have a header region and a details region.

Select the Data Coordination check box to automatically populate, refresh, and coordinate data in the details region with header region data.

If deselected, data in the details region is refreshed only if the user navigates to the appropriate field.

Leave this check box deselected in order to speed up retrieval of records while querying data.

Save Step

To save your work, use the following:

(N) File > Save or File > Save and Proceed

Parent-Child Relationships

Closing a parent record will not close the associated child record(s).

Every child record must be closed manually.

For example, if an institution originally associated the Admission Category of Graduate (parent) with the Admission Process Category of Graduate/Program Admission Process (child), when you close the Admission Category: Graduate record, you must close the Admission Process Category: Graduate/Program Admission Process record.

You must close all the child records of the Admission Category: Graduate parent record.

Closing a parent record will not close the associated child record(s).

Summary